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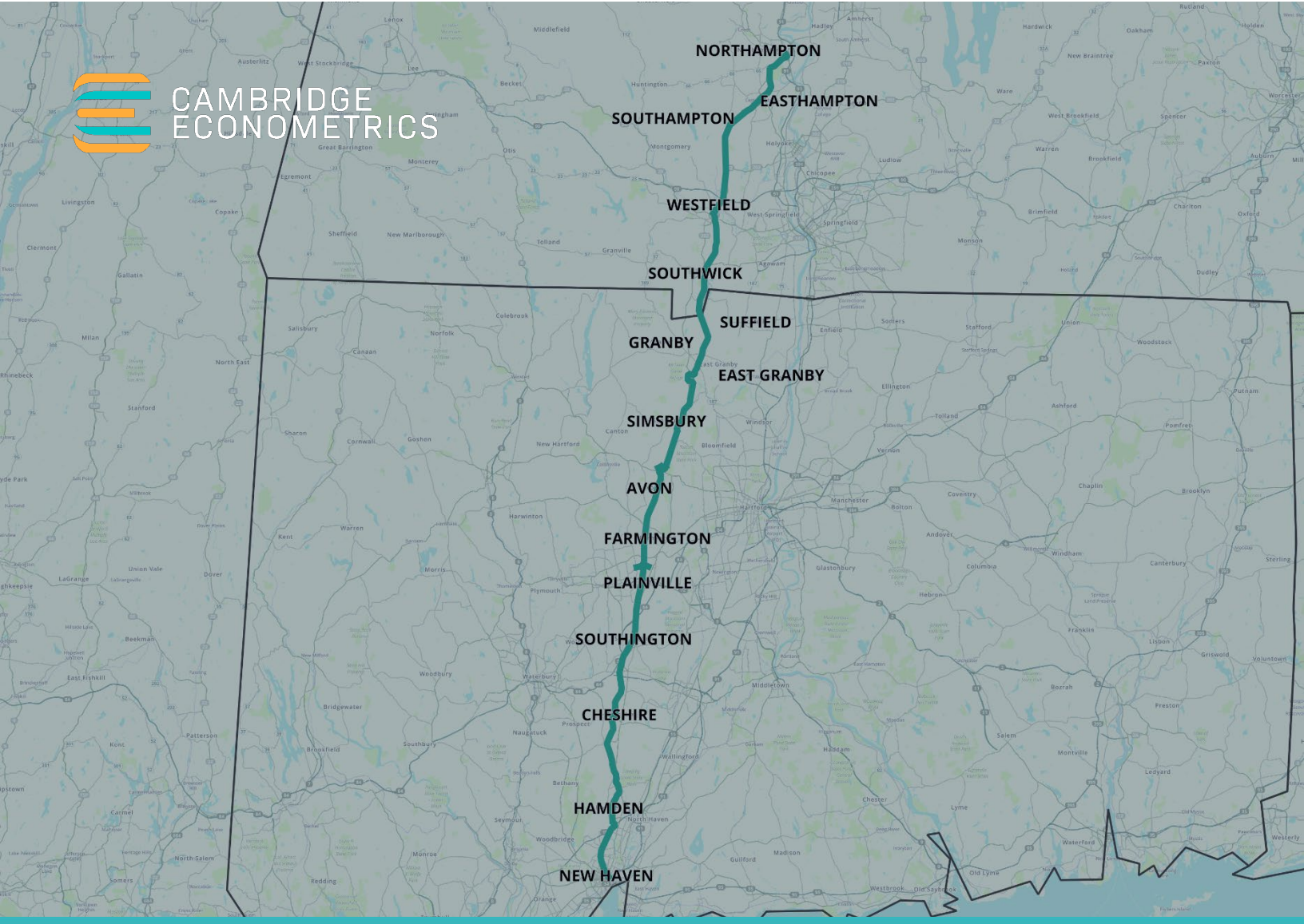

Economic Impact Analysis of the New Haven & Northampton Canal Greenway (NHNCG)

The NHNCG is comprised of the Norwottuck Rail Trail, Manhan Rail Trail, Southampton Greenway, Columbia Greenway Rail Trail, Southwick Rail Trail, and Farmington Canal Heritage Trail. Some of the trail segments in Connecticut also overlap with the East Coast Greenway.

Final Report

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CT NHNCG MA
NEW HAVEN & NORTHAMPTON CANAL GREENWAY

NORTHEAST GREENWAY SOLUTIONS

NORWOTTUCK NETWORK

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Executive Summary

The New Haven and Northampton Canal Greenway (NHNCG) is an 81-mile shared use path that follows the historic north-south route of the Farmington Canal, stretching from New Haven, CT to Northampton, MA. While currently 80% complete, planning efforts envision a continuous corridor for walking, running, and biking with connections to urban districts, town centers, neighborhoods, and natural landscapes. The greenway serves as a major recreational and transportation asset for the region, and a completed trail would further enhance the benefits of the path. Using CE's REACT input-output model, this study assesses the estimated economic impact of the *existing trail* and a *completed/continuous trail* on the Massachusetts and Connecticut economy. More specifically, three scenarios are assessed, representing:

- **Existing:** Users of the existing trail segments.
- **Low Scenario:** A conservative, near-term (5 years after trail completion) estimate of users of a *completed/continuous NHNCG.*
- **High Scenario:** A longer-term (10 to 15 years after trail completion) estimate that captures the full potential of the *completed/continuous trail* to attract a range of visitors through marketing campaigns, visitor experiences, and word-of-mouth promotion. This scenario also captures the benefits of a continuous NHNCG that connects to a completed 100-mile east-west Mass Central Rail Trail (MCRT) connecting Northampton, MA to Boston, MA.[1]

The current (existing) trail segments attract an estimated 800,000 user days each year. The two future scenarios estimate trail usage at corridors that are not yet developed and give existing trail segments a boost from the current user days as a result of increased connectivity. **The low scenario estimates a completed/continuous trail would attract 1.3 million user days each year while the high scenario estimates 1.6 million user days annually.**

These trail users spend money on food, accommodation, retail, and other items, benefitting local businesses and the overall economy. In addition to information about spending categories, users are also disaggregated by local, day, and overnight visitors, an important distinction because of the vastly different spending profiles across the three groups (i.e., overnight visitors spend more money and include spending on accommodation). **In total, existing trail users spend an estimated $15.1 million each year while users of a completed trail are estimated to spend $32.0 to $53.8 million annually.**

A completed NHNCG could support

Jobs	Value added	Output
351 to 582	$36 to $60 million	$68 to $114 million

[1] About 63 miles of the MCRT are currently open to the public either as improved or unimproved trails, while other segments are in active planning or construction. For more information, see https://www.masscentralrailtrail.org/

The direct economic activity by trail users has a ripple effect through the Massachusetts and Connecticut economies deriving from supply chain activities (indirect) and increased household income spending (induced):

- **Existing NHNCG trail** users are estimated to support **166 jobs that pay $9.3 million in earnings and generate $16.7 million in value added and $32.1 million in total output (sales).**
- **A continuous/completed NHNCG** could support **351 to 582 jobs, earning $20.0 to $33.5 million in wages and generating $35.7 to $60.0 million in value added and $68.4 to $114.4 million in output.**

In addition to the quantitative analysis of economic impacts discussed above, this study also includes stakeholder interviews with local businesses along the existing NHNCG corridors. Each of these businesses, along with countless others, benefits from the existing NHNCG corridors that pass by their respective establishments. The case studies demonstrate the tangible economic impact of the NHNCG.

- Located in a refurbished railroad depot on the Manhan Trail segment of the NHNCG in Easthampton, MA, **Tandem Bagel** is a Western Mass favorite serving bagels, bagel sandwiches, coffee, and more. Each month, trail users generate thousands of dollars in revenue for the business.
- **New Horizons Bikes** has been located at the same location in downtown Westfield, MA since 1984, situated about two blocks away from the local segment of the NHNCG called the Columbia Greenway Rail Trail. The majority of New Horizons Bikes' customers are recreational or casual riders who primarily ride on the nearby bike path.
- **Congamond Coffee & Café** is located right off the Southwick Rail Trail segment of the NHNCG. Cyclists make up about a third of all customers (not even including walkers on the trail)!

- **The Bicycle Cellar** in Simsbury, CT is celebrating its 60th anniversary at the same location, just off the Farmington Canal Heritage Trail corridor of the NHNCG. At least 70 percent of the shop's bicycle sales and almost all bike rentals are primarily for use on the nearby bike trail corridor.
- The **City Climb Gym** in New Haven, CT offers indoor rock climbing and fitness as well as hosting birthday parties and events. On any given day, the gym will have least five to ten bikes on the rack outside. The option to cycle or walk to the rock gym is important because without these alternative transportation options, City Climb would miss out on customers due to the limited parking spaces available.

This report also considers the potential economic impacts of a shared use path following the **Merritt Parkway/Route 15** corridor from New Haven to the border of Connecticut and New York in Greenwich, CT. The corridor does not have any existing path infrastructure, but was originally designed with space to accommodate bike and pedestrian paths. If the Merritt Parkway/Route 15 shared use path corridor were constructed, it could attract an estimated 1.4 to 1.9 million user days each year and generate $37.3 to $61.0 million in direct annual spending. This spending would ripple through the Connecticut economy, supporting 396 to 643 jobs, earning $20.9 to $34.3 million in wages and generating $40.7 to $66.6 million in value added and $75.1 to $122.7 million in output.

One additional economic impact analysis is completed as part of this study, **combining a continuous NHNCG with a completed Merritt Parkway/Route 15 bike/pedestrian trail.** This 130-mile continuous path would attract multi-day and overnight trips and provide new access to recreational and active transportation opportunities for thousands of people. Like the NHNCG and Merritt Parkway/Route 15 analysis, both low and high scenarios are provided for this assessment. In total, the combined corridor would receive an estimated 3.0 to 3.8 million user days each year and generate $77.9 to $132.2 million in direct annual spending. This spending would support 845 to 1,417 jobs in Connecticut and Massachusetts, earning $48.1 to $81.8 million in wages and generating $86.7 to $147.4 million in value added and $165.5 to $280.2 million in output.

For decades, these trail corridors have been envisioned, planned, and advocated for, yet they remain incomplete. Each year the trails remain unfinished represents a missed opportunity for the states of Massachusetts and Connecticut. Communities, businesses, and residents are forgoing the significant economic benefits that completed off-road trails can bring, from increased tourism and local spending to job and business growth. **Beyond the economic case outlined in this report, the states also lose out on the property value benefits and health, environmental, and quality-of-life improvements that come with safe, accessible active transportation networks.** This report also does not consider the one-time impacts from construction spending associated with builing new trail corridors.

Evidence of Property Value Impacts

While beyond the scope of this report, there is evidence that shared use paths also benefit residents and municipalities through increased property values. A 2019 study reviewed 20 research papers examining the impacts of multi-use trails on nearby property values. While there were outliers with positive premiums as high as 15 percent, the most widespread outcome for single-family homes located near a trail was a positive premium of 3 to 5 percent. These property value benefits also generate additional tax revenues for local municipalities.

Source: Crompton and Nicholls, 2019. The Impact of Greenways and Trails on Proximate Property Values: An Updated Review. https://doi.org/10.18666/JPRA-2019-9906

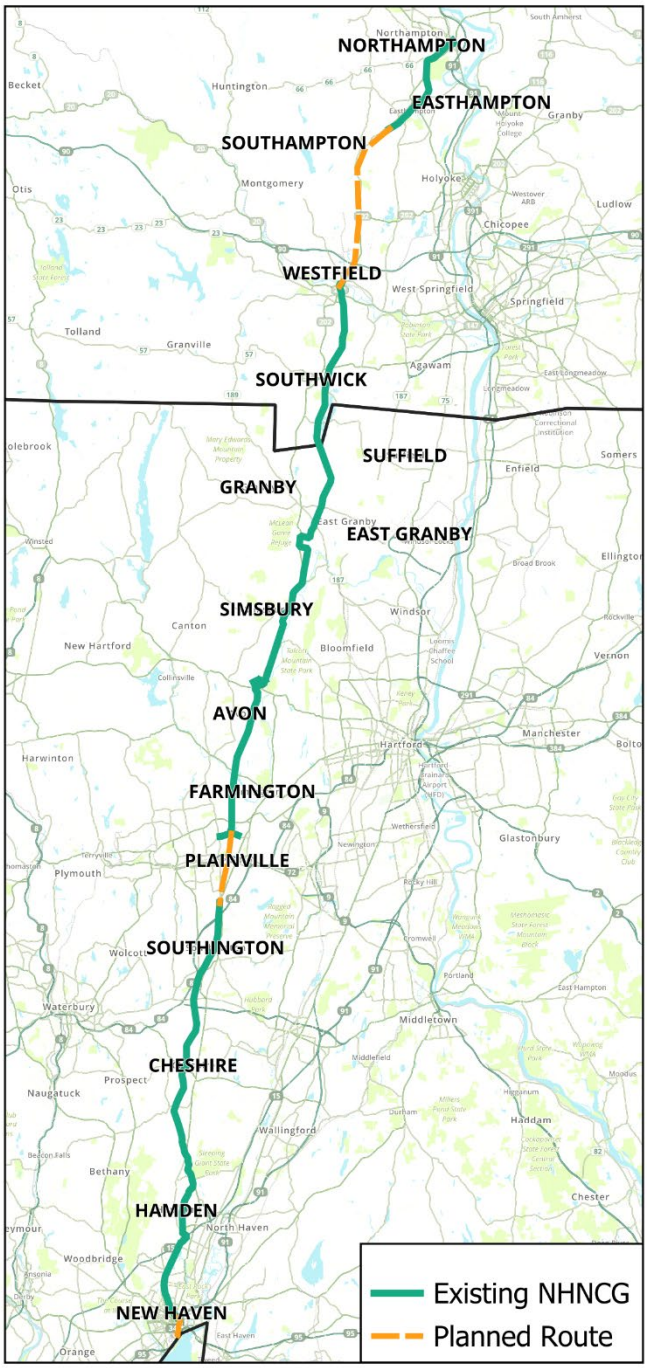
1 Overview and Introduction

The New Haven Northampton Canal Greenway (NHNCG) is an 81-mile north-south shared use path that follows the historic route of the Farmington Canal, stretching from New Haven, CT to Northampton, MA. As shown in Table 1.1, each trail segment within the corridor has its own local name familiar to many riders; however, collectively these segments are known as the NHNCG. About 65 miles of the trail have been completed (80 percent) while the remaining 16 miles are incomplete (see Figure 1.1 and Table 1.1). Current gaps in the trail include segments in Southampton, MA; parts of Westfield, MA; Plainville, CT; and parts of Southington and New Haven, CT. The Southampton/Westfield segment is slated to be completed by the early 2030s while the Plainville/Southington section has a 2030 completion date and New Haven segments should be completed in late 2026. As a result, **the entire north-south corridor is expected to be completed in about five to six years.**

The NHNCG offers multiple linkages to connecting multi-use trails, including

- Mass Central Rail Trail - A partially complete east-west rail trail stretching over 100 miles from Northampton, MA to Boston, MA along the former Massachusetts Central Railroad.
- East Coast Greenway – A semi-complete trail connecting 15 states and 450 cities and towns for 3,000 miles from Maine to Florida. The East Coast Greenway shares the same path as the NHNCG for 47 miles from New Haven to Simsbury.
- Farmington River Trail – A 17-mile combination of paved multi-use off-road sections and on-road sections, which connects to the Farmington Canal Heritage Trail section of the NHNCG at both the northern and southern ends.
- Westfield River Multi-Use Path - A 2-mile multi-use path that is currently under construction and will run along the south side of the Westfield River.[2]

Figure 1.1 Existing and Planned NHNCG Trail



Source: Cambridge Econometrics

[2] New Haven & Northampton Canal Greenway, Connecting Trails. https://sites.google.com/view/nhncg/connecting-trails

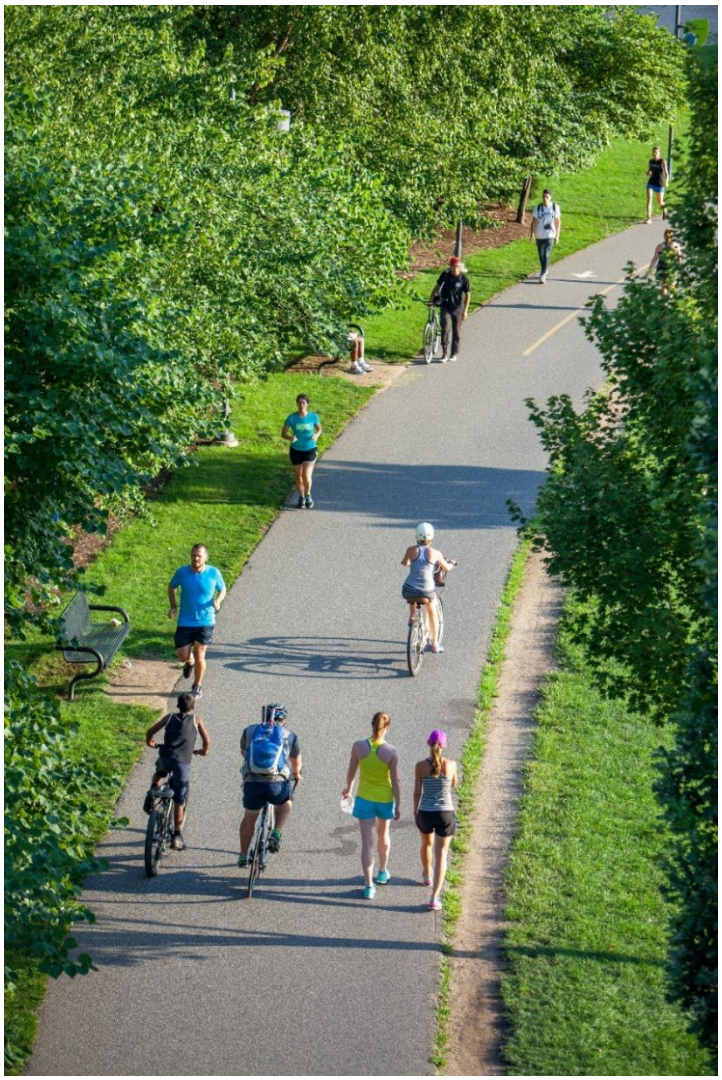
The existing NHNCG trail serves as a major recreational and transportation asset for the region, and advocates envision a continuous corridor for active transportation with connections to urban centers, neighborhoods, and natural landscapes.

Table 1.1 NHNCG Trail Segment Overview

Trail Segment	Local Trail Name	Trail Status	Total Length (miles)	Complete Length (miles)	Incomplete Length (miles)	Percent Complete
Northampton, MA	Norwottuck Rail Trail	Complete	3.5	3.5		100%
Easthampton, MA	Manhan Rail Trail	Complete	3.7	3.7		100%
Southampton, MA	Southampton Greenway	In progress	3.9	0	3.9	0%
Westfield, MA	Columbia Greenway Rail Trail	In progress	7.4	2.6	4.8	35%
Southwick, MA	Southwick Rail Trail	Complete	6.2	6.2		100%
Suffield, CT	Farmington Canal Heritage Trail	Complete	1.2	1.2		100%
Granby, CT	Farmington Canal Heritage Trail	Complete	1.1	1.1		100%
East Granby, CT	Farmington Canal Heritage Trail	Complete	5.3	5.3		100%
Simsbury, CT	Farmington Canal Heritage Trail	Complete	7.5	7.5		100%
Avon, CT	Farmington Canal Heritage Trail	Complete	4.7	4.7		100%
Farmington, CT	Farmington Canal Heritage Trail	Complete	4.8	4.8		100%
Plainville, CT	Farmington Canal Heritage Trail	In progress	5.3	0	5.3	0%
Southington, CT	Farmington Canal Heritage Trail	In progress	6.6	5.9	0.7	89%
Cheshire, CT	Farmington Canal Heritage Trail	Complete	7.1	7.1		100%
Hamden, CT	Farmington Canal Heritage Trail	Complete	9.5	9.5		100%
New Haven, CT	Farmington Canal Heritage Trail	In progress	3.4	1.9	1.5	56%
TOTAL			**81.2**	**65.0**	**16.2**	**80%**

This report assesses the economic impacts of the existing NHNCG trail corridors as well as the potential impacts of a continuous NHNCG. This study focuses on impacts associated with visitor spending and does not consider property value impacts or environmental, health, or other quality of life benefits of the trail (and thus likely understates the total impacts and benefits of the trail). The study considers direct spending impacts from trail users as well as the ripple effects of that spending throughout the bi-state Connecticut and Massachusetts economy. This analysis uses Cambridge Econometrics' (CE) REACT input-output model to assess these broader economic impacts. Three scenarios are assessed, representing:

- **Existing:** Users of the existing trail.
- **Low Scenario:** A conservative, near-term (5 years after trail completion) estimate of users at a continuous NHNCG. The timeline for the low scenario allows for the existing gaps in the NHNCG to be completed.
- **High Scenario:** A longer-term (10 to 15 years after trail completion) estimate that captures the full potential of the completed trail to attract a range of visitors through marketing campaigns (in partnership with regional tourism councils), visitor experiences, and word-of-mouth promotion. This high scenario considers the potential for new businesses to establish along the trail over time, and for the community to coordinate to create a full tourism package, like was done with the Vermont Inn to Inn Walking Tour or the Great Allegheny Passage. This scenario also captures the benefits of a NHNCG that connects to a completed 100-mile Mass Central Rail Trail connecting Northampton, MA to Boston, MA.



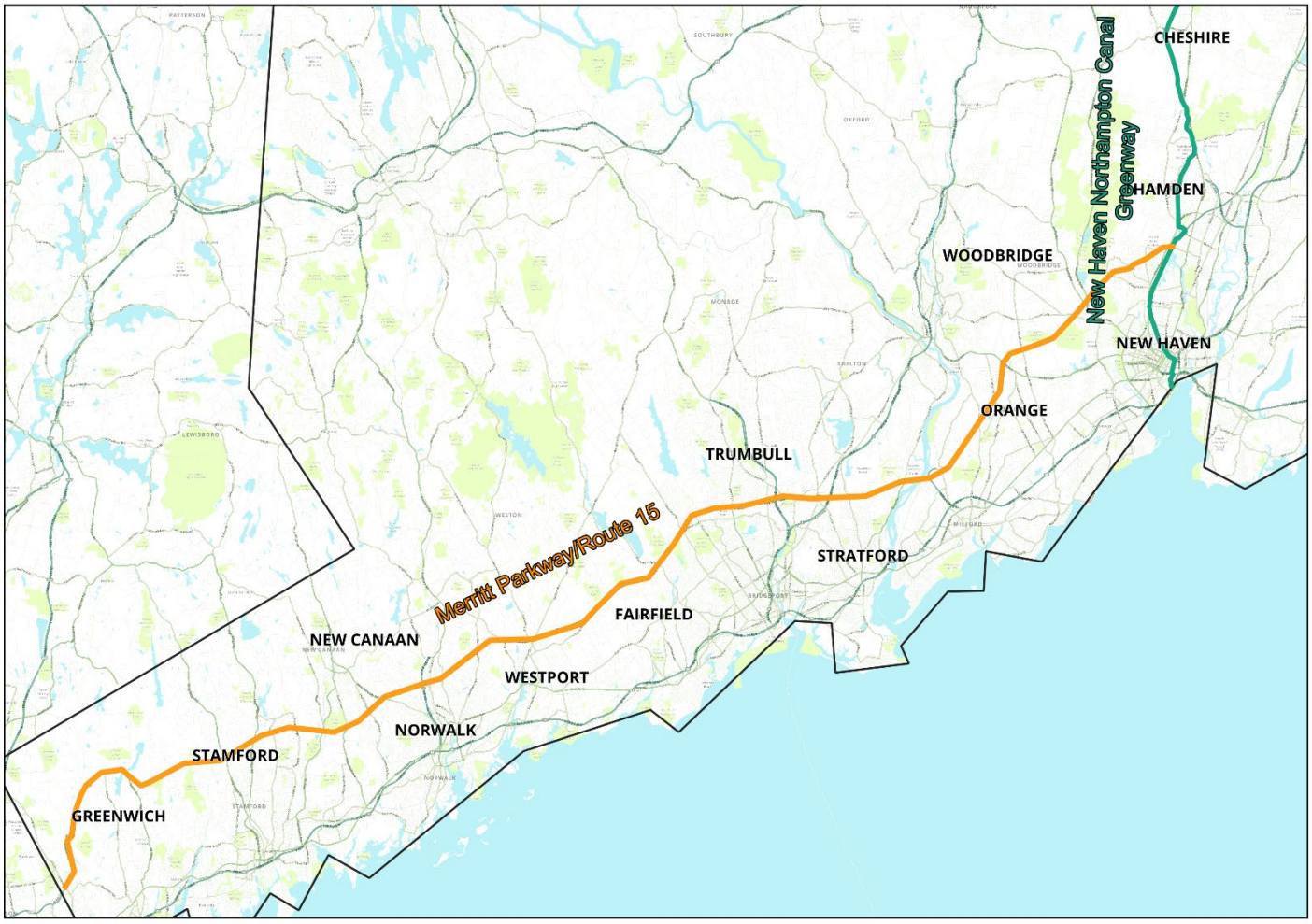
In addition to the quantitative economic impact analysis, this study also includes a qualitative assessment of the economic development impacts of the NHNCG based on interviews with five local business owners. The businesses represent a variety of industries, including bicycle repair and retail, bakery and café, and a fitness center. These short case studies are intended to help articulate how businesses directly benefit from the NHNCG through enhanced connectivity, tourism activity and consumer spending, and customer access to nearby commercial areas. Completing the 81-mile trail would further boost these business benefits, encourage more multi-day trips (and overnight stays), and provide new economic development opportunities.

In addition to the assessment of the NHNCG, this report includes an economic impact analysis of a potential 50-mile shared use path along the Merritt Parkway/Route 15 from Hamden, CT to the Connecticut-New York border in Greenwich, CT (see Figure 1.2). The Merritt Parkway, a scenic limited-access expressway, features rolling hills, dramatic rock outcrops and forests that blossom each spring. Unlike the NHNCG, this corridor does not link city and town centers and instead runs along the northern, less populated half of most of the coastal towns it traverses. While expanding this corridor to include a shared use path is still very much a conceptual idea, when the Merritt Parkway was constructed, a swath of land approximately 300 feet wide was purchased.[3] This right-of-way area is wide enough to accommodate a shared use path along the scenic roadway and would provide easy connection and recreation opportunities for residents in Greater New York City.

This right-of-way access has attracted advocates of active transportation trails for decades. In 1994, the Regional Plan Association (RPA) Connecticut Office conducted a Preliminary Feasibility Study of the Potential for Bicycle and Pedestrian Paths finding that much of the undeveloped, southerly right-of-way is suitable for a shared use trail.[4] A few years later, the group conducted another study, *Merritt Parkway Trail Demonstration Project (Landscape Study for a Proposed Bicycle and Pedestrian Path),* which details the improvements, permits, and processes necessary to build a continuous trail following the Parkway. Bringing back to life this previous work, this analysis estimates users of this potential new trail, providing a low and a high estimate to account for uncertainty of future use, and completes an economic impact analysis using REACT.

[3] Regional Planning Association https://rpa.org/work/reports/merritt-parkway-trail-study.
[4] Merritt Parkway Trail Study. 1994. https://rpa.org/work/reports/merritt-parkway-trail-study

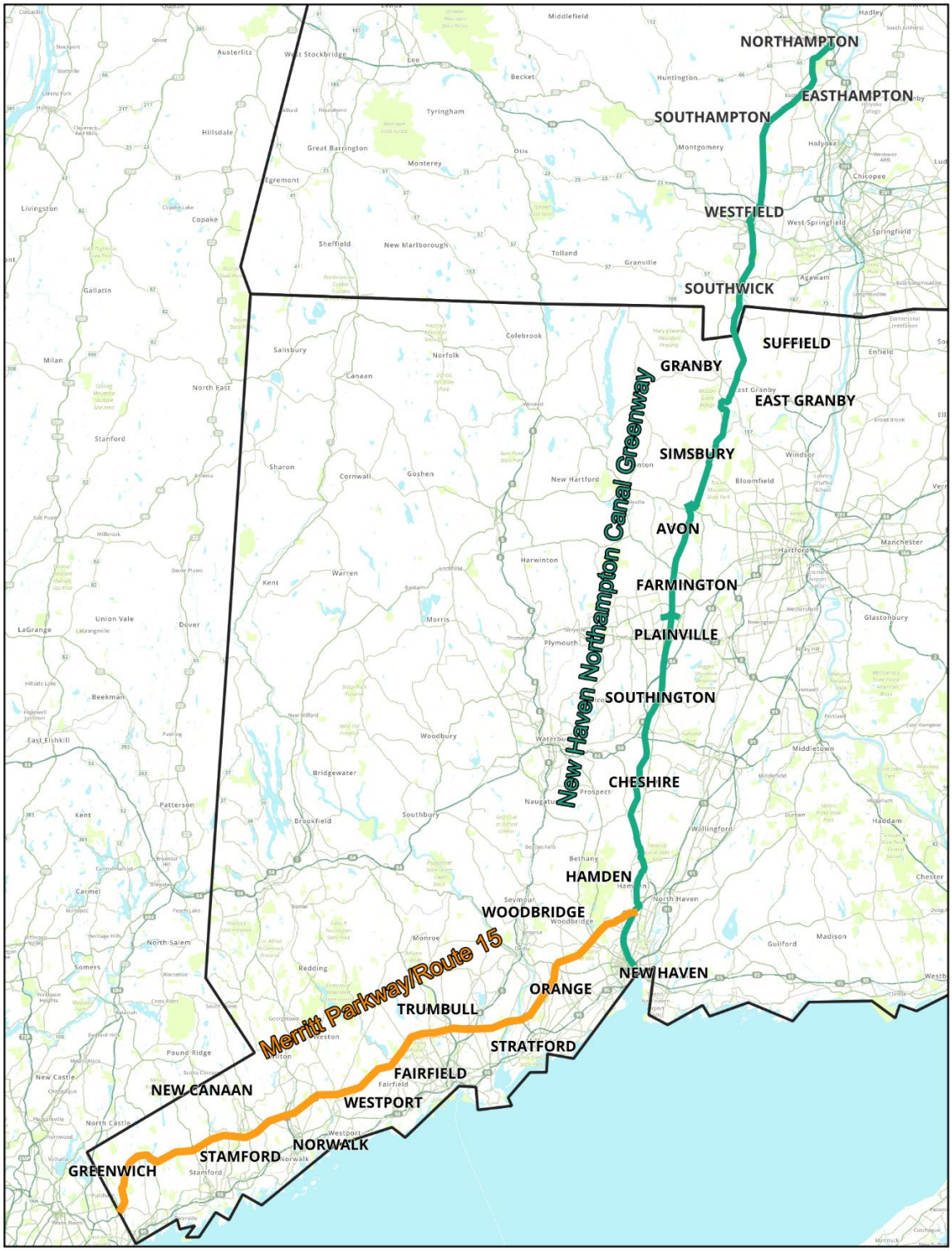
Figure 1.2 Merritt Parkway/Route 15 Map



Source: Cambridge Econometrics
Note: This map is for illustrative purposes only; the exact route of the Merritt Parkway/Route 15 corridor has not yet been determined.

To provide a complete picture of the economic potential of these trail corridors, the economic impact analysis also includes a scenario combining a continuous NHNCG with a completed Merritt Parkway/Route 15 trail. This 130-mile continuous off-road corridor would attract multi-day and overnight trips and provide new access to recreational and active transportation opportunities for thousands of people. Like the NHNCG and Merritt Parkway/Route 15 analysis, both low and high scenarios are provided for this assessment.

Figure 1.3 NHNCG and Merritt Parkway/Route 15 Map



Source: Cambridge Econometrics
Note: This map is for illustrative purposes only; the exact route of the Merritt Parkway/Route 15 corridor has not yet been determined.

2 Data and Methodology

2.1. Data

The two main data elements required for the economic impact study are:

- Number of user days per year for the trail segments
- Spending per user day for different categories of users

User days *represent the cumulative number of days that people spend on the trail within a given year*. For example, a person who uses the bike path in Easthampton, MA five days per year would count as five user days. User days are estimated based on trail counter data when available. Pedestrian and bicycle counter data were provided from Pioneer Valley Planning Commission (PVPC), Friends of the Columbia Greenway Rail Trail, and the University of Connecticut's Connecticut Trail Census. The Connecticut Trail Census was particularly informative, providing up-to-date monthly trail counter data for almost every city/town along the Connecticut segments of the NHNCG.[5] Raw counter data was adjusted down by about 40 to 50 percent to account for double counting (i.e., a biker passing the same counter twice on the same ride should only be counted once). However, this may lead to an underestimation of total trail use because some trail users make a loop and therefore do not pass the same counter twice and many trail users may never pass by a counter on their trip. This conservative assumption helps ensure the results are credible, defensible, and not overstated. Counter values from months with available data are annualized and seasonally adjusted (e.g., less usage in the winter). If no counter data are available, estimates are derived using adjacent trail segments adjusted based on town/city population. Lack of trail recent and reliable counter data for some segments of the trail, particularly in Massachusetts, was a limitation of this study.

Reliable and up-to-date trail counter data are critical to assess the use and impacts of local trails. The Connecticut Trail Census provided valuable data on trail use for a variety of locations, supporting this report and helping communities and researchers plan, maintain, and advocate for trails more effectively.

Next, the **average spending** is estimated for a typical day using the trail. In Massachusetts, these estimates are based on the 2023 Massachusetts Economic Impact of Visitors report which provides county-level visitor spending by category for Hampshire and Hampden Counties in Massachusetts. In Connecticut, the 2023 Economic Impact of Visitors in Connecticut serves as the main source for visitor spending. In both states, spending estimates are disaggregated by category, including accommodations, food, art and entertainment, retail, and transportation. Separate estimates are also provided for day and overnight user. One additional user group was also added to this analysis: local users. Spending estimates for local users are based on the MCRT Economic Impact Study,[6] which included a survey of users, and adjusted slightly for inflation and the local context. Distinguishing between these user types is important because spending profiles vary substantially across the three groups (i.e., overnight visitors spend more money and include spending on accommodation).

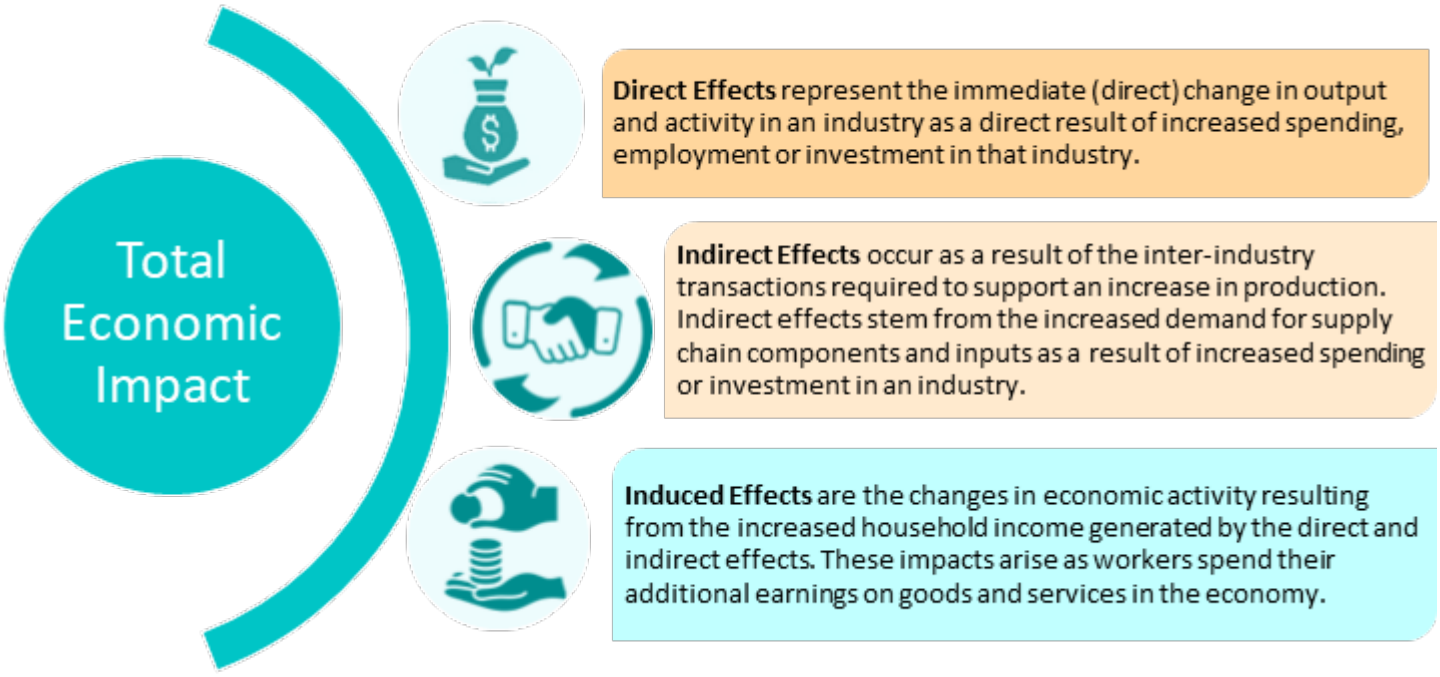
[5] Connecticut Trail Census https://cttrails.uconn.edu/ct_trail_census/.
[6] 2023 Mass Central Rail Trail Benefits Study https://www.norwottucknetwork.org/the-report.

Combining trail users with user spending, total spending estimates are computed by sector. A step-by-step overview of this estimation process and the values derived is provided in the Trail Users and User Spending section.

2.2. Economic Impact Methodology

Total trail user spending estimates by sector serve as the key inputs for the economic impact analysis. The impact analysis uses CE's REACT model to estimate the broader economic effects the NHNCG and Merritt Parkway/Route 15 shared use paths have on the Massachusetts and Connecticut economy. REACT is an input-output modeling tool that provides comprehensive and tailored quantitative assessment of how local and regional economies *react* to policy, investment, or industry activity. The model estimates direct, indirect, and induced effects (often known as multiplier effects), as described in the figure below, shedding light on the supply chain and spending impacts that ripple through the economy.

Figure 2.1 Direct, Indirect, and Induced Impacts

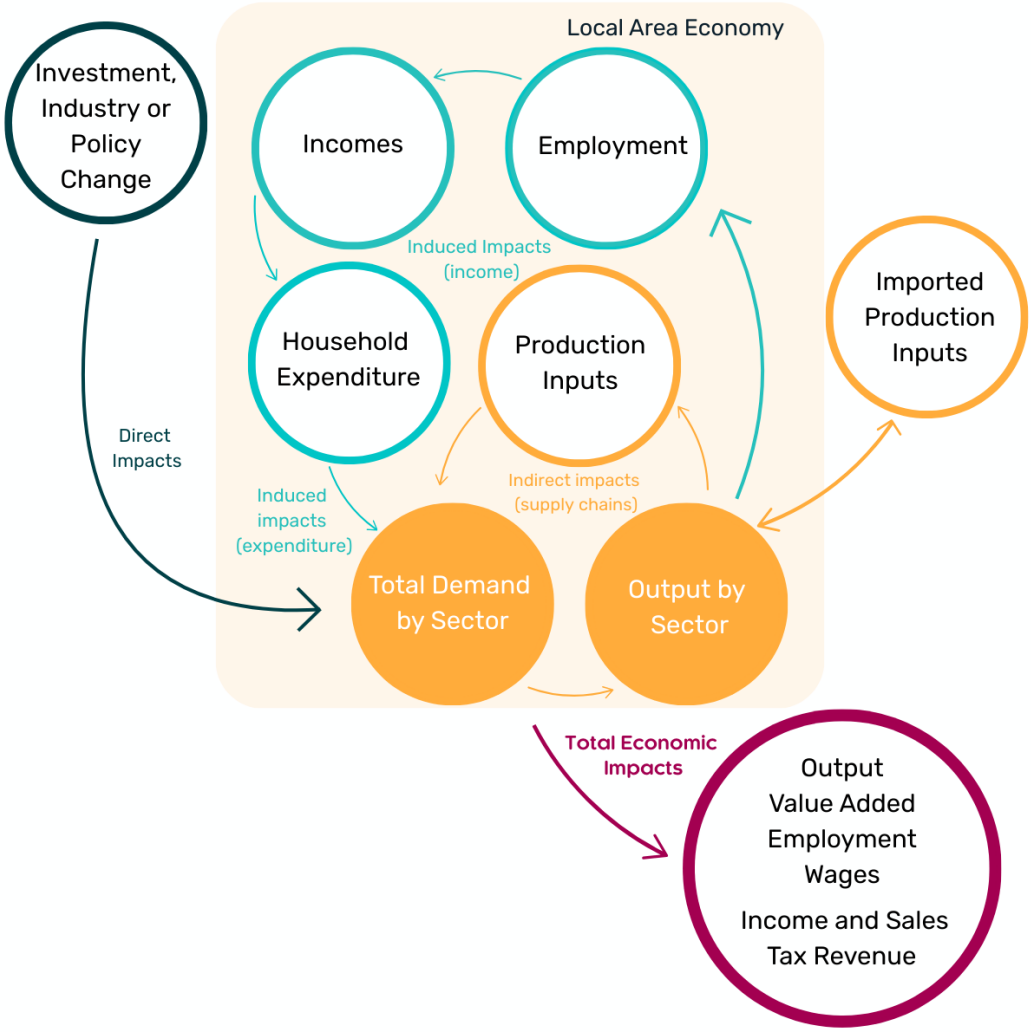


As an economic impact model, REACT is, at its core, a tool for input-output analysis, providing detail on 166 industry sectors. For any given economic activity or investment (the direct impacts), REACT generates estimates of the wider impacts, based on a sectoral depiction of a region's economy, as represented by input-output tables. These wider impacts capture:

- Local supply chains and import linkages, recognizing that local areas are rarely self-sufficient in productive capabilities, leading to region-specific *indirect* economic impacts, through those supply chains
- Employment and income, leading to *induced* economic impacts as a result of income-expenditure effects

Figure 2.2 shows the core economic logic in REACT, demonstrating how economic activity flows through the economy to produce ripple effects.[7]

Figure 2.2 REACT Model Economic Logic



To assess the economic impacts of the NHNCG and Merritt Parkway/Route 15 corridors, the process starts with spending estimates by industry sector. The derivation of these estimates is described in the Trail Users and User Spending section. Spending by industry serves as the model input and is run through the REACT model to estimate the broader economic effects that stem from the trails. In this way, the model has an integrated set of output, value added, employment, and wages by industry sector, informed and customized using Massachusetts and Connecticut data from Mass Economics Data-Fab (unsuppressed employment and wages data), the US Census Non-employer Statistics (self-employed workers), and the US Bureau of Economic Analysis (value added/GDP by industry).

[7] For more information on the REACT model and to read the technical documentation, visit https://www.camecon.com/react.

3 Trail Users and User Spending

3.1. NHNCG

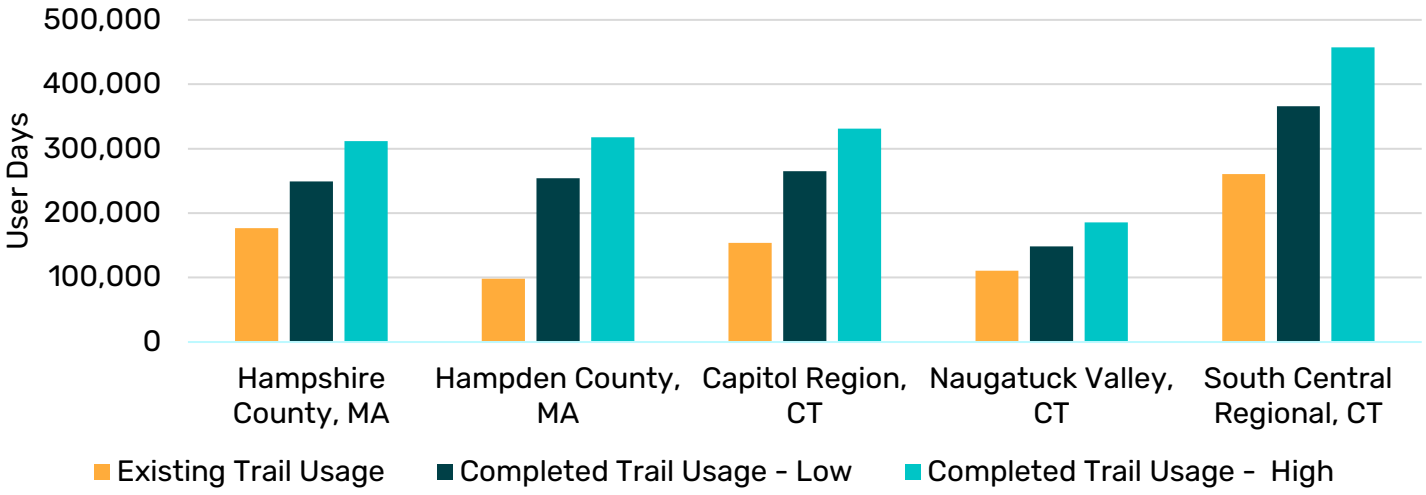
As shown in Table 3.1, the current (existing) trail segments attract an estimated **800,000 user days each year.** Two scenarios estimate trail usage for a future year with a completed/continuous NHNCG. These scenarios:

- Estimate user days at corridors that are not yet developed (e.g., Southampton and Plainville) based on nearby trail segments and local populations.
- Give existing trail segments a boost from the current user days as a result of increased connectivity and the ability to travel longer distances on the trail.

User days represent the cumulative number of days that people spend on the trail within a given year. *For example, a person who uses the bike path five days per year would count as five user days.*

The low scenario, which represents a conservative, near-term (5 years after trail completion) estimate of users at a continuous NHNCG, boosts existing user days by 20 percent. Alternatively, the longer-term (10 to 15 years after trail completion) high scenario, which captures the full potential of the completed trail to attract a range of visitors through marketing campaigns, visitor experiences, and word-of-mouth promotion, boosts existing user days by 50 percent. In total, the **low scenario estimates 1.3 million user days each year,** representing a 60 percent increase from existing user days, while the **high scenario estimates 1.6 million user days** on the NHNCG (a 100 percent increase).[8]

Figure 3.1 NHNCG User Days by Scenario and County/Planning Region



Source: Cambridge Econometrics based on trail counter data from Pioneer Valley Planning Commission (PVPC), Friends of the Columbia Greenway Rail Trail, and the Connecticut Trail Census.

[8] For context, the 2023 Mass Central Rail Trail Benefits Study estimates 1.3 million users at the current MCRT segments. https://www.norwottucknetwork.org/the-report

One other difference between the existing, low, and high scenarios is the share of user days under each user type (i.e., local user, day visitor, or overnight visitor). Distinguishing between these three types of visitors is important because each visitor type is associated with a distinct spending profile. For example, overnight visitors tend to spend more than local or day visitors, and their spending includes accommodations such as camping or hotel nights. The current trail, which has significant gaps and is not heavily advertised, is assumed to receive a small share of overnight trips (only about 1 percent of all user days, as shown in Table 3.1). Alternatively, the completed trail scenarios are assumed to receive a higher share of overnight visitors (3 percent in the low scenario and 7 percent in the high). Similarly, the share of day visitors increases when the trail is completed and more actively promoted. These assumptions are consistent with those used in the MCRT study, assessing a similar incomplete corridor.[9]

Table 3.1 Share and Number of User Days by User Type

Visitor type	Share of User Days			Total User Days		
	Existing Trail	Completed Trail - Low	Completed Trail - High	Existing Trail	Completed Trail - Low	Completed Trail - High
Overnight Visitors	1.0%	3.0%	7.0%	8,000	38,500	112,200
Day Visitors	10.0%	12.5%	15.0%	80,000	160,300	240,500
Local Users	89.0%	84.5%	78.0%	712,200	1,083,900	1,250,700
TOTAL	**100.0%**	**100.0%**	**100.0%**	**800,200**	**1,282,700**	**1,603,400**

The next step in the economic analysis is to estimate the average amount spent per user day for each of the different user types. These spending data are based on the 2023 Massachusetts Economic Impact of Visitors and 2023 Economic Impact of Visitors in Connecticut reports. As shown in Figure 3.2, overnight visitors spend substantially more than day or local users, largely due to spending on accommodations, which has an average cost per person per day of $50.[10] In total, overnight visitors spend an estimated $154 per day while day visitors spend $93 and local visitors spend about $9 per day on the trail.

The Three NHNCG Scenarios

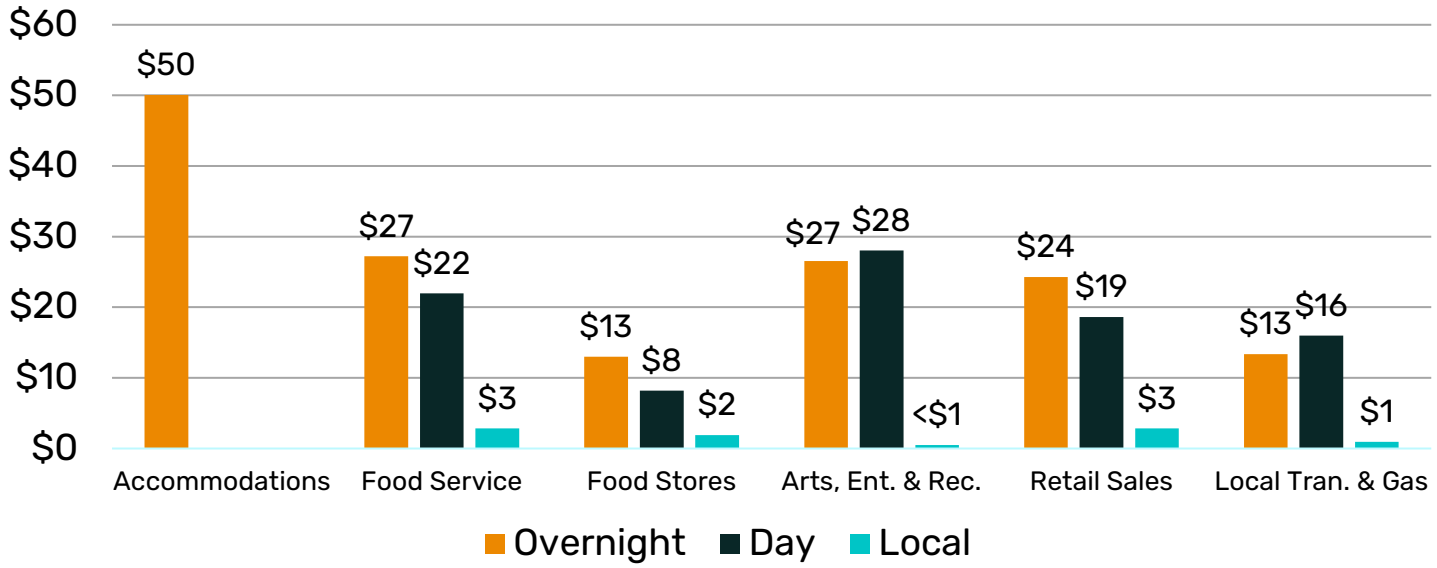
Existing: Users of the existing trail segments

Low Scenario: A conservative, near-term (5 years after trail completion) estimate of users at a continuous NHNCG

High Scenario: A longer-term (10 to 15 years after trail completion) estimate that captures the full potential of the completed trail to attract a range of visitors, and also captures the benefits of a NHNCG that connects to a completed 100-mile

[9] 2023 Mass Central Rail Trail Benefits Study https://www.norwottucknetwork.org/the-report.
[10] This estimate includes all accommodation types, including hotels, rentals, and camping. Because it is a per-day estimate, a single person on a one-night/two-day trip would spend an estimated $100.

Figure 3.2 Spending per User Day by Spending Category



Source: Cambridge Econometrics spending data from 2023 Massachusetts Economic Impact of Visitors and the 2023 Economic Impact of Visitors in Connecticut reports.

Multiplying these spending profiles by the corresponding number of user days yields the total spending by NHNCG users, as shown in Table 3.2. **In total, users to the existing trail segments are estimated to spend $15.1 million per year in Massachusetts and Connecticut,** including $4.0 million on food services and $3.7 million on retail. **If the NHNCG trail were completed, the states could expect between $32.0 million and $53.8 million in total spending by trail users (an increase of $17.0 million to $38.7 million as compared to the existing trail).**

Table 3.2 Spending by NHNCG Users by Spending Category

Spending Category	Existing Trail	Completed Trail - Low	Completed Trail - High
Accommodations	$400,500	$2,092,400	$6,102,900
Food Service	$3,999,100	$7,822,600	$12,303,700
Food Stores	$2,110,200	$3,891,900	$5,924,000
Arts, Entertainment & Recreation	$2,793,500	$6,545,600	$11,120,100
Retail Sales	$3,706,400	$7,334,400	$11,422,700
Local Transit & Gas	$2,061,200	$4,357,400	$6,943,300
TOTAL	**$15,071,000**	**$32,044,300**	**$53,816,700**

Source: Cambridge Econometrics based on trail counter data from Pioneer Valley Planning Commission (PVPC), Friends of the Columbia Greenway Rail Trail, and the Connecticut Trail Census and spending data from 2023 Massachusetts Economic Impact of Visitors and the 2023 Economic Impact of Visitors in Connecticut reports.

These direct spending estimates by industry serve as the key input to the REACT model for the NHNCG economic impact analysis. The results of that assessment are described in the next chapter.

3.2. Merritt Parkway/Route 15

The Merritt Parkway/Route 15 corridor does not currently include a shared use path. As such, the estimation of users for a potential future path in this potential corridor is all derived from data on the NHNCG user days per local resident. The NHNCG user days per town resident is applied to residents in towns along the Merritt Parkway/Route 15 corridor for both the low and high scenario (corresponding to the low and high NHNCG scenarios user days per local resident). While an imperfect estimation technique, it is the best available given the high level of uncertainty around future use of a trail corridor that does not yet exist. These estimates are built around the assumption that the NHNCG trail is completed. Multiple factors could lead to higher or lower per person trail use along this corridor and this method balances some of these factors. For example, these Merritt Parkway/Route 15 user days estimates could be:

The Two Merrit Parkway/Route 15 Scenarios

Low Scenario: A conservative, 5-year post completion estimate of users of a Merritt Parkway/Route 15 shared use trail connecting to a completed NHNCG

High Scenario: A longer-term (15+ year) estimate that captures the full potential of the trail to attract a range of visitors through marketing campaigns, visitor experiences, and word-of-mouth promotion

- Overestimates, because the Merritt Parkway/Route 15 does not connect city/town centers in the same way as the NHNCG which would lower trail use.
- Underestimates, because they do not explicitly consider the close proximity of large population centers including New York City, NY (population 8.5 million) which is within an hour drive of the trail and Bridgeport, CT (population 152,000) which is just south of the corridor (and Connecticut's largest city).

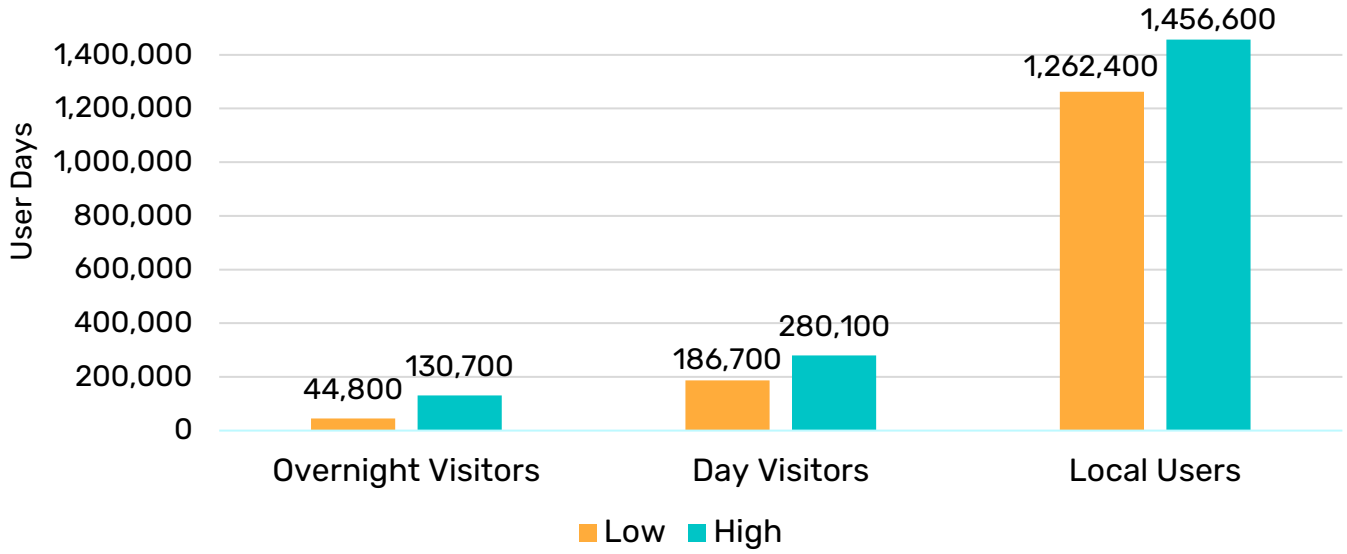
As shown in Table 3.4, **if the Merritt Parkway/Route 15 corridor were constructed as a shared use path, it could attract an estimated 1.4 to 1.9 million user days each year.**

Table 3.3 Merritt Parkway/Route 15 User Days by Scenario

CT Planning Region	Trail Usage - Low	Trail Usage - High
South Central Regional	199,600	249,500
Greater Bridgeport/Metropolitan	400,700	500,900
Western CT	893,700	1,117,100
TOTAL	**1,494,000**	**1,867,500**

The same portion of local, day, and overnight visitors as the NHNCG low and high scenarios is assumed for this corridor, leading to a total of 45,000 to 131,000 overnight user days, 187,000 to 280,000 day user days, and 1.3 million to 1.5 million local user days each year.

Figure 3.3 Merritt Parkway/Route 15 User Days by User Type



Like the NHNCG, the user days by user type are multiplied by the corresponding spending profiles to estimate total spending by Merritt Parkway/Route 15 trail users. [11] **In total, the trail is estimated to support $37.3 to $61.0 million in annual spending.** Given the limited number of existing restaurants, cafes, retail shops, and other businesses along the existing corridor, these longer-term scenarios assume increased business activity along the trail and a more complete tourism package, including inns, hotels, and campsites, restaurants, cafes, retail, entertainment and more.

Table 3.4 Spending by Merritt Parkway/Route 15 Trail Users by Spending Category

Spending Category	Low	High
Accommodations	$2,134,900	$6,226,900
Food Service	$9,291,600	$14,090,100
Food Stores	$4,919,400	$7,120,000
Arts, Ent. & Rec.	$8,023,100	$13,891,900
Retail Sales	$8,186,600	$12,119,800
Local Tran. & Gas	$4,712,300	$7,576,300
TOTAL	**$37,267,900**	**$61,025,000**

Source: Cambridge Econometrics based on spending data the 2023 Economic Impact of Visitors in Connecticut report and 2023 US Census ACS Median Household Income.

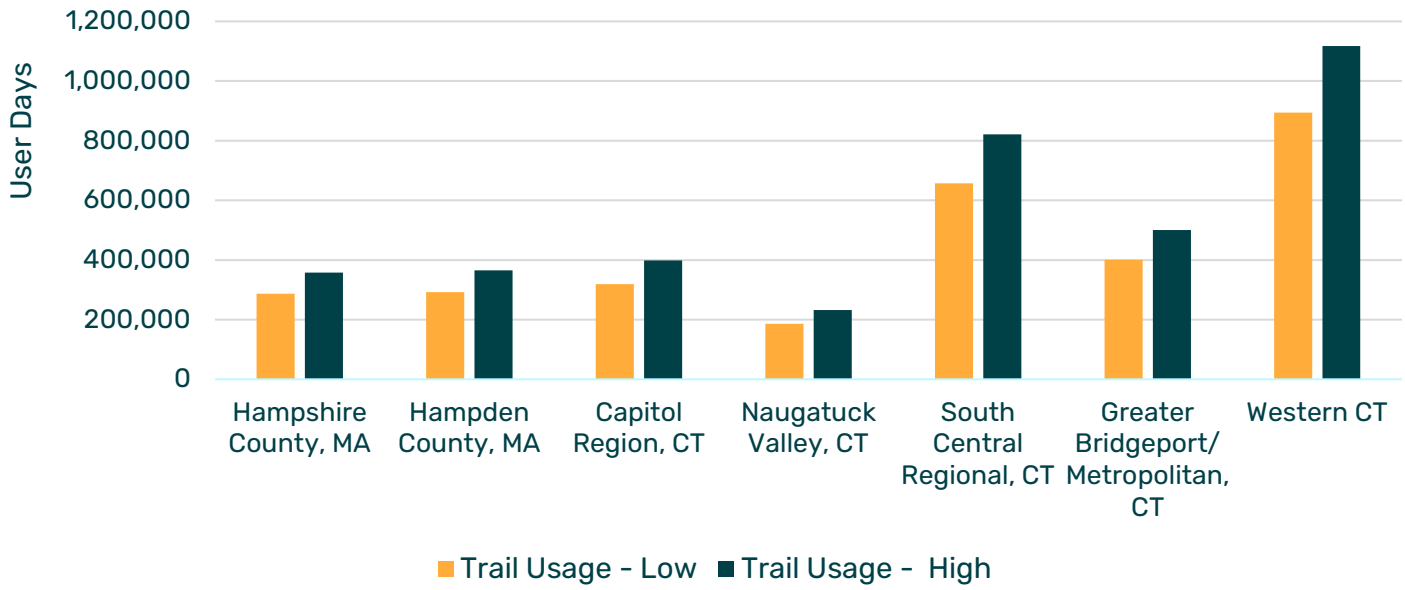
[11] To account for the relatively wealthy population living in the towns surrounding the corridor in the Western Connecticut Planning Region (formerly Fairfield County), the Connecticut spending profile from the 2023 Economic Impact of Visitors in Connecticut reports was adjusted (increased) slightly for that county. This adjustment was based on the median household income in that county compared to the state.

These direct spending estimates by industry serve as the key input to the REACT model for the Merritt Parkway/Route 15 shared use path economic impact analysis. The results of that assessment are described in the next chapter.

3.3. Combined NHNCG and Merritt Parkway/Route 15

The combined NHNCG and Merritt Parkway/Route 15 scenarios take the user days from the NHNCG and Merritt Parkway/Route 15 high and low scenarios and combine them into one continuous corridor analysis. Because the Merritt Parkway/Route 15 analysis already assumes the NHNCG corridor is completed, the user estimates for that segment do not change. To account for a longer (130-mile) continuous trail corridor, the NHNCG user day estimates are estimated to receive a modest boost. For the northern NHNCG trail segments from Northampton, MA to Avon, CT, user days are assumed to increase by 15 percent. The southern portion of the NHNCG from Farmington to New Haven, CT is assumed to see a larger increase (25 percent) because it is closer to the Merritt Parkway/Route 15 intersection. **In total, the combined corridor could receive an estimated 3.0 to 3.8 million user days each year.**

Figure 3.4 Combined NHNCG and Merritt Parkway/Route 15 User Days by Scenario and County/Planning Region



Source: Cambridge Econometrics based on trail counter data from Pioneer Valley Planning Commission (PVPC), Friends of the Columbia Greenway Rail Trail, and the Connecticut Trail Census.

Because the continuous combined trail would span over 130 miles, there would be more opportunity for overnight trips. An estimated 5 to 10 percent of user days would be overnight visits (compared to 3 to 7 percent for the NHNCG trail scenarios), leading to a total of 152,000 to 379,000 overnight user days (see Table 3.5). As discussed, overnight users spend substantially more than day or local visitors and therefore have a relatively large economic impact.

Table 3.5 Share and Number of User Days by User Type

Visitor type	Share of User Days		Total User Days	
	Low	High	Low	High
Overnight Visitors	5%	10%	151,800	379,400
Day Visitors	10%	12%	303,500	455,300
Local Users	85%	78%	2,579,900	2,959,300
TOTAL	**100%**	**100%**	**3,035,200**	**3,794,000**

In total, the 3.0 to 3.8 million users days would lead to $77.9 to $132.2 million in annual spending, as shown in Table 3.6. These user spending estimates by spending category serve as the key inputs to the REACT model.

Table 3.6 Spending by NHNCH and Merritt Parkway/Route 15 Combined Trail Users by Spending Category

Spending Category	Low	High
Accommodations	$7,712,100	$19,280,400
Food Service	$18,618,000	$29,283,300
Food Stores	$9,697,300	$14,611,400
Arts, Ent. & Rec.	$15,328,800	$27,093,900
Retail Sales	$16,945,500	$26,190,900
Local Tran. & Gas	$9,603,700	$15,710,900
TOTAL	**$77,905,400**	**$132,170,700**

Bike Trail Marketing and Promotion – Attracting Visitors

Marketing, promotion, and user-friendly travel packages are essential to realize the full economic development potential of a long-distance multi-use trail. As noted throughout this report, the largest economic impact of trail users comes from out-of-town visitors, in particular visits that include overnight stays with more substantial spending on food, restaurants, retail, and accommodations (hotels, inns, campsites). There are many examples of how bike and longer-distance shared use paths can be marketed and promoted, but a successful campaign generally consists of both a strong website and social media presence, along with organized and easily searchable travel packages. Sometimes known as inn to inn, these trips allow visitors to bike the trail for multiple days with organized overnight stays at inns near the trail and travel logistics to safely move their luggage. Successful examples from the US and Europe include:

Great Allegheny Passage and C&O Canal Towpath

Two of the most popular and frequently visited long-distance shared use paths (with emphasis on cycling) are located in Pennsylvania and Maryland. The Great Allegheny Passage is a 150-mile trail that connects from Cumberland, MD to Pittsburgh, PA and is estimated to generate roughly $120 million per year in economic impacts. The C&O Canal Towpath is a 184-mile long trail from Washington, DC to Cumberland, MD (thus connecting with the Allegheny Passage). Both of these trails have impressive websites highlighting things to do along the trail, historic landmarks, places to stay, resources to plan a trip, etc. For example, the Allegheny Passage has identified Trail Towns to help facilitate visits and multi-day trips.

Vermont Inn to Inn Bicycling and Hiking

As a New England example, websites and travel companies support and organize multi-day cycling and hiking/walking trips in Vermont. Leveraging the state's stunning scenery, charming small towns, and large number of inns and bed & breakfasts (B&B), these services are great examples of promotion with overnight accommodations, custom trips and maps, travel logistics, luggage services, and dining options.

United Kingdom (UK) and European Inn to Inn Bicycling Trips

The UK and Europe are leaders at organizing and promoting multi-day bicycle trips for vacations and tourism. Locations like the UK and Italy have many cycling-focused vacation options that are geared towards combining bicycling, scenery, and tourism (hotels, restaurants, shopping, etc.) Currently, companies with a significant presence in the US, do not advertise cycling tour trips in Massachusetts or Connecticut, creating an opportunity for the NHNCG moving forward.

The tourist packages and scale of services highlighted here are currently not available in Massachusetts or Connecticut and represent a tangible opportunity stemming from a continuous trail system.

4 Economic Impacts

The direct economic activity and spending by trail users have a ripple effect through the Massachusetts and Connecticut economies deriving from supply chain activities (indirect) and increased household income (induced). This chapter outlines the total economic impact associated with user spending at the NHNCG, Merritt Parkway/Route 15 corridor trail, and a combined continuous trail.

4.1. NHNCG

As discussed above, in addition to the existing NHNCG trail analysis, a low and high range of spending estimates and impacts are provided due to uncertainty about future trail use. The current direct spending at the existing NHNCG trail segments totals $15.1 million while the low and high scenarios total $32.0 and $53.8 million, respectively. As show in Table 4.1, economic impacts include:

- Direct spending at the **existing NHNCG trail** supports 166 jobs that pay $9.3 million in earnings and generate $16.7 million in value added and $32.1 million in total output.
- **A continuous/completed NHNCG** could support 351 to 582 jobs, earning $20.0 to $33.5 million in wages and generating $35.7 to $60.0 million in value added and $68.4 to $114.4 million in output.

Table 4.1 Economic Impacts of the NHNCG to Massachusetts and Connecticut

	Direct Economic Activity	Indirect Impact	Induced Impact	Total Impact
Existing				
Employment	113	22	31	**166**
Earnings (millions)	$4.82	$2.07	$2.37	**$9.27**
Value Added (millions)	$7.93	$4.21	$4.58	**$16.71**
Output (millions)	$15.07	$7.58	$9.49	**$32.14**
Low				
Employment	238	46	67	**351**
Earnings (millions)	$10.47	$4.42	$5.08	**$19.96**
Value Added (millions)	$17.02	$8.88	$9.80	**$35.70**
Output (millions)	$32.04	$16.01	$20.32	**$68.37**
High				
Employment	393	77	112	**582**
Earnings (millions)	$17.57	$7.39	$8.50	**$33.46**
Value Added (millions)	$28.87	$14.75	$16.39	**$60.02**
Output (millions)	$53.82	$26.63	$33.99	**$114.44**

Source: Cambridge Econometrics' REACT model

These economic impacts include both Massachusetts and Connecticut as one combined region. REACT was also run for each individual state to evaluate the distribution of impacts between the two. It is important to note, however, that *the combined Massachusetts-Connecticut region is greater than the sum of the Massachusetts and Connecticut individual results because it captures interstate trade and supply-chain linkages (i.e., the goods, services, and labor that flow between the two states) which generate additional rounds of spending and economic activity that aren't counted when each state is analyzed separately.*

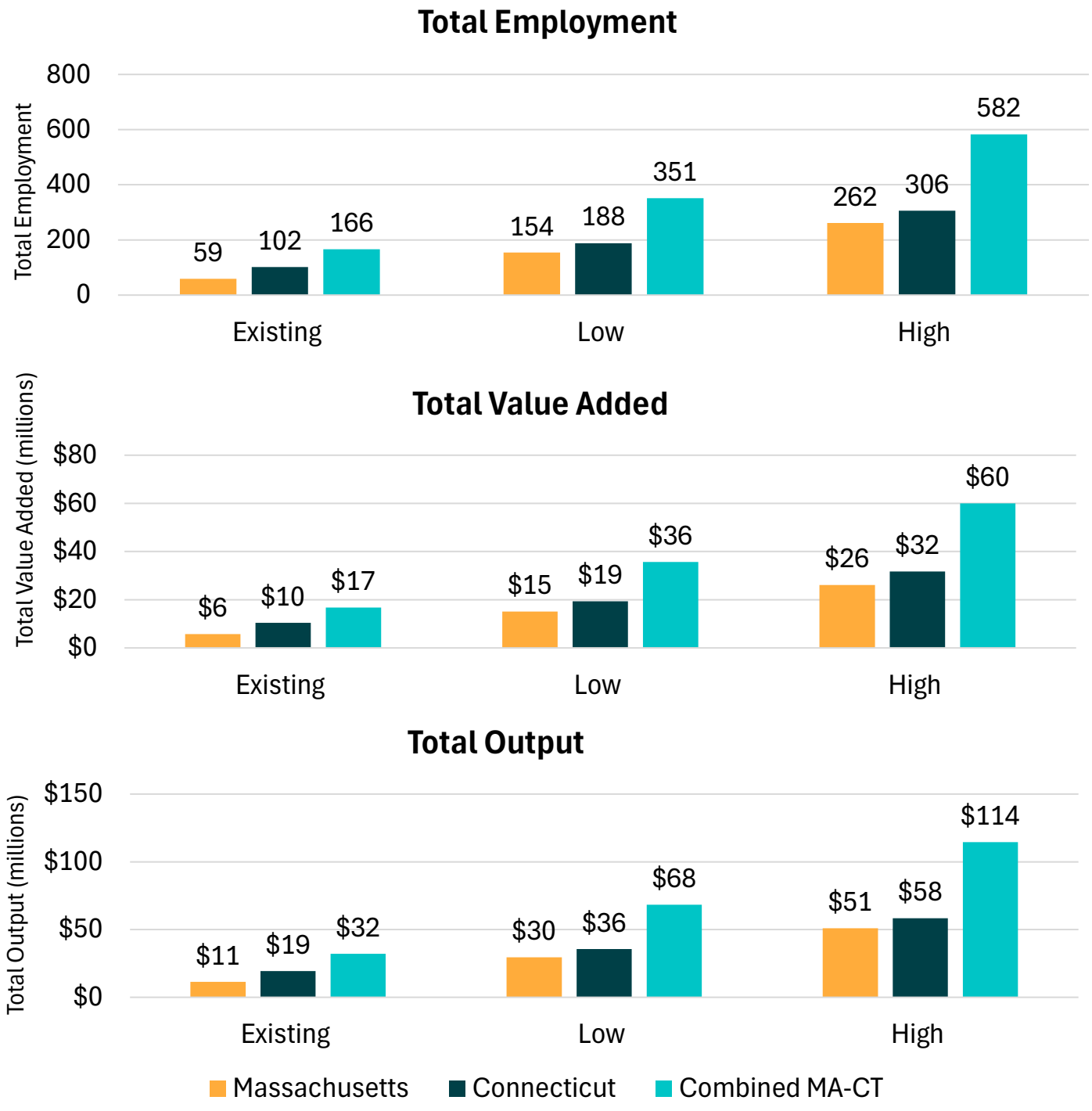
As shown in Figure 4.1 Connecticut, which contains the majority of the trail, has relatively larger economic impacts than Massachusetts, particularly for the existing trail corridor.

- **The current trail** corridor supports 102 jobs in **Connecticut** that pay $5.3 million in wages and generate $10.4 million in value added and $19.3 million in output.
- **A completed trail** would supports 188 to 306 jobs in **Connecticut** that pay $9.9 to $16.3 million in wages and generate $19.3 to $31.7 million in value added and $35.7 to $58.3 million in output.

Alternatively, Massachusetts makes up just over a third of the total economic impact of the current NHNCG. While completing the trail would increase the economic impacts to both states, Massachusetts would experience a larger increase, accounting for over 40 percent of the economic impacts of a completed trail.

- **The current trail** corridor supports 59 jobs in **Massachusetts** that pay $3.3 million in wages and generate $5.7 million in value added and $11.3 million in output.
- **A completed trail** would supports 154 to 262 jobs in **Massachusetts** that pay $8.7 to $14.9 million in wages and generate $15.1 to $26.1 million in value added and $29.6 to $50.9 million in output.

Figure 4.1 NHNCG Economic Impacts by State



Source: Cambridge Econometrics' REACT model
Note: The Combined MA-CT region is greater than the sum of the Massachusetts and Connecticut individual results because it captures interstate trade and supply-chain linkages (i.e., the goods, services, and labor that flow between the two states) which generate additional rounds of spending and economic activity that aren't counted when each state is analyzed separately.

Completing the NHNCG would enhance the economic impact of the trail by:

- Encouraging longer distance and multi-day trips
- Making new corridors available for use
- Providing additional opportunities for economic development along the trail as the region develops a more complete tourist package centered around active transportation

Table 4.2 reflects the economic impacts of these additional benefits, showing the change in outcomes compared to the existing trail impacts. Completing the trail is estimated to increase employment by 185 to 416 workers in Massachusetts and Connecticut, paying $10.7 to $24.2 million in additional wages and generating an additional $19.0 to $43.3 million in value added and $36.2 to $82.3 million in output.

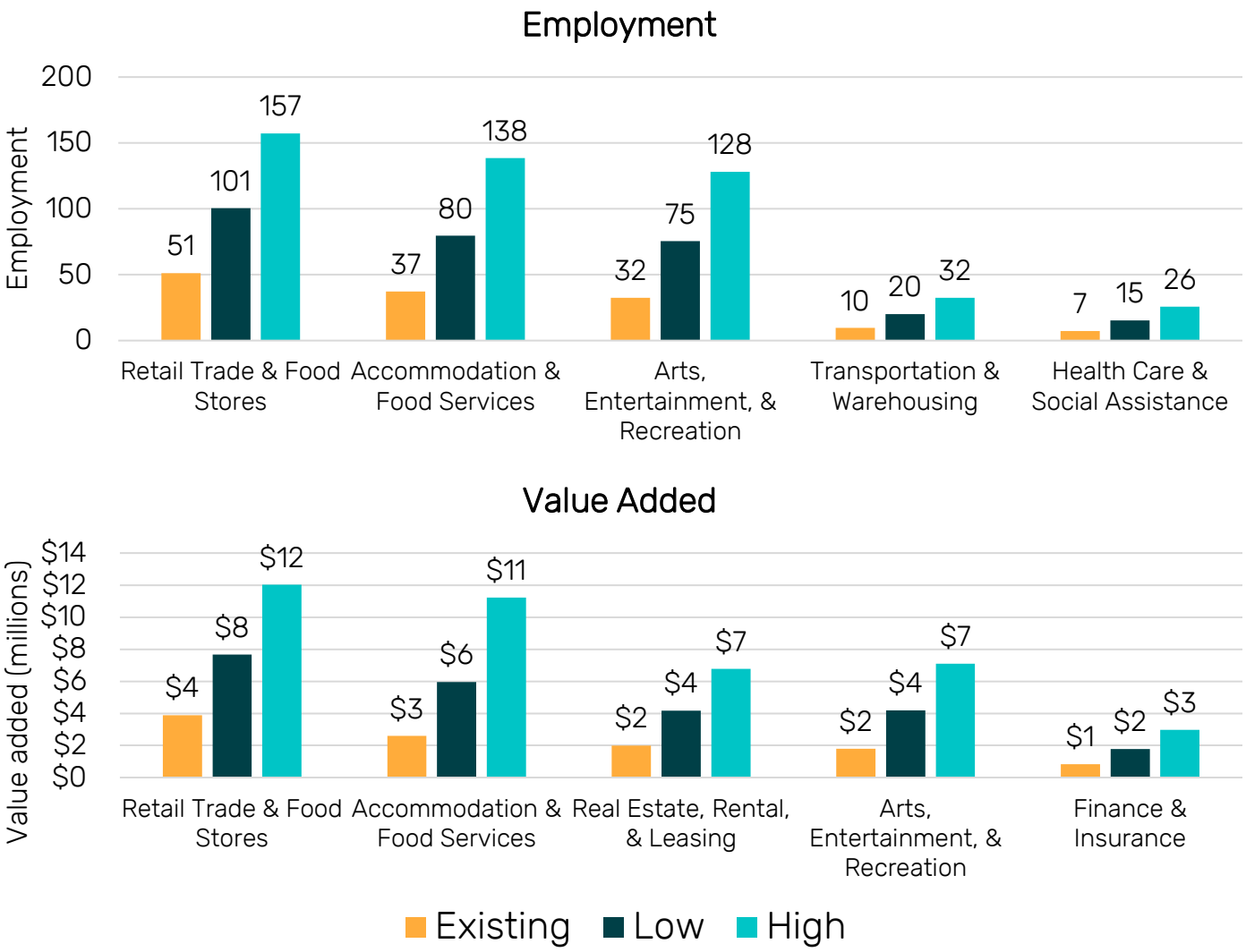
Table 4.2 NHNCG Economic Impacts - Change from Existing

	Direct Economic Activity	Indirect Impact	Induced Impact	Total Impact
Low				
Employment	125	24	36	**185**
Earnings (millions)	$5.65	$2.35	$2.71	**$10.70**
Value Added (millions)	$9.09	$4.67	$5.22	**$18.99**
Output (millions)	$16.97	$8.43	$10.83	**$36.23**
High				
Employment	280	55	81	**416**
Earnings (millions)	$12.74	$5.32	$6.13	**$24.19**
Value Added (millions)	$20.94	$10.54	$11.82	**$43.30**
Output (millions)	$38.75	$19.05	$24.50	**$82.30**

Source: Cambridge Econometrics' REACT model

As shown in Figure 4.2, the retail (including food stores) sector accounts for the most jobs and value added in each scenario, followed by accommodation and food services. These impacts, along with impacts in the transportation and arts, entertainment, and recreation sector, are driven by the high direct spending in these industries. At the same time, additional jobs would be created in the health care and social assistance industry as a result of indirect and induced impacts. In terms of value added, indirect and induced impacts are strong in the real estate and finance and insurance sectors.

Figure 4.2 NHNCG Total Jobs and Value Added Impacts by Top Five Industries



Source: Cambridge Econometrics' REACT model

4.2. Merritt Parkway/Route 15

The Merritt Parkway/Route 15 corridor analysis of a potential shared use path also includes a low and high range of spending estimates and impacts due to uncertainty about future trail use. The direct spending at the Merritt Parkway/Route 15 corridor is estimated to total $51.1 to $77.0 million. As show in Table 4.3, this direct spending would support **396 to 643 jobs in Connecticut earning $20.9 to $34.3 million in wages and generating $40.7 to $66.6 million in value added and $75.1 to $122.7 million in output.**

Table 4.3 Economic Impacts of the Merrit Parkway/Route 15 Corridor to Connecticut

	Direct Economic Activity	Indirect Impact	Induced Impact	Total Impact
Low				
Employment	276	49	71	**396**
Earnings (millions)	$11.24	$4.48	$5.18	**$20.90**
Value Added (millions)	$20.82	$9.46	$10.41	**$40.69**
Output (millions)	$37.27	$16.67	$21.12	**$75.06**
High				
Employment	446	80	117	**643**
Earnings (millions)	$18.49	$7.34	$8.48	**$34.31**
Value Added (millions)	$34.23	$15.35	$17.04	**$66.63**
Output (millions)	$61.02	$27.08	$34.57	**$122.67**

Source: Cambridge Econometrics' REACT model

4.3. Combined NHNCG and Merritt Parkway/Route 15

Combining a completed NHNCG with a Merritt Parkway/Route 15 shared use path corridor would enhance the economic impacts of both trail segments. The 130-mile continuous path could attract an estimated 3.0 to 3.8 million user days each year, generating $104.9 to $163.2 million in direct spending. This direct spending would support **845 to 1,417 jobs in Connecticut and Massachusetts earning $48.1 to $81.8 million in wages and generating $86.7 to $147.4 million in value added and $165.5 to $280.2 million in output.**

Table 4.4 Economic Impacts of the Combined NHNCG and Merrit Parkway/Route 15 Corridor to Massachusetts and Connecticut

	Direct Economic Activity	Indirect Impact	Induced Impact	Total Impact
Low				
Employment	572	111	161	**845**
Earnings (millions)	$25.15	$10.66	$12.25	**$48.06**
Value Added (millions)	$41.65	$21.39	$23.63	**$86.66**
Output (millions)	$77.91	$38.61	$48.99	**$165.51**
High				
Employment	955	188	274	**1,417**
Earnings (millions)	$42.96	$18.06	$20.78	**$81.80**
Value Added (millions)	$71.37	$35.93	$40.08	**$147.38**
Output (millions)	$132.17	$64.94	$83.09	**$280.20**

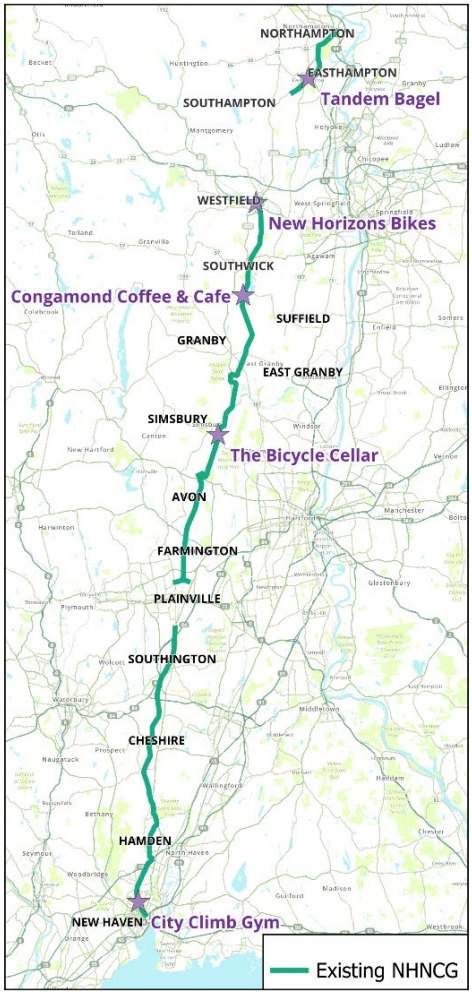
Source: Cambridge Econometrics' REACT model

5 NHNCG Business Impacts

In addition to the quantitative analysis of economic impacts discussed above, this study also includes brief case studies of local businesses along the existing NHNCG corridors. Informed by interviews with each business, the profiled businesses include:

- Tandem Bagel in Easthampton, MA
- New Horizons Bikes in Westfield, MA
- Congamond Coffee and Café in Southwick, MA
- The Bicycle Cellar in Simsbury, CT
- City Climb Gym in New Haven, CT

Each of these businesses, along with countless others, benefit from the existing NHNCG corridors that pass by their respective establishments and could benefit from additional visitors as a result of a continuous/completed trail.



Source: Cambridge Econometrics

5.1. Tandem Bagel, Easthampton, MA

Tandem Bagel is a Western Mass favorite serving bagels, bagel sandwiches, coffee, and more. The company's flagship location is located in a refurbished railroad depot on the Manhan Trail (also part of the NHNCG) in Easthampton, MA. The company has since expanded to locations all around Western Massachusetts, including Hadley, Northampton, Florence, West Springfield, and Ludlow. True to their bike-inspired name, each of these business locations is accessible via a shared use path, though the original Easthampton location attracts the most customers via bike or walking.

Photo provided by Tandem Bagel

With about 25 employees at each location, Tandem Bagel employs a total of about 160 employees. Owner Chris Zawacki conservatively estimates that during the week, about 5 people come into the Easthampton location via the trail each day, whereas on the weekend that number increases to 10 to 15 people per day. With an average ticket of about $10 per person, that leads to **thousands of dollars per month in revenue for the business, particularly during the months of April through October.**

If the NHNCG were completed, and particularly the missing segments in Southampton and Westfield, Tandem Bagel staff expect to see more local and family bike rides that include a stop at the Easthampton location as well as more long-distance bike groups stopping in.

Photo provided by Tandem Bagel

5.2. New Horizons Bikes, Westfield, MA

New Horizons Bikes has been located at the same location in Westfield, MA since 1984. The shop is situated in downtown Westfield about two blocks away from the local segment of the NHNCG, called the Columbia Greenway Rail Trail. While the nearby trail segment did not exist when New Horizons selected its location, owner Don Podolski was an advocate of the trail and a member of a business association group promoting the rail trail reuse and founder of the local Friends of the Rail Trail advocacy group. Podolski's daughter manages the shop as he eases into retirement and will continue its legacy after he leaves.

The shop sells a variety of bicycles, including mountain bikes, road bikes, custom builds, kids' bikes, and e-bikes as well as clothing and accessories. The location also does bicycle repairs and bike rentals. **The majority of New Horizons Bikes' customers are recreational or casual riders who primarily ride on the bike path.** The business' small fleet of rental bikes, which are almost exclusively rented for trail use, will be expanding from six bikes to about 24 to meet customer demand. About half of all rental customers are not from the area, and many are visiting friends locally and need an extra bike.

During the busy season from spring to late fall, the shop employs five people, whereas about three people work during the slower winter months. A few of these employees, including Podolski, use the path to commute to and from work.

Podolski is thrilled to have the shared use path nearby and hopes to see more marketing and promotion of the trail to boost its use and economic impacts. According to the shop owner, most customers don't realize there is a continuous path for 33 miles to the south. He also feels that better signage along the Westfield trail corridor to enhance wayfinding and promote businesses in the downtown could boost the economic impacts along the existing and future trail segments.

5.3. Congamond Coffee & Café, Southwick, MA

Congamond Coffee & Café opened in March of 2024 and is located right off the NHNCG segment in Southwick (also called the Southwick Rail Trail). The café is open every day of the week and is the only nearby food services store on the bike path open on Mondays. The décor is inspired by cozy cottage and lakeside vibes (it's located about one block from Congamond Lakes). In addition to coffee beverages, the café serves pastries, breakfast, and lunch.

Source: Congamond Coffee & Café https://congamondcoffeecafe.com/

Although the location is ideal for attracting walkers, runners, and cyclists, owner Pam Sclafani says she didn't choose it for its proximity to the rail trail and had no idea how important that would become for the business. Today, she estimates that **cyclists make up about a third of all customers (not even including walkers on the trail)!** In fact, during the roughly 20-minute conversation between Cambridge Econometrics and Sclafani, at least four cyclists stopped by the café. One day a week, a cycling group of about 10 to 15 people bike from West Hartford to Congamond to enjoy some pastries and beverages.

Because cyclists have become such a core part of business at Congamond, the café now caters to their needs. Per cyclists' request, Congamond now sells granola, trail mix, energy bites, and oatmeal cookies. The café also features a large bike rack outside, displays a bike in the shop window, and includes a community bulletin board featuring posters for local cycling events.

Sclafani believes that completing the NHNCG trail gaps, particularly the Westfield and Southampton sections to the north, would further enhance businesses at the café, encouraging longer trips and more group rides.

5.4. Bicycle Cellar, Simsbury, CT

The Bicycle Cellar in Simsbury, CT is celebrating its 60th anniversary at the same location, just off the Farmington Canal Heritage Trail (part of the NHNCG corridor). Owner Walter Rochefort bought the shop from the original owner about five years ago after working there as an employee for a number of years. Today, the shop employs about five full-time workers as well as a few part-time staff during the busy months.

Photo provided by the Bicycle Cellar

Photo provided by the Bicycle Cellar

The store sells new and used bikes for all ages as well as equipment and accessories. **Rochefort estimates that at least 70 to 80 percent of bicycle sales are primarily for use on the nearby bike trail corridor.** The bike path also offers the perfect opportunity for customers to test ride the store's vast selection of traditional and electric bikes.

In addition, the Bicycle Cellar does repairs and tune-ups and has a small rental fleet. **Rentals are almost exclusively for use on the nearby rail trail** (it is generally store policy to rent from the location rather than load the bikes on cars). While regular bikes rent for $35 and $50 for a half and full day, e-bikes rent for $35 an hour, $90 for a half day, or $150 for a full day. Rochefort estimates that 70 percent of people renting bikes are from out of town, and says that **most ask for recommendations of nearby places to eat or shop along the trail, supporting other nearby businesses.** In the coming year, Rochefort plans to contact local Bed & Breakfasts and hotels to offer packages allowing the inns to have rental bikes on premises or offer discounts for guests to rent bikes.

Many people hear about the Bicycle Cellar as a result of the shop's signage on the rail trail. In return for allowing advertising/signage along the route, Rochefort helps maintain a two-mile segment of the trail. Other businesses along the trail recognize the importance of advertising to walkers and cyclists and do the same – offering to pick up litter along a nearby corridor in exchange for signage rights.

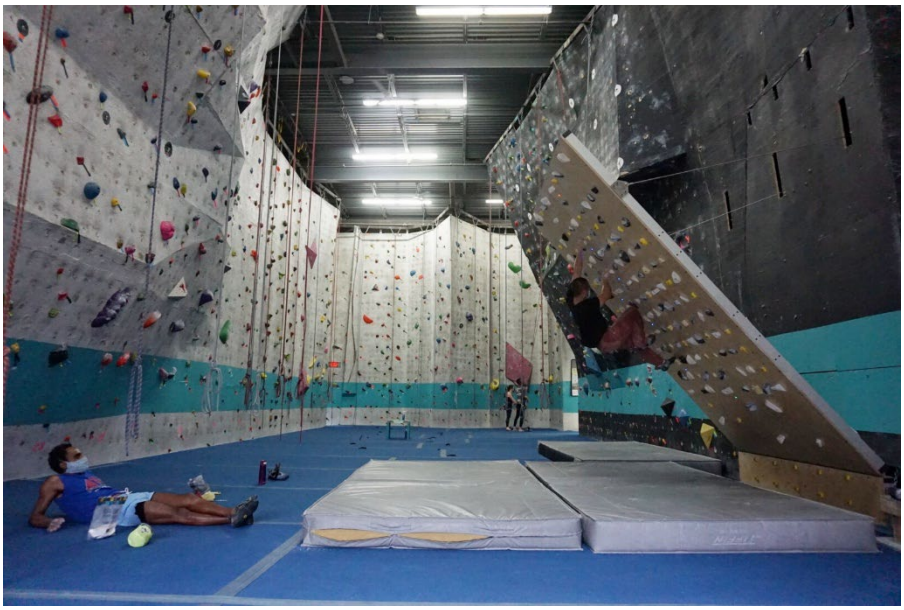
5.5. City Climb Gym, New Haven, CT

Photo provided by City Climb Gym

The City Climb Gym in New Haven, CT has been operating since 2012, offering indoor rock climbing and fitness as well as hosting birthday parties and events. The gym employs about 30 part-time staff, including many college and graduate students from nearby Yale University. Co-owner Erin Dest says that many employees bike or walk to their shifts on the nearby Farmington Canal Heritage Trail, particularly those commuting from Yale which is about a 15-minute walk or 5- to 10- minute bike ride from the gym. The gym also hosts Yale's climbing team, including practice twice a week. Dest says that few athletes drive to practice, and a group almost always walks or rides together on the rail trail. **On any given day, Dest says she will find at least five to ten bikes on the rack outside.**

The option to cycle or walk to the rock gym is important because parking at the facility is limited and the small lot often fills up. **Without the alternative transportation options, City Climb would miss out on customers due to the limited parking spaces available.**

The bike path also offers an opportunity for the gym to advertise with signage, as shown in the picture above. Many passersby on the trail see the sign and come in to check out the facility. The gym, which is located in an old factory building, would be difficult to happen upon without this advertising opportunity.



Source: City Climb Gym https://www.cityclimbgym.com/

6 Summary of Findings

The existing **NHNCG** trail serves as a major recreational and transportation asset for the region, and advocates envision a continuous corridor for active transportation with connections to urban centers, neighborhoods, and natural landscapes. Using CE's REACT input-output model, this study assesses the economic impact of the *existing NHNCG trail* as well as two scenarios assessing a future *completed/continuous trail's* impact on the Massachusetts and Connecticut economy, finding:

- **Existing:** The existing NHNCG trail segments attract an estimated 800,000 user days each year. These users spend an estimated $15.1 million annually, leading to a broader economic contribution to Massachusetts and Connecticut, including 166 jobs that pay $9.3 million in earnings and generate $16.7 million in value added and $32.1 million in total output (sales).
- **Low Scenario:** This low scenario provides a conservative, near-term (5 years after trail completion) estimate of users at a completed/continuous NHNCG. This scenario estimates the completed/continuous trail would attract 1.3 million user days each year, which would generate $32.0 million in annual spending. This direct spending would have broader economic impacts for the Massachusetts and Connecticut economy, supporting 351 jobs earning $20.0 million, and generating $35.7 million in value added and $68.4 to million in output.
- **High Scenario:** A longer-term (10 to 15 years after trail completion) high estimate captures the full potential of the completed/continuous trail to attract a range of visitors through marketing campaigns, visitor experiences, and word-of-mouth promotion. This high scenario estimates 1.6 million user days annually supporting an estimated $53.8 million in spending. This spending would lead to broader economic impacts, including 582 jobs in Massachusetts and Connecticut earning $33.5 million, and generating $60.0 million in value added and $114.4 million in output.

Stakeholder interviews with local businesses along the existing NHNCG corridors further demonstrated the tangible economic benefits of the trail. Each of these cafes, bakeries, bike shops, and fitness facilities, along with countless other businesses, benefits from the existing NHNCG corridors that pass by their respective establishments. Completing the NHNCG would attract more visitors, encourage longer distance and multi-day trips, and open new corridors for economic development opportunities.

A completed NHNCG could support

Jobs	Value added	Output
351 to 582	$36 to $60 million	$68 to $114 million

This report also considers the potential economic impacts of a shared use path following the **Merritt Parkway/Route 15** corridor from New Haven to the border of Connecticut and New York in Greenwich, CT. That corridor does not have any existing path infrastructure but was designed with space to accommodate bike and pedestrian paths. If the Merritt Parkway/Route 15 shared use path corridor were constructed, it could attract an estimated 1.4 to 1.9 million user days each year and generate $37.3 to $61.0 million in direct annual spending. This spending would ripple through the Connecticut economy, supporting 396 to 643 jobs, earning $20.9 to $34.3 million in wages and generating $40.7 to $66.6 million in value added and $75.1 to $122.7 million in output.

One additional economic impact analysis was completed as part of this study, **combining a continuous NHNCG with a completed Merritt Parkway/Route 15 trail.** This 130-mile continuous path would attract multi-day and overnight trips and provide new access to recreational and active transportation opportunities for thousands of people. Like the NHNCG and Merritt Parkway/Route 15 analysis, both low and high scenarios are provided for this assessment. In total, the combined corridor would receive an estimated 3.0 to 3.8 million user days each year and generate $77.9 to $132.2 million in direct annual spending. This spending would support 845 to 1,417 jobs in Connecticut and Massachusetts, earning $48.1 to $81.8 million in wages and generating $86.7 to $147.4 million in value added and $165.5 to $280.2 million in output.

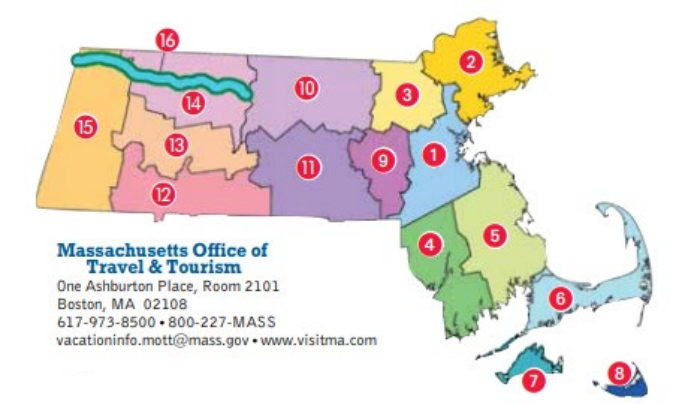
Takeaways

- **Demonstrated Economic Value:** Shared use paths support local businesses by increasing customer traffic and spending, leading to broader economic effects.
- **Regional Connectivity Matters:** Linking the path to other trail networks and population centers amplifies its impact by attracting longer-distance users and expanding market reach (while also enhancing rural or less vibrant intermediate corridors).
- **Economic Potential Yet to be Realized:** Gaps in the network or incomplete trail segments limit user numbers and spending potential. Completing and maintaining the full corridor will unlock greater returns.
- **Promotion and Marketing are Crucial:** To realize the full potential of the economic benefits, trails need to offer a full tourism package and be effectively promoted (e.g., by regional tourisms councils/districts).

Potential Next Steps

- **Complete Trail Gaps:** Continuous, off-road paths can attract a higher number of users as well as more high-spending overnight visits than fragmented trails.
- **Expand Data Collection:** Prioritize user counts and intercept surveys to monitor trends over time and evaluate the effects of improvements.
- **Improve Wayfinding to Enhance Business Impacts:** Develop marketing materials, signage, and partnership programs to help businesses attract and serve trail users.
- **Promote the Trails:** Engage regional tourism councils/districts to coordinate branding and tourism promotion across the region to position the shared use path as a destination.
- **Quantify Broader Benefits:** Explore analyses of health savings, transportation cost reductions, property value increases, and environmental benefits to complement the direct economic impact.

Rail trails in Massachusetts and Connecticut could collaborate with regional tourism councils/districts to promote the trails and leverage related economic development opportunities. These tourism entities are generally organized by county or region, but there is precedent for councils formed around transportation corridors. For example, the Mohawk Trail, a scenic byway in northwestern Massachusetts, has its own council, the Mohawk Trail Association (see number 16 on the map). Designation as a regional tourism council provides access to state tourism grants and marketing resources. Establishing a council or district centered on the region's rail trails could enhance promotion and help secure state funding for trail-related initiatives.



Source: Mohawk Trail Visitor Guide, 2025-2026. https://www.mohawktrail.com/guidebook.

For decades, these trail corridors have been envisioned, planned, and advocated for, yet they remain incomplete. Each year the trails remain unfinished represents a missed opportunity for the states of Massachusetts and Connecticut. Communities, businesses, and residents are forgoing the significant economic benefits that completed off-road trails can bring, from increased tourism and local spending to job and business growth. Beyond the economic case outlined in this report, the states also lose out on the property value benefits and health, environmental, and quality-of-life improvements that come with safe, accessible active transportation networks.

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