

CAMBRIDGE ECONOMETRICS

Economic Impact Analysis of the New Haven-Northampton Canal Greenway (NHNCG) and Connecting Trails

Dan Hodge

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NORTHEAST GREENWAY SOLUTIONS

NORWOTTUCK NETWORK

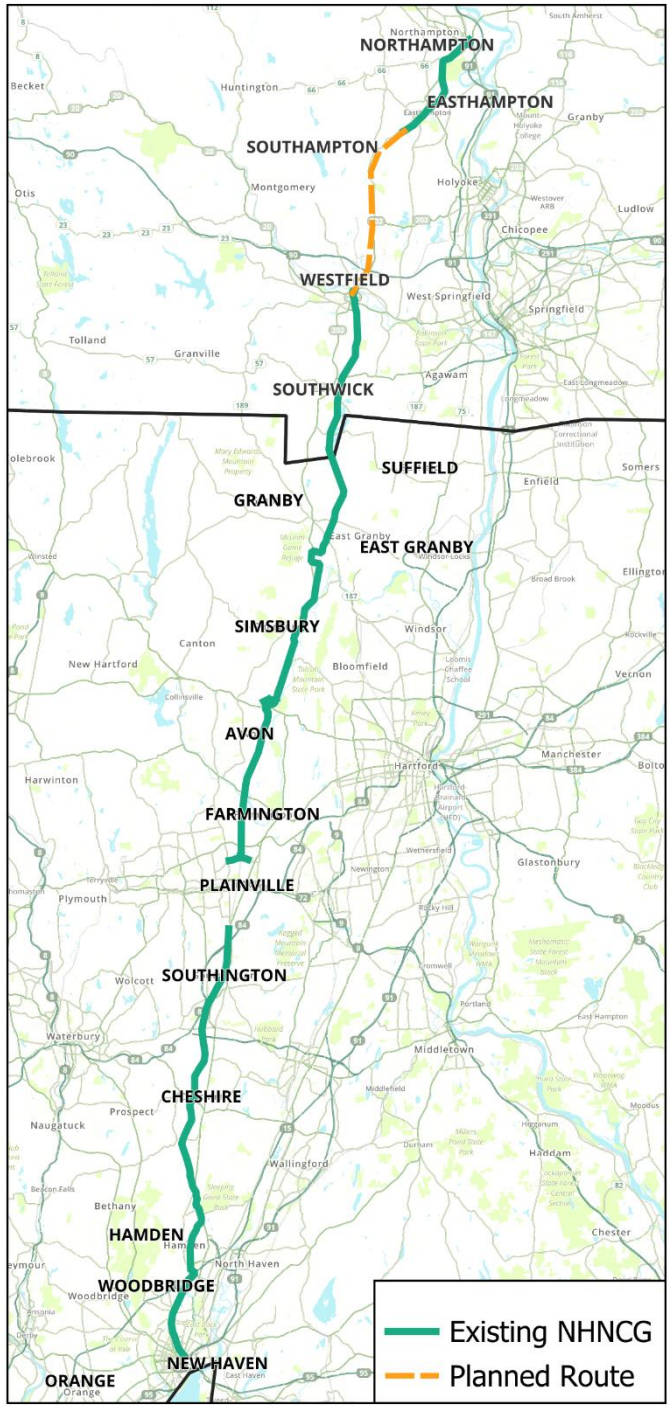
CT NHNCG MA
NEW HAVEN & NORTHAMPTON CANAL GREENWAY

Cambridge Econometrics

- Economic consulting firm first established in Cambridge (UK) over 40 years ago – just hit our five-year anniversary in the US (based in Northampton, MA)
- Specialize in **economic development and transportation** – economic impacts, benefit-cost analysis, research, strategic planning, etc.
- Lots of recent economic studies related to bike trails/shared use paths, active transportation:
    - Mass Central Rail Trail (with Kittelson & Associates) – Boston to Northampton
    - Adventure Trail – North Adams to Williamstown
    - MassDOT Complete Streets investments and economic impacts
    - Billings MT Complete Streets economic and financial analysis
    - North Carolina DOT Statewide Active Transportation Plan

Project Overview

- The 81-mile NHNCG stretching from New Haven, CT to Northampton, MA is currently 80% complete.
- The trail offers multiple linkages to connecting trails, including the Mass Central Rail Trail (MCRT), East Coast Greenway, Farmington River Trail, and more.
- Three scenarios are assessed, representing different levels of user days:
    - **Existing:** Users of the existing NHNCG 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, visitor experiences, and promotion.
- Using CE's REACT input-output model, this study assesses the estimated economic impacts of these three scenarios on the MA and CT bi-state economy.
- This presentation also assesses the economic impacts of connecting trails, including the Mass Central Rail Trail.



The NHNCG

- The NHNCG is an 81-mile shared use path that follows the historic 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 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.

Study Approach

1 **Estimate total current user days by visitor type**

User day values are based on trail counters and are estimated for local users, day visitors, and overnight visitors.

2 **Estimate user days for a fully completed NHNCG trail**

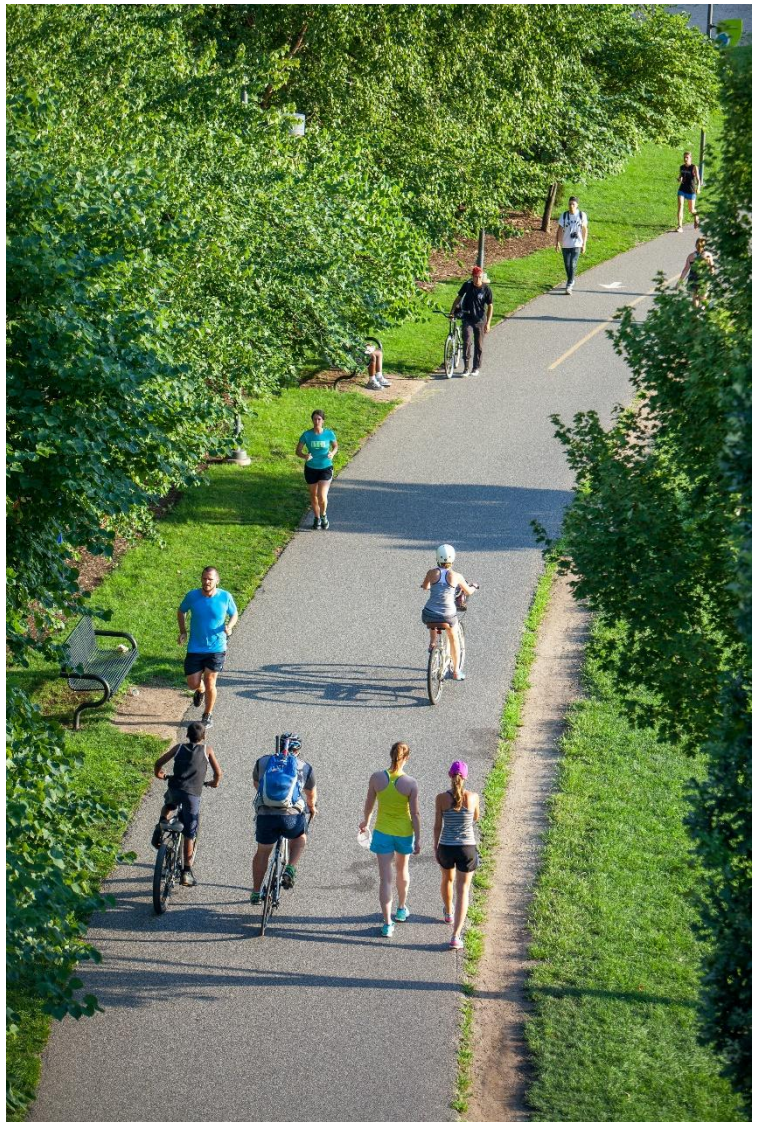
Estimate user days for a completed NHNCG (low and high scenarios) and assume a higher share of overnight users would visit a continuous trail.

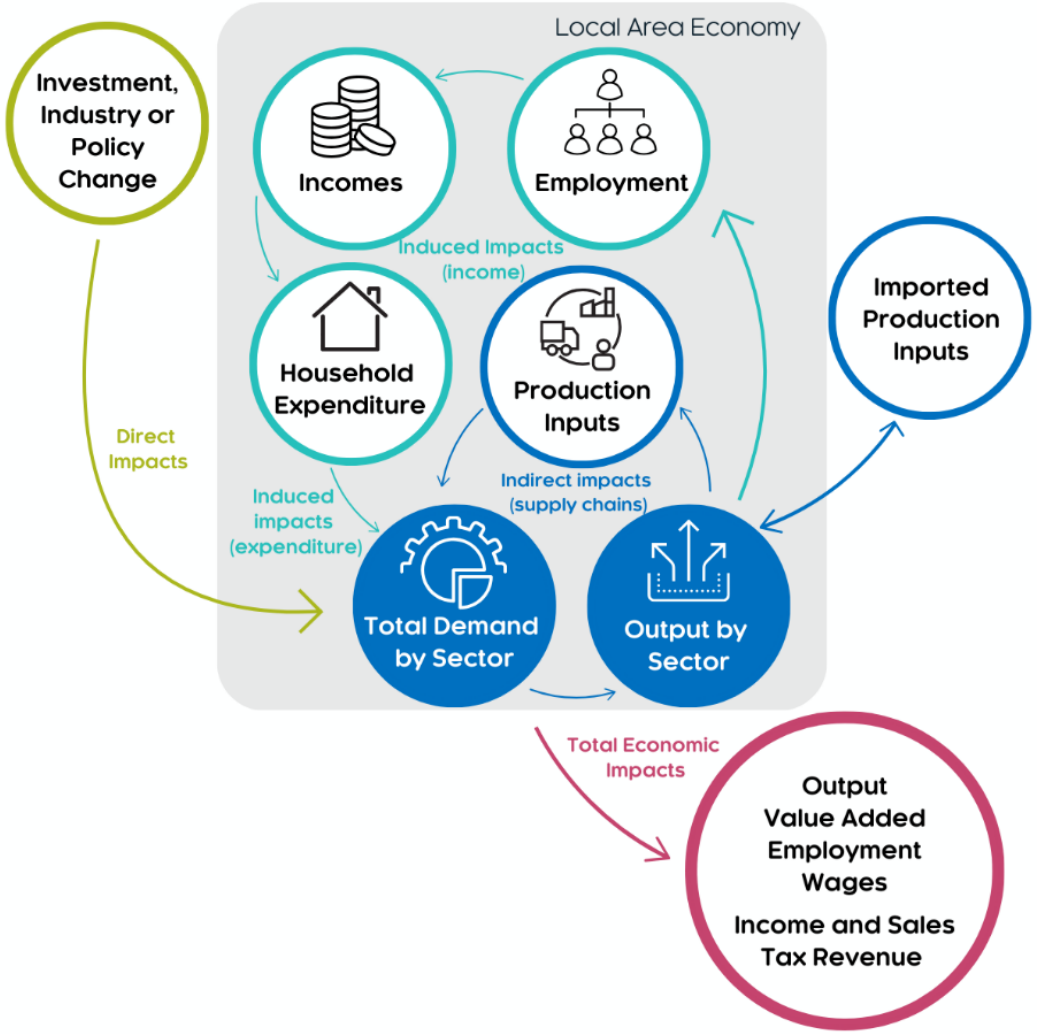
3 **Calculate visitor spending by spending category**

Visitor spending estimates are based on local tourism reports and estimated for categories such as accommodations, food, retail, and entertainment.

4 **Run the REACT model to estimate total economic impacts**

Direct spending estimates by category are entered into the REACT model to capture indirect, induced, and total impacts of the existing NHNCG and future scenarios.





The Economic Impact Study

- This study assesses the estimated economic impact of the NHNCG and connecting trails on the MA and CT economy, including direct spending impacts from trail users as well as the ripple effects of that spending throughout the states' economy.
- Two scenarios are also evaluated to understand the economic impacts of a completed/continuous NHNCG.
- This analysis uses Cambridge Econometrics' (CE) REACT input-output model to assess these broader economic impacts.



Economic Analysis of the NHNCG

User Days – Existing NHNCG

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 in a year would count as five user days.*

Total User Days

The current trail segments attract an estimated 800,000 user days each year.

User Days by State

Of the 800,000 user days, about two-thirds (525,000) occur in Connecticut.

County/Planning Region	Existing Trail Usage
Hampshire County, MA	176,700
Hampden County, MA	98,400
Capitol Region, CT	153,700
Naugatuck Valley, CT	110,600
South Central Regional, CT	260,900
TOTAL	**800,200**

Note: User days are estimated based on trail counter data when available. Raw counter data is adjusted down to account for double counting (i.e., a biker passing the same counter twice on the same ride). 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.

User Days – NHNCG Scenarios

- Next, user days are estimated for **two scenarios** of a completed, continuous NHNCG.
- These 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 results of increased connectivity.
- The scenarios also assume that the 80-mile trail would attract **more overnight visitation** than the existing segmented trail.

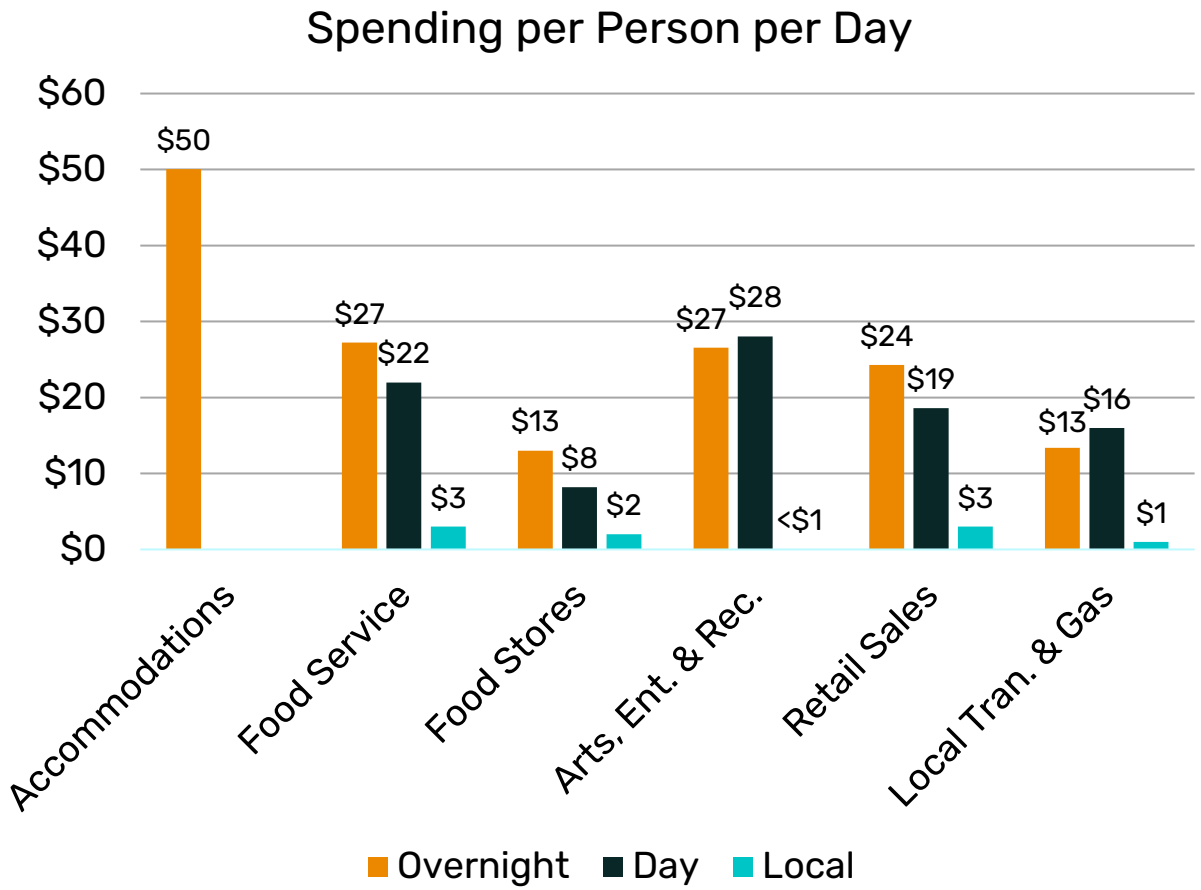
Low Scenario The low scenario estimates trail usage in the near term with limited marketing efforts.

High Scenario This more ambitious scenario considers the NHNCG's longer term potential with concerted marketing efforts and word-of-mouth recommendations.

County/Planning Region	Existing Trail Usage	Completed Trail Usage - Low	Completed Trail Usage - High
Hampshire County, MA	176,700	249,300	311,600
Hampden County, MA	98,400	254,100	317,700
Capitol Region, CT	153,700	264,900	331,100
Naugatuck Valley, CT	110,600	148,500	185,600
South Central Regional, CT	260,900	366,000	457,600
TOTAL	**800,200**	**1,282,700**	**1,603,400**

NHNCG User Spending

- Trail users impact local economies by spending money on food, entertainment, retail, etc.
- User spending estimates per person per day are derived for local users ($9), day visitors ($93), and overnight visitors ($154).
- In total, existing trail users spend $15.1 million each year while users of the completed trail are estimated to spend $32 to $54 million annually.



Note: User spending by spending category and user type (day versus overnight) are estimated using the 2023 Massachusetts Economic Impact of Visitors study and Economic Impact of Visitors in Connecticut 2023 report.

Total Economic Impacts to CT and MA

The direct spending by trail visitors would have a ripple effect through the economy deriving from supply chain activities (indirect) and increased household income spending (induced).

Existing

166
Total jobs

$17 million
In value added

$32 million
In total output (sales)

Low Scenario

351
Total jobs

$36 million
In value added

$68 million
In total output (sales)

High Scenario

582
Total jobs

$60 million
In value added

$114 million
In total output (sales)

	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**

CT Economic Impacts

User spending on the NHNCG trail segments in Connecticut leads to a total of:

Existing

102 Total jobs | **$10 million** In value added | **$19 million** In total output (sales)

Low Scenario

188 Total jobs | **$19 million** In value added | **$36 million** In total output (sales)

High Scenario

306 Total jobs | **$32 million** In value added | **$58 million** In total output (sales)

	Direct Economic Activity	Indirect Impact	Induced Impact	Total Impact
Existing				
Employment	71	12	18	**102**
Earnings (millions)	$2.85	$1.15	$1.33	**$5.32**
Value Added (millions)	$5.33	$2.44	$2.66	**$10.43**
Output (millions)	$9.57	$4.30	$5.40	**$19.27**
Low				
Employment	131	23	34	**188**
Earnings (millions)	$5.35	$2.13	$2.47	**$9.94**
Value Added (millions)	$9.90	$4.50	$4.95	**$19.35**
Output (millions)	$17.72	$7.93	$10.04	**$35.69**
High				
Employment	212	38	56	**306**
Earnings (millions)	$8.79	$3.49	$4.03	**$16.32**
Value Added (millions)	$16.28	$7.30	$8.10	**$31.68**
Output (millions)	$29.02	$12.88	$16.44	**$58.33**

Note that the combined Massachusetts-Connecticut region is greater than the sum of the individual state's 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.

Change in Economic Impacts

Completing the NHNCG would benefit Massachusetts and Connecticut with **an increase of:**

Low Scenario

185
Total jobs

$19 million
In value added

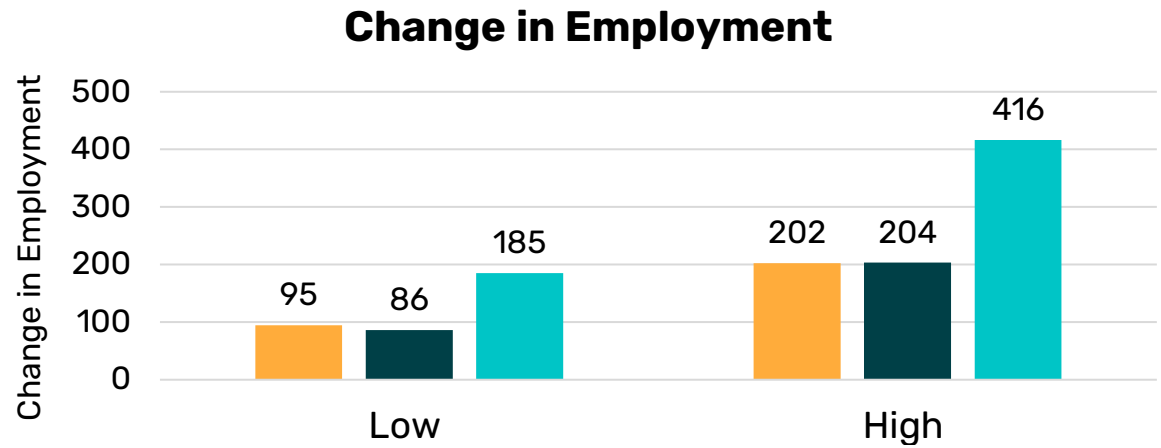
$36 million
In total output (sales)

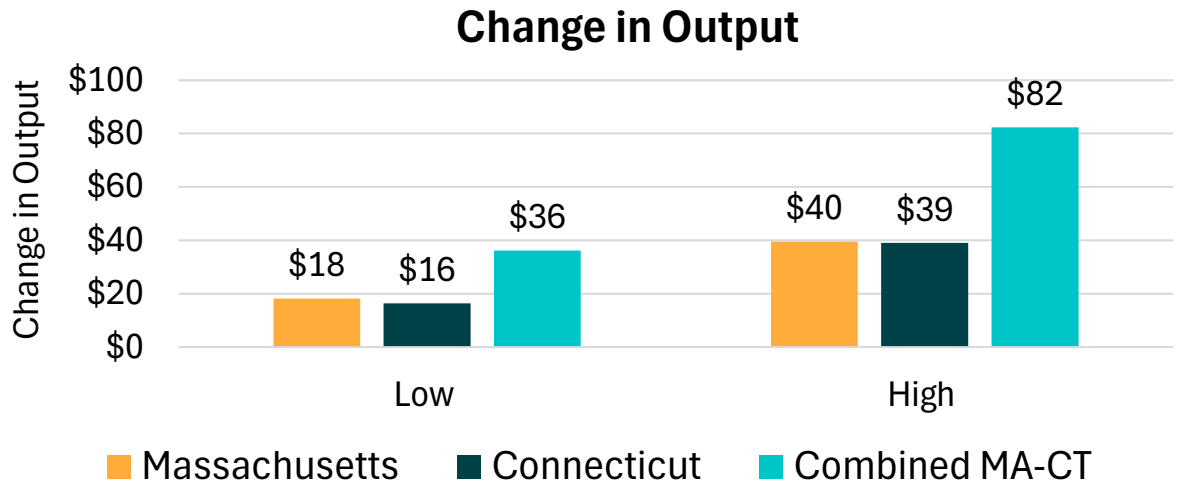
High Scenario

416
Total jobs

$43 million
In value added

$82 million
In total output (sales)





Note that the combined Massachusetts-Connecticut region is greater than the sum of the individual state's 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.

Business Impacts – Congamond Coffee & Café

- Congamond Coffee & Café is located off the NHNCG segment in Southwick, MA (also called the Southwick Rail Trail).
- Owner Pam Sclafani estimates that cyclists make up about a third of all customers (not including walkers on the trail)!
- Because cyclists are 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.



Business Impacts – The Bicycle Cellar

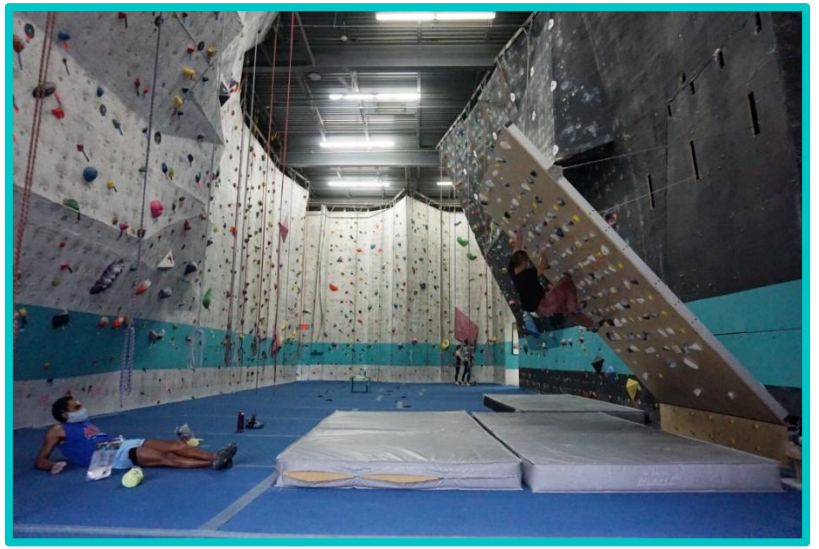
- The Bicycle Cellar in Simsbury, CT is celebrating its 60th anniversary at the same location, just off the Farmington Canal Heritage Trail segment of the NHNCG.
- Owner Walter Rochefort estimates that at least 70 to 80 percent of bicycle sales are primarily for use on the nearby bike trail corridor.
- The Bicycle Cellar also does repairs and tune-ups and has a small rental fleet that is almost exclusively for use on the nearby rail trail.
- About 70 percent of people renting bikes are from out of town, and most ask for recommendations of nearby places to eat or shop along the trail, supporting other nearby businesses.



Business Impacts – City Climb Gym

- The City Climb Gym is located on the Farmington Canal Heritage Trail in New Haven, CT and offers indoor rock climbing and fitness.
- Many employees bike or walk to their shifts, particularly those commuting from nearby Yale University.
- The gym also hosts Yale's climbing team, which practices twice per week, and most athletes travel via the trail.
- The option to cycle or walk to the gym is important because parking at the facility is limited and the small lot often fills up.
- The bike path also offers an opportunity for the gym to advertise with signage, and many passersby see the sign and come in to check out the facility.



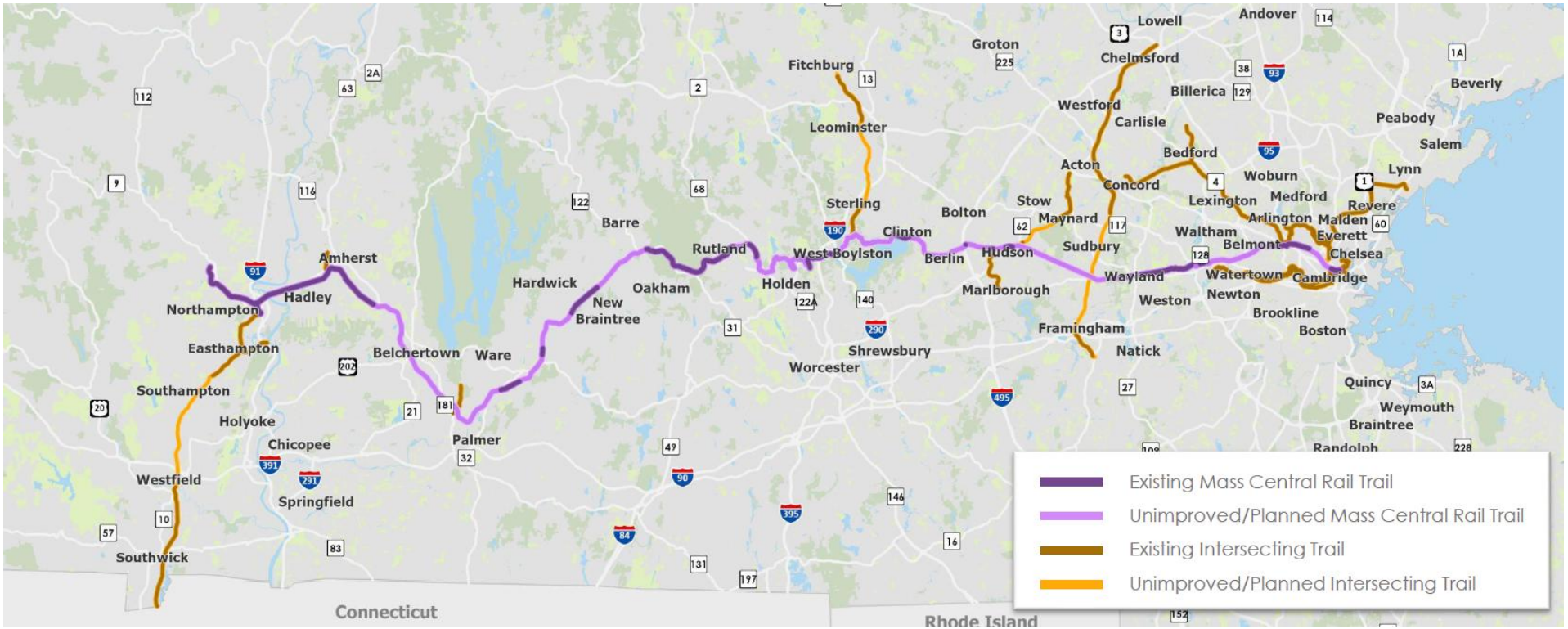




The MCRT Connection

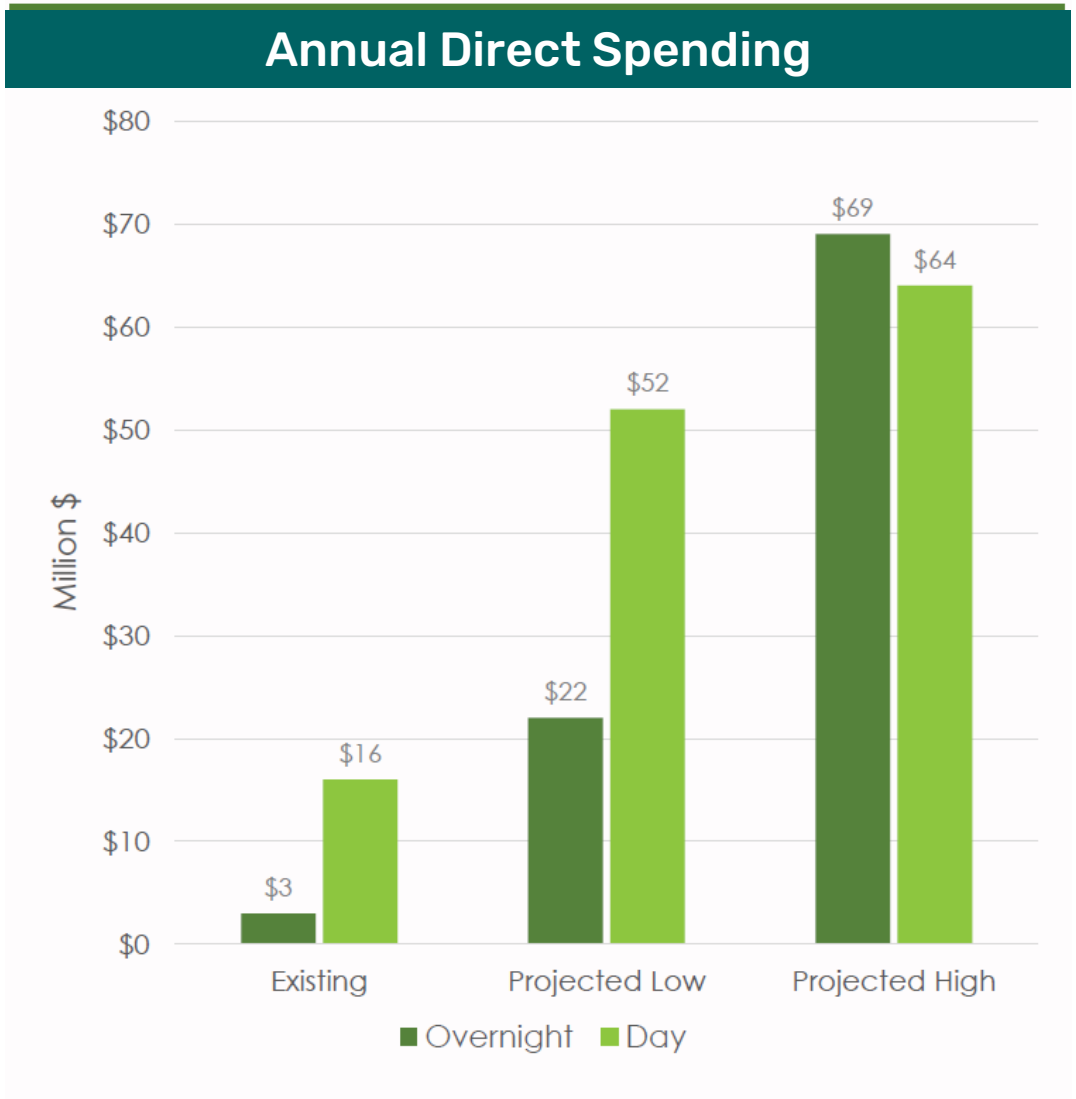
The MCRT Connection

The Mass Central Rail Trail is a 100+ mile route between Boston and Northampton, MA. 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.



MCRT Economic Impacts

- In 2023, CE partnered with Kittelson & Associates to complete an economic impact study of the east-west MCRT.
- The study estimated 1.3 million annual user days on the existing MCRT segments and 4.1 to 5.5 million user days on a completed/continuous trail.
- The existing MCRT users spend an estimated $19 million while users of a completed trail would spend between $74 and $133 million.
- This direct spending at the completed trail would support 850-1,490 jobs earning $30-$55 million in wages and generating $71-$127 million in value added, and $117-$212 million in output.



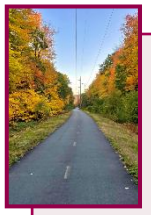
The NHNCG's Impact on the MCRT



Expanded user base



Longer stays and higher spending



Improved regional connectivity



More business development opportunities

Completing the NHNCG *and* MCRT would create a 185-mile continuous off-road corridor.

If completing the NHNCG increased MCRT use by 15 percent, the MCRT could support:

980-1,700 jobs, earning $35-$63 million in wages and generating $81-$147 million in value added, and $135-$244 million in output.

Compared to the MCRT alone, that's an increase of:

130-220 jobs, $5-$8 million in wages, $11-$19 million in value added, and $18-$32 million in output.



Conclusions and Next Steps

How to Find the Report

- https://www.camecon.com/reports/economic-impact-analysis-of-the-new-haven-northampton-canal-greenway-nhncg
- https://www.greenwaysolutions.org/n-s-report
- https://sites.google.com/view/nhncg/
- Road Less Travelled Podcast (with Craig Della Penna): https://www.youtube.com/watch?v=IWqdSOHCqIY&t=31s

Summary of Findings

- The current NHNCG trail segments attract an estimated **800,000 user days each year.** A completed trail is estimated to attract **1.3 to 1.6 million user days annually.**
- In total, existing NHNCG trail users spend an estimated **$15.1 million each year** on food, accommodation, retail, and other items, while users of a completed trail are estimated to spend **$32-$54 million annually.**
- This direct spending at the NHNCG has a ripple effects throughout the MA and CT economy, including:
    - **Existing trail**: **166 jobs and $32 million in total output** (sales)
    - **Completed trail**: **351-582 jobs and $68-$114 million in output**
- If the NHNCG increased usage at the MCRT by 15 percent, the total economic impact of the MCRT would be **980-1,700 jobs and $135-$244 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 and CT not currently an option on most bike tourism sites.

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:** 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.

CAMBRIDGE ECONOMETRICS

Dan Hodge

Cambridge Econometrics
5 Strong Avenue
Suite 207-210
Northampton, MA 01060

t: **413-588-8816**
e: **dh@camecon.com**