



Estimating the Annual Economic Impact of Mountain Biking in Vermont

Published June 19th, 2026

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Summary Paragraph/Abstract:

This report estimates the economic impact of recreational mountain biking through visitor spending to public-access trail networks across Vermont. The Vermont Mountain Bike Association (VMBA), with counsel from CRO Planning and Design, estimates that recreational mountain biking generates an annual economic impact of \$27,900,000 in direct visitor spending alone for the state. This figure underscores not only the scale of the activity but also the growing importance of mountain biking as both a recreational asset and an economic driver in Vermont. Of the total impact, approximately \$17M is attributed to non-local riders who stay overnight, based on an estimated 114,000 annual overnight visits. These visitors spend significantly more per trip than local or day riders on lodging, dining, retail, and related services. Several insights can be drawn from these results. First, mountain biking is an important source of tourism in Vermont. It can be used to leverage the popularity of Vermont winter sports and maintain tourism throughout the warmer months. These findings also show that investments in trail building and maintenance directly lead to support for local businesses, especially in more rural economies. On a similar note, none of these accomplishments is possible without a strong foundation of local riders. While they contribute less per visit, local users ensure consistent trail use, community engagement, and long-term sustainability of the network.

Introduction:

Based on results from the 2025 Vermonter Poll, conducted by the University of Vermont Center for Rural Studies, 22% of Vermonters mountain biked at least once during the 2024 riding season, with nearly 10% riding trails at least once per month. As riders seek out the vast array of mountain bike trails throughout the state, they spend money and support local economies. In the past, some information has been collected regarding rider spending to get a general understanding of how much visitors spend when they go mountain biking, though no collective approach to quantify the total impact that mountain biking has on the Vermont economy has yet been made. VMBA, with help from CRO Planning and Design, undertook the task of estimating the economic impact that mountain biking adds to the state of Vermont.

In this study, we looked specifically at the spending impact that mountain bike riders have when recreating at mountain bike trails throughout the state. We did not examine the impact of specific events, such as mountain bike festivals or races, or the employment opportunities that mountain biking generates. Additionally, this study does not attempt to value the indirect benefits



that mountain biking brings to Vermont communities, such as improving physical and mental health, enhancing property values, and attracting new residents.

Methodology:

The process to conduct this economic impact assessment began with an evaluation of the existing literature on the economic impact of mountain biking, which informed the scope and approach for developing a quantitative model and statewide economic impact estimate. Throughout the project, CRO Planning and Design, a Vermont-based firm with expertise in recreation analysis and research, played a critical role in sourcing references and relevant tools, guiding model design, and helping us build the strongest and most realistic model possible with the available information.

The first part of the process was to catalogue a comprehensive set of 102 mountain bike trail networks in Vermont and classify the networks into one of four designations, based on classifications established by the International Mountain Bike Association (IMBA). IMBA's *Guidelines for Managing the Process* handbook defines networks as Neighborhood, Community, Regional, or Destination depending on the total mileage of the network. Neighborhood networks have less than 5 miles of trail, Community 5-10 miles, Regional 10-25 miles, and Destination more than 25 miles of trails. We then evaluated the assignment of 100+ public-access Vermont mountain bike networks based on these definitions and revised designations based on additional qualitative factors, including popularity, uniqueness, proximity to population areas, and ease of access. Following this reclassification, we established a base set of 39 Neighborhood, 29 Community, 26 Regional, and 8 Destination trail systems.

Table 1: Network Classifications (Networks with *** indicate that the Network classification has been changed from original IMBA classification)

Neighborhood Classification

New Leaf Organics	Moretown Town Forest	Sunny Hollow	Twinfield Union School	Jamaica Village School	Union Village Dam
Means Woods	Chase Brook	Mobbs Farm***	Butterfield Trails	Fletcher Farms	Oak Hill
Vergennes	Wu Ledges	Mud Pond County Park	Sip of Sunshine	Irish Hill	Bellows Falls Union HS
Midland Trails	Humphrey's	Westford Bike Park	Bethel	East Montpelier Trails	Kirchner Woods
Crow Hill Trails	Dorset Hollow	Bombardier Park	Stratton Town Forest***	Mendon Rec Center	
St. Johnsbury Municipal Forest	Peru/Landgrove***	Higley Hill	Stratton Rec Area	Horace Hill	
St. Albans Town	Stranahan Town	Ball Mountain	Dumont Meadow***	Delaney Woods	



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Forest	Forest				
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Community Classification

Chipman Hill	Sterling Forest	Maple Street Bike Park***	Smugglers Notch***	Sayward Town Forest
Battel Woods	Fairgrounds***	Base Camp	Hardwick Village Forest	Rochester Valley***
Rikert Outdoor Center***	Endless Brook***	Montgomery Rec Center***	Norwich University***	Green Mountain Trails***
Cricket Hill***	Hartford Town Forest***	Back 40***	Phen Basin	Crosstown
Hard'ack Recreation Area	Trapp Family Lodge***	North Branch	Chamberlain	Adams Camp***
Carse Hills	Grafton Outdoor Center***	Blueberry Lake	Preston Legacy Forest	

Regional Classification

Moosalamoo National Recreation Area***	Catamount Outdoor Center	Sleepy Hollow***	Stratton Mountain Resort	Randolph Trails
Mount Anthony***	Craftsbury Outdoor Center	Hinesburg Town Forest	Mt. Snow	Landmark/Boston Lot***
Valley Trails***	Memphremagog Trails	Jay Rec Center	Eurich Pond	Saskadena Six***
Saxon Hill	Pine Hill Partnership	Shelburne Trails	Howe Block	Aqueduct
Millstone Trails***	Raptor Lane	The Driving Range	Cochran's	Little River

Destination Classification

Ascutney Trails	Perry Hill***	Killington Resort	Cady Hill***	Burke Mountain Resort
Bolton Valley Resort	Kingdom Trails ¹			

¹Kingdom Trails: this network is an outlier with an estimated 100,000 annual visits. It was not used to develop an average estimated visitation value for the Destination classification

From this set of trail systems, observed visitor data was collected from as many trail networks as possible, primarily based on rider counts collected using automated trail counters. Trail counters are sensors that detect when a rider passes over or by them and log data of these crossings. Trail counters are expensive pieces of technology that, as a result, have been installed on only a fraction of trail networks across the state. Data was collected from 20 networks (~20% of the total sample) in a variety of formats, which were standardized by months for the 2025 season. Several networks had only partial data for the year, in which case raw data was used to extrapolate an estimate for the typical six-month mountain bike season (May to October). With representative trail counter data in-hand, the location of each counter within each trail system and assessed the extent to which it was likely to be crossed twice within a single visit, once on the way out and once on the way back. It was determined that all of the trail counters were



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placed in locations where nearly all riders would pass through twice per visit, leading us to divide observed counts by 2 to obtain an accurate visitor number from trail counts. With these values, total annual visitation was calculated at these 20 “Observed” sites.

Table 2: Observed Network Visitation Estimates (2025)

Delaney Woods- 157	Endless Brook- 781	Sterling Forest- 2925	Saskadena Six- 3308	Pine Hill Partnership- 21600
Stratton Town Forest-648	Crosstown-1676	Chamberlain- 3071	Little River- 4966	Perry Hill- 7362
Stratton Rec Area- 703	Rochester Valley- 1697	Adams Camp- 3627	The Driving Range- 6418	Cady Hill- 15701
Oak Hill- 990	Fairgrounds- 1979	Aqueduct- 2908	Shelburne Trails- 6619	Mount Peg- 24234

With this Observed data in-hand, the next step was to estimate average annual rider volumes for each network classification. Observed data was grouped by network classification and averaged, shown in Table 3. This information was then rounded to the nearest thousand (or hundred in the case of the Neighborhood classification) to establish a Rounded Annual Visitor Volume for each classification, so as to better reflect the precision of these estimates.

Table 3: Estimated Annual Visitor Volume for Networks with an Assumed Count

	Average Annual Visitor Volume	Rounded Annual Visitor Volume
Neighborhood	625	600
Community	2251	2000
Regional	7637	8000
Destination	15766	16000

The estimated averages in Table 3, combined with the observed data in Table 2, provided visitor estimates for all 102 trail systems shown in Table 1. To translate visitor data to economic impact, Visitor Spend Profiles were created, reflective of the different types of visitors and their differing spending behaviors Data was compiled from five (5) sources: Revitalizing Waterbury: Mountain Biking’s Economic and Fiscal Impacts in Waterbury, the RecReady economic impact worksheet, VOREC’s VT Core Toolkit, a Velomont Trail economic impact study prepared by SE group, and a 2023 trailhead survey conducted by VMBA. All but the VMBA survey had spending profiles for Local riders, Non-Local riders, and Non-Local Overnight riders. The distinction between these types of riders is important because spending looks very different



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between the groups. Local riders typically spend little on gas, food, and such, whereas Non-Local Day riders drive further and often spend more in the local economy buying things like gas, food, drinks, and gear. Non-Local Overnight riders spend the most, as they incur additional lodging and meal expenses. These references are generally consistent with their spending estimates, making the selection of numbers for this estimation straightforward. Daily spend amounts of \$13 for Local riders, \$75 for Non-Local riders, and \$150 for Non-Local Overnight riders were chosen. The reference values can be found in Table 1 of the Appendix, and links to each resource mentioned are included in the References section.

Table 4: Visitor Type Daily Spend Profile Estimate

Visitor Type	Daily Spend Estimate
Local	\$13
Non-Local Day	\$75
Non-Local Overnight	\$150

Next, the composition of these visitor types for each network classification was estimated. To establish these values, a similar approach was taken to the Visitor Spending profiles (Table 4), using relevant studies and relying on expert analysis from CRO to select consensus values. The resulting values are shown in Table 5, which is split into three columns for each visitor type: Local Day, Non-Local Day, and Non-Local Overnight. The rows then correspond to the four network classifications: Neighborhood, Community, Regional, and Destination. Using many of the same resources as mentioned above: Revitalizing Waterbury, RecReady, VT Core, VMBA member survey results, and additional data that trail systems were able to provide, each classification was divided up by the percentage of Local Day, Non-Local Day, and Non-Local Overnights. While the references showed general agreement, differences in visitor classifications made selecting consensus values more complicated. Following consultation with CRO, values were selected that fell within the ranges of the reference data and reflect the general trend toward more Non-Local Day and Overnight visitors as visitation increases. Reference values can be found in Table 2 of the Appendix.

Table 5: Classification Visitor Profile Breakdown

	Local	Non-Local Day	Non-Local Overnight
Neighborhood	95%	4%	1%
Community	85%	10%	5%



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Regional	66%	11%	23%
Destination	40%	30%	30%

With the annual visitor volume for all networks, their breakdown by visitor type, and per-visit spending data for each visitor type, all the necessary information was in-hand to estimate the complete visitor spending impact for each trail network. The resulting model includes the network type, observed or estimated total visitors, annual visitor volume by visitor type, and annual spending by visitor type.

Conclusion:

Table 6: Visitation and Spend Totals by Visitor Type

	Total Visitation	Total Spend
Local	288,194	\$3,820,000
Non-Local Day	92,064	\$6,970,000
Non-Local Overnight	112,100	\$17,100,000
Total	500,369	\$27,900,000

Table 6 shows the estimated economic impact of each visitor type. With approximately 500,000 total visits to mountain bike trails across Vermont, we estimate an annual economic impact from visitor spending of \$27,900,000. While this provides a robust approximation of direct economic impact, it is important to note the limitations of our approach. About 80% of the information used to create a complete network base was projected visitor counts using averages from observed networks. In developing this model, we recognized this as the most significant driver of accuracy and devoted significant time to gathering as much observed data as possible.

While this assessment provides valuable insight into the economic value of mountain biking in Vermont, it also highlights the opportunities for further studies. Acquiring visitation data via trail counters across additional trail networks would strengthen this model and provide a more precise estimate. Additionally, this study only looks at trail network visits; a study looking into the impact that mountain bike events, such as clinics or races, would build this estimate into a more comprehensive number for mountain biking and related revenue throughout the state, as would incorporating data from all-season resorts that offer lift-access mountain biking. Lastly, our study quantified the very direct benefits of mountain biking trail visits; there are many indirect benefits that this type of cycling provides to communities. There is room for more research on the indirect benefits of mountain biking in Vermont. Our intention with this report



was to make our calculations and methodology as clear as possible and to produce a defensible approximation of the economic impact of direct spending. The Appendix contains supplemental tables and the spreadsheet-based model, which contains all tables and calculations, may be shared upon request.

References:

[Economic Benefits of Mountain Biking](#), 2025

[Mountain Biking's Economic and Fiscal Impacts in Waterbury](#)- Revitalizing Waterbury, 2025

[Rec Ready](#)- NH Department of Business and Economic Affairs, 2025

[The Mountain Bike Trail Development Guidelines](#), 2023

[VT Core](#)- Vermont Community Outdoor Recreation Economy Toolkit, 2026

[Velomont Trail](#), 2020

[2025 Vermonter Poll Results](#), 2025



Appendix

Table 1: Visitor spending profiles, including reference values.

		References:						
Visitor Type	Spend (estimate)	Revitalizing Waterbury	Rec Ready	VT Core: Low	VT Core: Middle	VT Core: High	Velomont Trail	VMBA 2023 Survey
Local	\$13	\$7.37	\$13.12	\$14.06	\$14.50	\$14.93	\$12.32	
Non-local Day	\$75	\$44.80	\$70.15	\$73.19	\$127.58	\$193.44	\$79.97	\$60.67
Non-local Overnight	\$150	\$244.60	\$154.35	\$90.90	\$132.61	\$189.52	\$89.50 (\$30 lodging)	\$126.59

Table 2: Location visitor profiles, including reference values.

				References:									
				RW	RW	Rec Ready	Rec Ready	VT Core	VMBA 2023 Survey				Pine Hill Park
Percent of Visitor Traffic (estimate)				<i>Perry Hill</i>	<i>Aggregate</i>	<i>Aggregate</i>	<i>Aggregate</i>	<i>Cady Hill</i>	Kingdom Trails	Saxon Hill	Perry Hill	<i>Pine Hill Park</i>	
	Local	Non-Local Day	Overnight	Regional (TBD)	Destination	Community	Locally Serving	Destination	Destination	Regional	Regional	Regional	
Neighborhood	95%	4%	1%	35.82%	66%	85%	50%	N/A				55%	25%
Community	85%	10%	5%	42.23%	11%	10%	12%	59%	33%	100%	90%	19%	17%
Regional	66%	11%	23%										
Destination	40%	30%	30%	21.96%	23%	5%	38%	42%	66%		10%	26%	59%