



# Preparing for growth

Readying the Elk River Trail Towns for the Future

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## EXECUTIVE SUMMARY

The outdoor recreation industry is thriving in West Virginia. Each year, tens of millions of people flock to the state to recreate in its forests, mountains, and charming communities. This activity supports 23,000 direct jobs and generates \$700 million in wages and salaries for citizens of the state each year. Recognizing the economic development power of the industry, the State has invested hundreds of millions of dollars in projects that improve recreation infrastructure and create new destinations in recent years.

Recreation and tourism investments in Central West Virginia have centered around the establishment of the Elk River Trail System, which runs through portions of Kanawha, Clay, and Braxton Counties. Paralleling the Elk River, the Elk River Trail System provides recreation opportunities for anglers, boaters, cyclists, hikers, and equestrians living in or visiting the center of the state. The Trail System is a potential game changer for the communities of Sutton, Gassaway, Clay, and Clendenin. However, to maximize the economic development power of the Trail System, communities must implement intentional strategies to accommodate an increased number of visitors from different consumer groups.

Key strategies identified in this report include:

- Development of nearly 70 new businesses over the next 10-years.
- Construction of key infrastructure to promote the flow of people between the Trail System and Trail Towns.
- Marketing of the Trail System and Trail Towns through existing and new outlets.
- Adoption of local policies designed to help with visitor attraction and small business development.

Implementation of these and other strategies included in this report is expected to cost just over \$4 million over the next 10 years. However, the economic impact associated with new tourist activity in Sutton, Gassaway, Clay, and Clendenin is much more substantial. The report finds that the Elk River Trail Towns could reasonably anticipate \$250 million in new sales activity over the next 15-years. This spending would result in nearly \$390 million in regional economic activity. This activity would support 195 full- and part-time jobs across different sectors of the economy.

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# 1. INTRODUCTION

The outdoor recreation industry boasts \$788 billion in output, supports 5.2 million jobs, and makes up 2.1% of the national GDP—more than the oil, gas, and mining industries combined (U.S. Bureau of Economic Analysis, 2021). An estimated 265 million Americans, or 80% of the population, participated in outdoor recreation during the pandemic, 87 million (33%) of whom were first timers. Forty-five million of these nascent recreationists are expected to be long-term customers (Furlong and Diamond, 2021). Overall, total outdoor participation among all groups climbed by 2.2% between 2020 and 2021 (to 52.9%), which is the largest annual increase recorded since the Outdoor Industry Association began tracking the numbers (SGB Media, 2021). As illustrated in the table below, many Americans participated in recreation opportunities that are readily available in West Virginia.

**Table 1: U.S. recreation participation July 2021-2022**

| Activity                | U.S. Participation |
|-------------------------|--------------------|
| Backpacking             | 3.6%               |
| Mountain or road biking | 15.1%              |
| Canoeing or kayaking    | 7.3%               |
| Freshwater fishing      | 10.7%              |
| Hiking                  | 16%                |
| Horseback riding        | 2.1%               |

Source: MRI-Simmons, 2022

Indeed, for a state like West Virginia, invigorated national interest in outdoor recreation presents major opportunities, but the state is no stranger to the industry. In West Virginia, the outdoor recreation economy brings in 65+ million visitors, 16.6 million overnight trips, and 49.8 million daytrips; supports 23,000 direct jobs and 45,000 supported jobs; generates \$700 million in wages and salaries; contributes \$1.5 billion in value added; yields \$534.5 million in tax revenue; and comprises 1.9% of the state GDP, making it one of the top thriving industries in the state (Outdoor Industry Association, 2021).

However, there is still opportunity to grow the industry in West Virginia to facilitate more visitors, create jobs, and support local communities. To do this the State has invested hundreds of millions of dollars in projects that improve existing recreation infrastructure or create new infrastructure that facilitates the establishment of brand-new destinations throughout the state. Central West Virginia, home to many scenic rivers, forests, mountains, and charming communities steeped in rich history has received a portion of this investment for a couple of hallmark projects centering around the establishment of the Elk River Trail System, which runs through portions of Kanawha, Clay, and Braxton Counties. Paralleling the Elk River, the Elk River Trail System provides recreation opportunities for anglers, boaters, cyclists, hikers, and equestrians living in or visiting the center of

the state. The Elk River Trail Foundation is a group of citizens and businesspeople dedicated to enhancing the Elk River Trail System and maximizing its benefits.

### THREE TRAILS, ONE MISSION

The Elk River Trail System is comprised of three non-motorized trails in central West Virginia: 1) The Elk River Water Trail, 2) Elk River Rail Trail, and 3) The BC&G Rails-with-Trail. Together, these trails offer visitors a unique experience to explore one of West Virginia's most scenic watersheds.

The trails are supported by the Elk River Trail Foundation, which upholds the mission to preserve, protect, and enhance the Elk River Trails for public recreation, community health and well-being, conservation, ecology, education, economic development, and cultural enrichment.



The Elk River Trail Foundation recognizes that a trail alone will not spur economic development in Central West Virginia. The vision of the Foundation is to work in collaboration with communities along the trail system to deploy strategies that effectively attract trail system users, capture their tourism expenditures, and do so in a manner that does not compromise each community's unique characteristics.

To assist with achieving this vision, The Elk River Trail Foundation, in partnership with the Braxton County Development Authority and several other stakeholders, enlisted Downstream Strategies to develop a plan for communities along the trail system to maximize the social and economic opportunities presented by the trails. This document presents Downstream Strategies' findings and recommendations in four sections:

- 1) Existing Conditions and Assets
- 2) Market Analysis
- 3) Recommendations
- 4) Implementation Plan

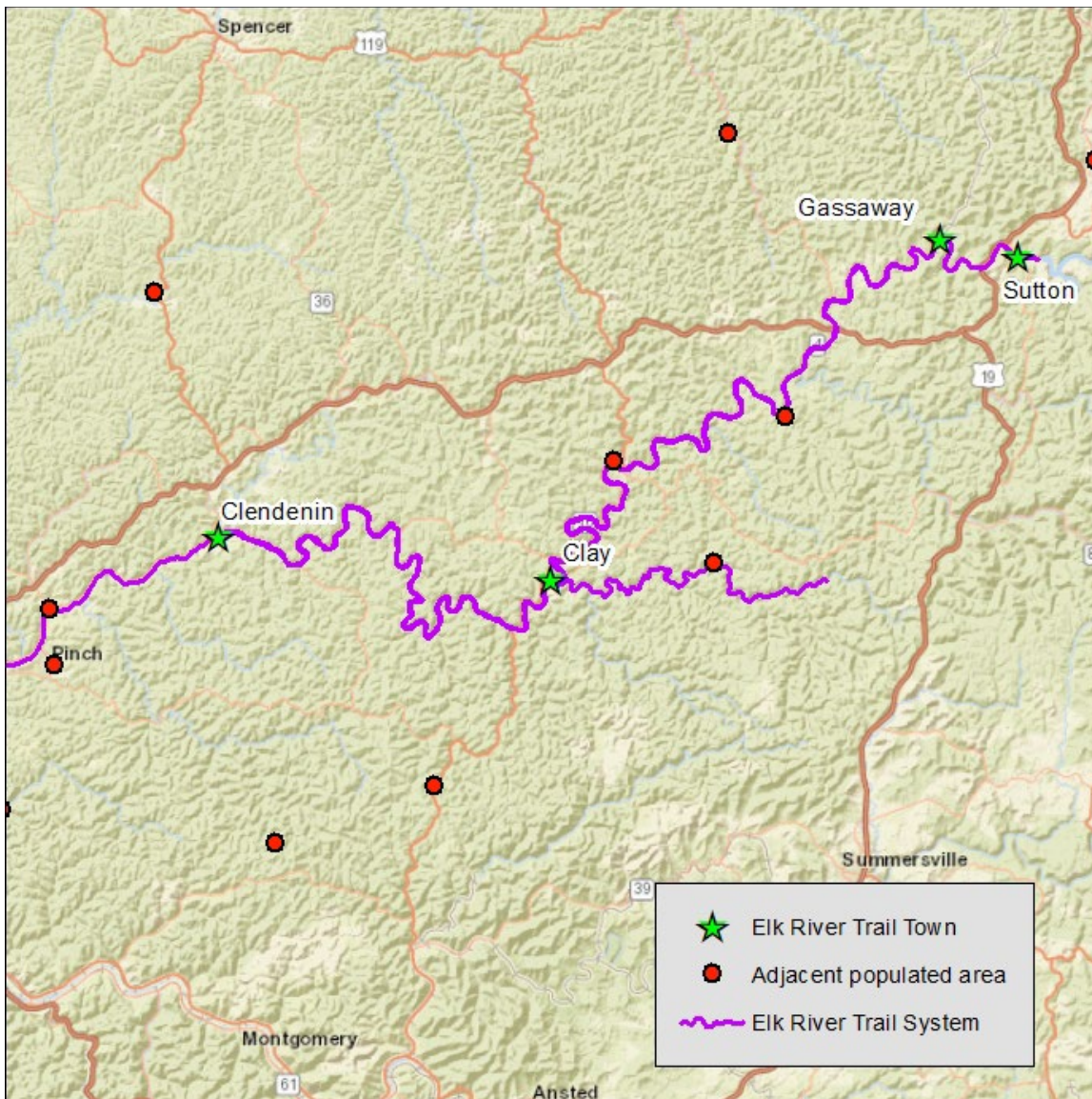
The goal of this plan is to better prepare communities along the Elk River Trail System for significant increases in tourism. In doing so, this report will help stakeholders contribute to the greater statewide effort.

*There is still opportunity to grow the industry in West Virginia to facilitate more visitors, create jobs, and support local communities.*

### 1.1 Elk River Trail Towns

There are 33 distinct populated areas along the Elk River Trail System. Individuals and businesses within each of these 33 communities will undoubtedly all benefit from the Trail System; however, for the purposes of this plan, Downstream’s research efforts are focused on opportunities in four of the largest communities—Sutton, Gassaway, Clay, and Clendenin. Each of these communities are within a short distance of Interstate 79 and have established built environments that could—with some improvement—accommodate a significant number of tourists.

**Figure 1: Elk River Trail Towns and adjacent populated areas**



### 1.1.1 Sutton

Sutton is the county seat of Braxton County with 863 people (2020, U.S. Census). Downtown Sutton is listed in the National Register of Historic Places. Situated 3.5 miles from the geographical center of West Virginia, Sutton was settled in 1792 by Adam O'Brien of Bath County, Virginia. In 1810, John D. Sutton settled at the confluence of the Elk River and Granny's Creek just beyond Historic Downtown Sutton. Then, in 1826, the village of Suttonville, formerly Newville, was chartered and named after John D. Sutton (Gioulis, Michael)

Because of Sutton's central location in West Virginia, it was positioned at the juncture of major transportation routes. The Elk River was navigable all the way to Charleston. The Weston & Gauley Bridge Turnpike connected the Staunton & Parkersburg Turnpike to the James River & Kanawha Turnpike through Sutton (Gioulis, Michael).

Today, Sutton is still situated at the center of transportation in West Virginia. Interstate 79, a major north-south route, runs along the western border of the town limits. I-79 also connects with Appalachian Corridor L (U.S. 19), another significant north-south route, just south of town.

During the Civil War, Confederate soldiers burned most of downtown Sutton. The town slowly rebuilt until the local timber industry heightened, transforming Sutton into a commercial center. Many of the banks, hotels, stores, and other historic buildings in the Sutton Downtown Historic District date from this time (U.S. Department of the Interior, 1987).



(Above) The Elk River flows out of Sutton Dam immediately upstream of the Town of Sutton's historic downtown.



### 1.1.2 Gassaway

Gassaway is a town in Braxton County of about 750 people (2020, U.S. Census). The town is named after U.S. Senator and industrialist Henry Gassaway Davis. Gassaway was incorporated in 1905 at the time of the construction of Davis' Coal and Coke Railroad. The railroad ran from Charleston to Elkins and was divided into two sections. The section running towards Elkins required much heavier engines to haul the trains through the tunnels and over the hills. Because of the transition, many shops and businesses developed in Gassaway between 1900 and the 1950s (O.O. Sutton, 1942).

Gassaway thrived through the Coal and Coke Railroad days and peaked during the steam engine era. Steam engines required more operations which created more jobs. Once operations transitioned to diesel, supporting facilities shuttered and operations declined. By the 1990s, the Gassaway Depot ceased operations with the railway mainly serving as storage (WVNC Rails, 2010).



Located at the confluence of Little Otter Creek and the Elk River, Gassaway has multiple river access points to the Elk River Water Trail. Other outdoor recreation spots nearby include Sutton Lake, Holly-Gray Park, and Cedar Creek State Park. Many visitors enjoy camping, fishing, boating, and wildlife viewing nearby.

With the development of Gassaway steeped in railways, the Gassaway Depot was listed on the National Register of Historic Places in 1994. Many of the buildings erected at the time of Gassaway's incorporation remain today.

### 1.1.3 Clay

The town of Clay is the county seat of Clay County with 396 people (2020, U.S. Census). The town sits on the banks of the Elk River about 41 miles north of Charleston. The Elk River has shaped Clay as it cuts a deep gorge around the town making flat bottom land scarce. The soil is rich in the area and was very attractive to early settlers. In 1858, the first Clay County court met at David McOlgin's farm which would later become the present-day town of Clay (Samples, 2012).

Clay was incorporated in 1895. Like many communities in West Virginia, Clay's industry centered around coal and timber. Then, in 1905, with the arrival of the Coal and Coke Railway, Clay was able to provide coal to the national market. The coal industry peaked in Clay during the mid-20th century with many operations closing by the 1970s (Samples, 2013).



(Above) A banner advertising a summer event hangs above Main Street in downtown Clay.

### 1.1.4 Clendenin

Clendenin is a town in Kanawha County of about 854 people (2020, U.S. Census). Incorporated in 1904, the town was named after the Clendenin family who were among the founders of Kanawha and Mason counties. During the early 20th century, Clendenin boomed with the discovery of the Blue Creek oil field. Timber, coal, and oil and gas were the main economic drivers of the day. In 1920, Clendenin was the birthplace of Union Carbide Corporation, the first petrochemical plant in the world (Hieronymus, 2019).

However, five years later, Union Carbide quickly outgrew the Clendenin site and relocated to South Charleston. With the decline of the oil and gas industry, the relocation of Union Carbide, and termination of rail services to the area, Clendenin lost its major industries. Today, like the other Elk River Trail Towns, it is rebuilding itself as a destination.



(Above) As if to state the trail’s prominence in town, a wayfinding sign for the Elk River Trail greets all that enter Clendenin to the left of the town welcome sign.

### SETTING THE STAGE IN CLENDENIN

In 2020 E.L. Robinson Engineering and M. Miller Development Services completed a Trail Town Planning Feasibility Study for the Town of Clendenin. Since its release, town officials and their partners have worked diligently on implementing the set of recommendations established by the consulting team. This initial assessment and recommendations serve as a critical foundation to the analysis completed by Downstream Strategies in Clendenin.

## 2. EXISTING CONDITIONS AND ASSETS



The recipe for a **tourism economy** is built on **tourism attractions plus tourism infrastructure**. Together, tourism products and tourism infrastructure represent what is sometimes referred to as the **tourism value chain**—the composite of all tourism-related products and services in a specific region, particularly as they contribute to the economy.

The term value chain is rooted in business management circles since 1985. The value chain is a tool or model used to enhance or assess a competitive advantage of a business by dividing a business into “discrete activities it performs in designing, producing, marketing and distributing its product” (Porter, 1985). Consequently, value is added to the product at each separate business activity.

The tourism industry is unlike other businesses that produce real goods or widgets like lumber, clothes, or cars. Rather, tourism is a service industry that produces an experience. That experience generally revolves around a destination, attraction, and/or activity. For example, trail systems, scenic rivers, ski resorts, historic parks, and cultural festivals.

In the value chain, tourism attractions are supported by several primary business activities. These primary activities are essential for adding value and creating competitive advantage for a town to capture tourism expenditures (Miličević, 2021). Primary activities include:

1. Lodging – hotels, motels, bed and breakfast, cabins, campgrounds
2. Food and beverage – restaurants, grocery stores, food providers
3. Outfitters and tour and guide services – gear shops, rentals, shuttle services
4. Shopping and entertainment – retail shopping and other activities.

These primary activities add value to the destination by attracting visitors and keep them exploring and spending money in the community. Consequently, the additional spending stimulates the local economy by supporting jobs and provides revenue for the tax base. Infrastructure, including buildings; water systems; roads and sidewalks; and wayfinding should be organized in a way to make the primary activities more efficient.

Infrastructure is rarely the attraction for tourism. However, appropriate infrastructure complements and improves the tourism experience. As an example, a resort destination planning to attract large numbers of visitors each year requires an adequately sized water and sewage treatment plant, waste management, and good roads to operate.

Downstream Strategies conducted extensive mapping and field reconnaissance in each of the Trail Towns, focusing on the parts of the tourism value chain described above. Additionally, a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis was conducted at a public meeting in each

of the towns. Town-specific observations related to primary business activities are presented in Sections 2.1 through 2.4. Observations related to infrastructure are discussed in Section 2.5. Recommendations based on this initial assessment are presented in Section 4. The economic impact of implementing these initial recommendations is calculated in Appendix B.

## 2.1 Sutton

Sutton is the only Elk River Trail Town without current access to the rail-trail. However, the community has worked hard in recent years to establish and promote a unique set of attractions within and surrounding the town. Defining themes among the attractions in Sutton include history, flat water recreation, hiking and biking trails, and arts and cultural destination and events. Appendix A provides a detailed summary of these attractions.

### 2.1.1 Primary activities

As summarized in Table 2, Sutton has well established primary activities that support its diverse set of destinations; however, there remains opportunity for improvement.

**Table 2: Primary activities in Sutton**

| Primary activity                           | What visitors want  | What Sutton currently has   | Opportunities   |
|--|---|---|---|
| Lodging                                    | High-end campgrounds (electric, water/sewer hookups for RVs, Wi-Fi) Short-term rentals (cabins, houses, etc.) | Sutton offers new services like the Elk River Hotel & Café with traditional comfortable rooms and glamping domes, bed and breakfast options at Mountain Laurel Country Store, the Elk Motor Court, and the Elk Hostel. Campgrounds and RV parks are also located outside downtown at Sutton Lake. | Additional short-term rentals near downtown   |
| Food & dining                              | Local non-chain coffee shops, cafés, food trucks, micro-breweries   | Downtown offers local dining options like the Elk River Hotel & Café, Main Street Coffee, the Bad Axe Bistro, and Maria’s Mexican Grill and Cantina. Right outside of town is Stancati’s Family Restaurant.   | Local, non-chain establishment of any kind  |
| Recreation-focused businesses and services | Outdoor gear shops, rental/guide/shuttle/repair services  | None  | Small, multi-sport outdoor shop with rental service focusing on river-based opportunities |
| Other aspects                              | Other shops, arts and cultural activities   | <ul style="list-style-type: none"> <li>· Mountain Laurel Country Store</li> <li>· Country Charm Floral</li> <li>· The Elk Theater</li> <li>· Landmark Studio for the Arts</li> <li>· Garnet Moon Boutique</li> </ul>  | Grow visitation at existing arts and cultural opportunities                               |

## 2.2 Gassaway

Located only four miles away from downtown Sutton, Gassaway has access to both the Elk River water trail and the rail trail. From the historic Gassaway Depot --- located one block from Gassaway’s main street, Elk Street --- visitors have access to scenic views of the Elk River and can hop onto the rail-trail. The primary attractions in Gassaway are the Elk River Water and Rail Trail. However, Gassaway also serves as a jumping off point on the Elk River Scenic Byway, which is celebrated for its scenic, cultural, natural, and recreational landmarks. Appendix A provides a detailed map of the attractions found in Gassaway.

### 2.2.1 Primary Activities

As summarized in Table 3, Gassaway has established primary activities to support its destinations; however, there is opportunities for immediate improvement.

**Table 3:Primary activities in Gassaway**

| Primary activity                           | What visitors want   | What Gassaway currently has   | Opportunities  |
|--|--|---|--|
| Lodging                                    | High-end campgrounds (electric, water/sewer hookups for RVs, Wi-Fi)<br>Short-term rentals (cabins, houses, etc.) | Currently, only short-term rental accommodations like the River House are offered in Gassaway. Outside of town, camping is available at Elk River Camp and RV and Elk River Campground in Frametown.  | Additional short-term rentals in downtown Gassaway.  |
| Food & dining                              | Local non-chain coffee shops, cafés, food trucks, micro-breweries  | Gassaway has two locally owned restaurants located two blocks from the rail trail, Annabelle’s Bohemian Bistro and Davis’s Gourmet Pick Ups. The Dairy Queen on Elk Street is also a popular spot eating and rest stop for locals and non-locals. | Local, non-chain establishment of any kind   |
| Recreation-focused businesses and services | Outdoor gear shops, rental/guide/shuttle/repair services   | Elk River Paddle and Yak doesn’t have a brick and mortar location, but provides kayak rentals and shuttle services out of Gassaway.   | Small, multi-sport outdoor shop with rental service focusing on river and rail-trail opportunities |
| Other aspects                              | Other shops, arts and cultural activities  | <ul style="list-style-type: none"> <li>· Picaddily’s Flower Shoppe</li> <li>· Mimi’s Timeless Creations</li> </ul>  | Grow existing arts and cultural opportunities  |

## 2.3 Clay

Situated at the confluence of the Elk River and Buffalo Creek, approximately 57 miles downstream of Gassaway, the Town of Clay offers multiple water and rail trail-based attractions. Notably, the Town is among only a handful of communities around the country to play host to a rail biking attraction. The Buffalo Creek Rail Rides allows visitors to pedal a cart directly on the railway itself. Providing a glimpse into West Virginia’s mining history, the rail bike provides an exceptional view into the past unlike any other. Appendix A provides a detailed map of the attractions found in Clay.

### 2.3.1 Primary Activities

Primary activities that support Clay’s destinations are summarized in Table 4.

**Table 4: Primary activities in Clay**

| Primary activity                           | What visitors want   | What Clay currently has  | Opportunities  |
|--|--|--|--|
| Lodging                                    | High-end campgrounds (electric, water/sewer hookups for RVs, Wi-Fi)<br>Short-term rentals (cabins, houses, etc.) | Clay offers a variety of lodging experiences with a traditional hotel stay at the Elk River Inn and camping experiences across the river at JG Bradley Lodge and Campground. | There are currently no short-term rental options in or near downtown Clay. At least 5 short-term rentals should be established immediately |
| Food & dining                              | Local non-chain coffee shops, cafés, food trucks, micro-breweries  | There are only three dining options in Clay: Tudor’s Biscuit World, Ginos Pizza, and Subway—all located in the Upper 2 section of town.                                      | Local, non-chain establishment of any kind in the heart of downtown  |
| Recreation-focused businesses and services | Outdoor gear shops, rental/guide/shuttle/repair services   | Clay Yak Rentals offers kayak rentals and shuttle service.   | Small, multi-sport outdoor shop with rental service focusing on river and rail-trail opportunities   |
| Other aspects                              | Other shops, arts and cultural activities  | <ul style="list-style-type: none"> <li>· Altar’d Wood &amp; Sassy Hattie</li> <li>· Fabric and Gift Shop</li> </ul>  | Grow existing and new shopping, arts, and cultural opportunities   |

## 2.4 Clendenin

Located 30 minutes north of Charleston and 10-miles downstream of the Town of Clay, Clendenin is the southernmost trail town on the Elk River Rail Trail. Steeped in history, Clendenin is a popular destination amongst historic preservationists interested in early 20th century architecture. The town is also a favorite spot for many to cast their rods for the chance to catch the next record breaking muskie. Appendix A provides a detailed map of the attractions found in Clendenin.

### 2.4.1 Primary Activities

Clendenin offers primary activities that position it well to serve visitors. Primary activities that support tourism in Clendenin are summarized in Table 5.

**Table 5: Primary activities in Clendenin**

| Primary activity                           | What visitors want   | What Clendenin currently has   | Opportunities   |
|--|--|--|---|
| Lodging                                    | High-end campgrounds (electric, water/sewer hookups for RVs, Wi-Fi)<br>Short-term rentals (cabins, houses, etc.) | Accommodations are mainly short-term rentals with unique stays downtown above retail shop fronts. Take Me Home Bed and Brewery offers a unique lodging experience.   | A boutique hotel or additional short-term rentals are needed to support a growing number of visitors.   |
| Food & dining                              | Local non-chain coffee shops, cafés, food trucks, micro-breweries  | Clendenin provides many locally owned food and beverage options with establishments like Elk River Baking Company, Clendenin Brewing Company, Paddler’s Bar and Grill, Momma Payne’s Diner, and Frostbite Dairy Bar. | Local, non-chain establishment of any kind  |
| Recreation-focused businesses and services | Outdoor gear shops, rental/guide/shuttle/repair services   | Yak House Rentals offers both kayak and shuttle service for trips on the river.  | Small, multi-sport outdoor shop with rental service focusing on river and rail-trail opportunities  |
| Other aspects                              | Other shops, arts and cultural activities  | <ul style="list-style-type: none"> <li>· Elk River Boutique</li> <li>· Pamala’s Gifts and Treasures</li> </ul>   | Grow existing and new shopping, arts, and cultural opportunities. A smaller grocery store could also work in Clendenin. A reopening of the Roxy Theater could provide a unique space for public and private events. |



## 2.5 System-wide infrastructure

The project team’s evaluation of support activities focused on two areas seen as particularly critical for advancing tourism-related initiatives in the Elk River Trail Towns: infrastructure and wayfinding.

Six key observations were made related to infrastructure in the Trail Towns.

### 2.5.1 Condition of downtown buildings

There are several older buildings within the Elk River Trail Towns that are at critical stages of deterioration and require immediate intervention to be saved. These buildings are central to the character of each town and consequently important to the success of tourism along the Elk River. Some of these buildings are occupied by businesses or government entities, but many are vacant and could be repurposed to complement the growing recreation and tourism industry. It is worth noting that several business owners acknowledged problems with the appearance of the buildings they occupy but cited a lack of funding to address the issues.

### 2.5.2 Trail-side blight

Sutton, Gassaway, and Clay were laid out with the rear of most buildings facing the river and/or railway. While the front sides of most buildings are well-maintained, the rear sides have in some cases been ignored. Trail-facing sides of buildings will provide a first impression to visitors of each trail town and may influence whether a visitor decides to venture into the downtown area.

(Right) The rear of some buildings along the trail in Gassaway have been neglected.

### NELSONVILLE, OHIO: A CASE STUDY IN BLIGHT MITIGATION

Nelsonville is a small town situated in the foothills of southeastern Ohio, about 15 miles outside Athens. In the early 2000s, Nelsonville had challenges downtown with empty storefronts with an occupancy rate of 25 percent, dilapidated buildings, and crumbling sidewalks. About this same time, the Foothills School of American Crafts moved downtown. Understanding that activity was the lifeblood of downtown economic success, Hocking College, private donations, and a grant from the Ohio Arts Council subsidized the rent of artists. In exchange, artists would fix up the buildings and breathe fresh life into downtown. As the art community created a bustle downtown, other retailers like coffee shops and restaurants and individuals were eager to open in remaining empty spaces. (University of North Carolina, 2022)



### 2.5.3 Sidewalks and accessibility along trail connections

Most sidewalks within each of the towns are in decent condition. However, connections between the central business districts and the Elk River Rail and Water Trails could be greatly improved. These connections will serve as entryways for visitors exiting the Elk River Trail System.



(Above) 5<sup>th</sup> Street in Gassaway is likely to serve as the trail connection between downtown Gassaway and the Elk River Rail Trail. As shown above, sidewalks on the left side of the road are overgrown with grass and there are obstacles blocking direct access to the downtown area.

#### 2.5.4 Water and sewer

Sutton, Gassaway, Clay, and Clendenin all have issues with existing water and sewer infrastructure, and this was a major threat to tourism identified by people attending public meetings in each of the towns. Sutton and Gassaway, for example, experience regular flooding of their main streets due to inadequate or aging storm sewer infrastructure.



(Above) Water and debris accumulate at the corner of Elk and 3<sup>rd</sup> Street in Gassaway after an early summer rainstorm. Photo provided by Lois Cole.

### 2.5.5 Access to the water

The Elk River is a prominent feature in each of the trail towns; however, access to the river for recreation opportunities requires significant improvement. Indeed, most of the prime access areas are privately owned; however, the project team was able to identify more than 30 existing access points that are being utilized by boaters to access the Elk River Water Trail. While this number may seem appropriate, with most sources recommending public access points every ~5 miles, the average condition of these water access areas is less than adequate. Most water access points have no signed parking and require the boater to scramble down a muddy riverbank to access the water. This greatly limits the type of visitor that can come to the Elk River Trail.



(Above) The Upper Mon River Association, the Morgantown Area Paddlers, and several municipalities have worked together to establish handicap accessible kayak launches every few miles along the Monongahela River Trail in Monongalia County. The launch above was designed by EZ Dock, installed by a local contractor, and is maintained by local volunteers.

### 2.5.6 Wayfinding

Wayfinding refers to the information systems that guide people through a physical environment and enhance their understanding and experience of the space. Along trail systems, this is done primarily through signage, but can also be accomplished via web applications and other tools. Place-appropriate wayfinding is critical to move people from the Elk River Trail System and other recreation destinations to the Trail Towns and businesses therein.

Some wayfinding signs exist in each of the Trail Towns; however, most existing signs are outdated and very few direct people between destinations and businesses. Further, there's currently no standard design for wayfinding signs in the Elk River Trail Towns.

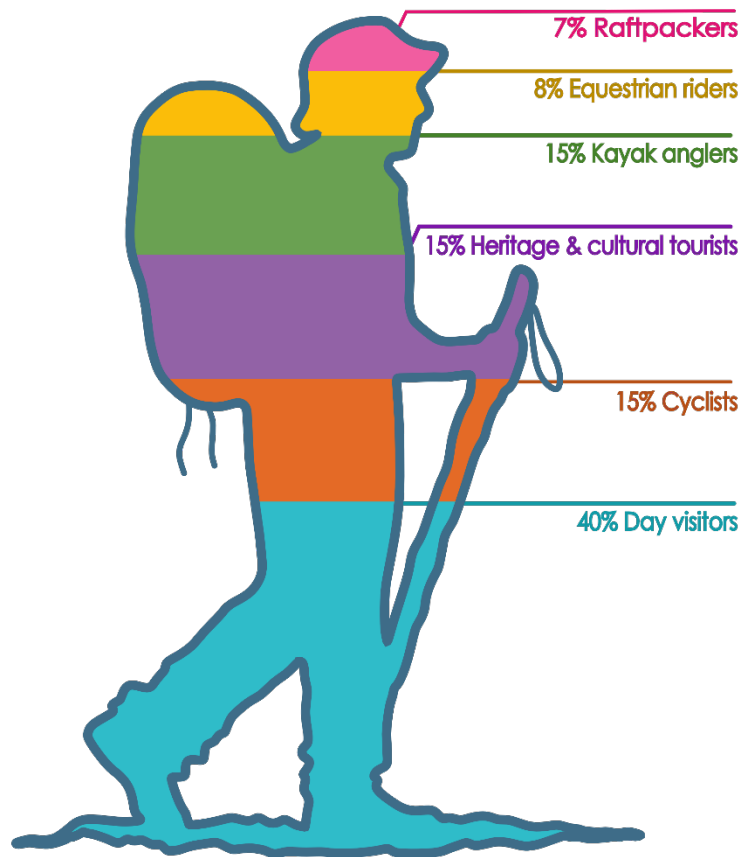
### 3. MARKET ANALYSIS

The Elk River Trail System and the surrounding area is on the precipice of an exponential increase in visitors. The spending resulting from visitors to the area will no doubt impact the number and types of businesses needed to serve tourists. This chapter examines the consumer preferences of key user groups expected to visit, estimates total spending of visitors in the Trail Towns, identifies businesses needed to support growth, and quantifies the total economic impact of new visitors and businesses over the next ten years.

#### 3.1 Consumer preferences of key user groups

The Elk River Trail System and Trail Towns are within 250 miles or roughly a four-hour drive of over 27 million people (US Census Bureau). This population of Americans spends approximately \$6,200 per year on travel, entertainment, and recreation each year (ESRI, 2022).

Market demographics within this 250-mile radius, planned or existing recreation and tourism offerings along the Elk River Trail System, and consumer profiles of visitors to other areas of West Virginia were used to gain an understanding of what future visitors to the Elk River Trail Towns will look like and how they'll interact with the Trail Towns. As shown in the figure to the right, visitation to the Trail Towns is anticipated to come from six different types of consumers: Day visitors, kayak anglers, heritage and cultural tourists, raftpackers, cyclists, and equestrian riders.



##### 3.1.1 Day visitors

Day visitors are individuals who stop in the area but either return home or travel elsewhere to spend the night. Day users represent all age groups and all activities, particularly boating, fishing, biking, and hiking.

These users typically make up the largest user group in terms of sheer number of visits to a trail town. Most trail systems see the bulk of users coming from within 1–2 hours away. Many of these visitors would stop in local restaurants and shops; however, since their visits are exclusively day trips, this group spends, on average, less than \$20 per visit.

##### 3.1.2 Equestrian riders

Horse trail riders include two key types of individuals: horse owners who bring their horses to ride the Elk River Trail, as well as other visitors taking part in a paid horseback trail ride. Experts estimate that the horse industry contributes \$50 billion to the U.S. economy, and studies indicate

the average horse rider spends \$125 in the local economy when traveling (American Horse Council, 2017; Equestrian Land Conservation Resource, 2015). However, much of the industry’s economic impact is derived from riders who travel to compete in horse shows. Those riding purely for recreation spend and travel less: According to a 2011 study, 75% of all recreational horse rides in Minnesota took place within 30 minutes of home (Schneider et al., 2011). This suggests that most horse riders would be day users, rather than overnight visitors. Based on this information, this report estimates the number of *overnight* horse users would be small, though nonetheless economically impactful. Given that they are traveling with horses, their lodging options are limited to those that can stable their horses overnight. Alternatively, the business prospects for a private stable offering commercial horse rides is very promising for the area, and participants would have wider lodging options available.

### 3.1.3 Cyclists

Cyclists include road, mountain, and gravel riders seeking out opportunities for overnight bike trips. National surveys have found that bicycling tourists are predominantly young professionals in their 30s and 40s with high expendable incomes, and they take an average of two trips per year to bike. The Elk River Trail Towns sit within a short trip distance—250 miles—of an estimated million cyclists (MRI-Simmons, 2022; ESRI, 2022). The average cycling tourist spends \$143 per day on a bike trip, which tend to be two or three nights in duration. While they sometimes camp, they often stay in cabins and AirBNBs, and they purchase half of all their meals in higher-end local restaurants (Barber, 2015). As the Elk River Rail Trail gains popularity, cycling tourism offers strong potential for the Elk River Trail Towns.

#### RAIL TRAIL USERS: A CASE STUDY

Self-reported day user spending data from a 2021 economic impact study of the Great Allegheny Passage found that rail trail users spend an average of \$90 per day (\$27.38 on restaurants and prepared food/drink, \$24.39 on indoor lodging, \$10.80 on groceries, \$9.41 at bike shops or rentals, \$5.89 at other types of retail establishments, \$5.06 on camping, \$3.85 on kayak or raft rentals, \$2.37 on shuttle services or gear, \$1.27 on admissions to museums or art galleries, and \$0.29 on customized trip planning or tour services). (Fourth Economy, 2021)



Source: REI (2020)

### **3.1.4 Raftpackers**

Raftpackers are boaters seeking a scenic overnight float trip down the Elk River. Young, outdoorsy adventurers are finding that pack-rafting offers a fun way to traverse the tailwaters of the Sutton Dam and down the Elk River Water Trail. Raftpackers will likely spend three to four nights camping over the course of a trip between Sutton and Mink Shoals. Starting in Sutton, the first stop may be at Elk River Campground in Frametown or a potential new campground in downtown Gassaway, the second near Groves Creek, and third at Wallback Wildlife Management Area upon completion of their all-day voyage. The smallest projected activity group, raftpackers nonetheless contribute mightily to the local economy: Assuming their rafts are available to rent through a local outdoor store or outfitter, the average raftpacker would spend an estimated \$110 per day.

### **3.1.5 Heritage and cultural tourists**

Heritage and cultural tourists are overnight visitors who will be drawn to the cultural and historical aspects of the Elk River Trail. These tourists account for 28% of overnight visitors to West Virginia (Longwoods International, 2019). Heritage tourism is a notable sector in West Virginia considering the state is a panorama of American history.

Recent studies have linked heritage tourists to significant visitor spending. According to a recent study of the state's top cultural destinations, 52% of surveyed heritage tourists traveled from more than 50 miles away from the destination, and about one-third traveled from more than 200 miles away. The study estimated that a historic site visit averaged a one-night hotel stay and generated about \$271. (PAWV, 2018; Craig, 2019)

This demographic will likely consist of older couples, mostly from West Virginia or nearby states, who are interested in the historic significance of the trails and other cultural amenities. Likely retired and with higher levels of income, heritage hikers are likely to be overnight visitors who would seek out local bed and breakfasts, hotels, cabins, or AirBNBs for one- or two-night stays. This demographic is most likely to interact with businesses in downtown Sutton, Gassaway, and Clendenin and to take part in other cultural events or amenities in the area.

### **3.1.6 Kayak anglers**

Kayak anglers are individuals who fish from kayaks and often participate in organized kayak angling tournaments. Kayak angling is a growing sector of Braxton, Clay, and Kanawha County tourism. Especially along the Elk River with a chance for anglers to haul in large muskies and walleye. As a result, kayak anglers could be a key user group for the Elk River Trail Towns to target given their towns' frontage and location.

As with all other forms of outdoor recreation, the economic impact from kayak anglers who stay in the county overnight is significantly higher than the impact of local fishermen. Fishing tournament participants include all ages, though many are over 40. Most are male, and a small percentage bring their families along. Most kayak anglers camp at the site of a tournament, though some rent cabins. They make daily purchases at local tackle shops and dine at local restaurants for dinner over the course of their typically two-night stay, bringing their estimated spending total to \$80 per day. (West Virginia Kayak Anglers, 2020)

**Table 6: Trail user profiles**

| User                          | Age range | Locality                             | Typical lodging preferences   | Typical dining preferences  | Other spending  | Estimate spending per day* |
|-------------------------------|-----------|--------------------------------------|---|---|---|----------------------------|
| Day visitors                  | All ages  | Local                                | Day users typically return home at the end of the day                           | A single meal or coffee   | Minimal   | \$20                       |
| Heritage and cultural tourist | 50+       | From West Virginia and nearby states | Likely to spend one or two nights at a local bed and breakfast, hotel, or cabin | Restaurants or cafes  | Likely to visit downtown Trail Town shops   | \$271                      |
| Cyclists                      | All ages  | From West Virginia and nearby states | Likely to spend two or three nights camping or at an AirBnB.                    | Riders typically dine out at higher-end local restaurants                       | Riders sometimes bring along their family members who seek shopping and other things to do in trail towns | \$143                      |
| Kayak angler                  | All ages  | From West Virginia and nearby states | Most spend two nights per trip. 75% camp, 25% reserve a bunk or cabin.          | Dinner in downtown both nights  | Daily purchases from local tackle shops   | \$80                       |
| Horse trail rider             | 40+       | From West Virginia and nearby states | If traveling with horses, lodging must have stables available                   | Restaurants or cafes  | Commercial rides through a local stable   | \$125                      |
| Raftpacker                    | 20–40     | From West Virginia and nearby states | Two – three nights camping between Sutton and Mink Shoals                       | Likely to go to restaurants and coffee shops at the start and end of their trip | Gear rentals and purchases from local outfitters  | \$110                      |

\* Note: While these visitor spending estimates were informed by a number of different sources, these were ultimately based on best professional judgement by Downstream.

### 3.1.7 Other users

The following additional categories of user groups are consumers that the towns could target in the future but were not explicitly examined for this study due to a lack of existing or planned infrastructure to support a large increase in visitors of this type.

#### Hunters

Hunters are a key existing user group in Braxton, Clay, and Kanawha County whose recreation opportunities could be enhanced. The mid-Atlantic is home to approximately one million hunters, including 787,000 deer hunters who spend approximately \$2.1 billion in retail sales in the region annually. Like cyclists, hunters are a user group that travels. Recent data indicate that Americans take over 140 million hunting trips per year, most of which are one-night outings where hunters spend \$147 per day. (Southwick Associates, 2018)



## Motorized trail riders

Motorized trail riders are visitors who come to ride off-highway vehicles on trails, including ATVs, side-by-sides, Jeeps, Hummers, and other ORVs. While there are currently a limited number of sanctioned and maintained offroad trails within the study area, the long-contemplated Rimfire ATV Trail Initiative of the Hatfield-McCoy Regional Recreation Authority would establish and promote substantial offroad trail riding opportunities in Braxton and Clay County. Further, ATV riding was identified by local citizens in each town as a recreation business opportunity they were interested in pursuing. This could also increase overall spending in the Elk River Trail Towns.

According to data from the Hatfield McCoy Regional Recreation Authority, 91% of the trail system’s total 56,000 visitors each year come from outside West Virginia. The majority of these visitors are middle-aged.<sup>1</sup> They travel in large groups,<sup>2</sup> and roughly 60% report spending 2–3 days riding per trip (CBER, 2020). Given the length of their stays, the size of their parties, and the gear-intensive nature of the sport, motorized trail tourists generate significant revenue for trail towns: Surveyed non-local respondents in 2019 spent \$1,156 *per trip*,<sup>3</sup> and 81% of surveyed respondents make multiple trips per year to the Hatfield-McCoy Trails (Center for Business and Economic Research, 2020).

### 3.2 Anticipated spending in the Trail Towns

Based on a review of consumer profiles and previous economic impact analyses of similar trail systems, an average daily spending of \$100 (2021 USD) per Trail Town visitor would be conservative. Given the consumer profiles examined in Section 3.1, the probable spending distributions listed in Table 7 below were established.

**Table 7: Anticipated visitor spending distributions**

| Category of event-related expenditure      | Visitor spending per day (2021 \$) | Distributions | Spending after margin (2021 \$) |
|--|------------------------------------|---------------|---------------------------------|
| Accommodations                             | \$26.17                            | 26%           | \$26.17                         |
| Retail and groceries                       | \$11.00                            | 11%           | \$3.65                          |
| Food at restaurants                        | \$27.92                            | 28%           | \$27.92                         |
| Alcohol at bars and taverns                | \$20.00                            | 20%           | \$20.00                         |
| Fuel                                       | \$14.54                            | 15%           | \$3.19                          |
| <b>Average Per Person Spending Per Day</b> | <b>\$100.00</b>                    | <b>100%</b>   | <b>\$80.94</b>                  |

<sup>1</sup> Over 79% of surveyed respondents were between the ages of 35 and 64 (CBER, 2014).

<sup>2</sup> More than 63% of surveyed respondents reported a group size of 3–8 riders per visit to the Hatfield-McCoy Trails (CBER, 2020).

<sup>3</sup> This is not a definitive per person, per day estimate, since the wording of the survey did not break out exactly how many days the respondent spent per trip, *or* whether that spending reflected multiple family members versus per person. Based on reviews of other off-highway trail destinations around the country, Downstream Strategies conservatively estimates typical spending well over \$200 per rider, per day.

### 3.2.1 Visitor projections

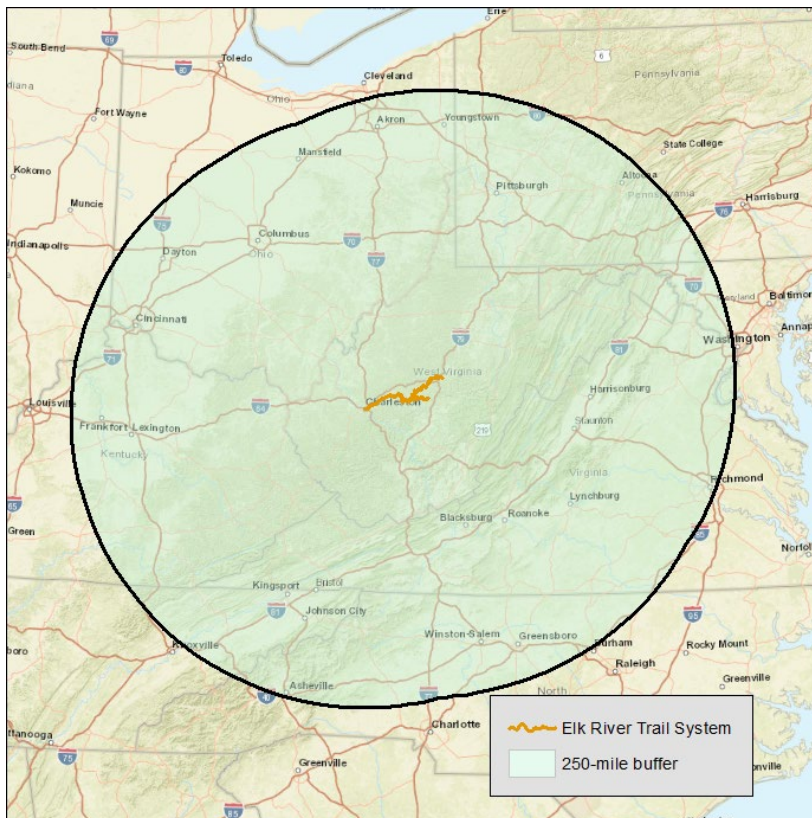
To establish trail town visitor projections, the project team reviewed visitation to comparable trail systems from neighboring states that attract similar users to the Elk River Trail System. Through this data review, four comparable trail systems emerged as particularly relevant: The Chesapeake & Ohio Towpath Trail, the Great Allegheny Passage Trail, the Ohio and Erie Canal Towpath Trail, and the Virginia Creeper Trail. Each of these four trails is in the mid-Atlantic region, accessible to urban users while still encompassing large rural sections. Additionally, each of these trails is adjacent to water resources, crosses large amounts of public land, and promotes use by a similar mix of users.

**Table 8: Comparable trail systems**

| Trail                           | State  | Trail length | Annual estimated visitation |
|---------------------------------|--------|--------------|-----------------------------|
| C&O Canal Towpath               | MD     | 185 mi       | 5,000,000                   |
| Great Allegheny Passage         | PA, MD | 150 mi       | 1,000,000                   |
| Ohio & Erie Canal Towpath Trail | OH     | 87 mi        | 2,500,000                   |
| Virginia Creeper Trail          | VA     | 34 mi        | 250,000                     |

Sources: NPS (2022), Fourth Economy (2021), Ohio & Erie Canalway (2022), Hanan (2015)

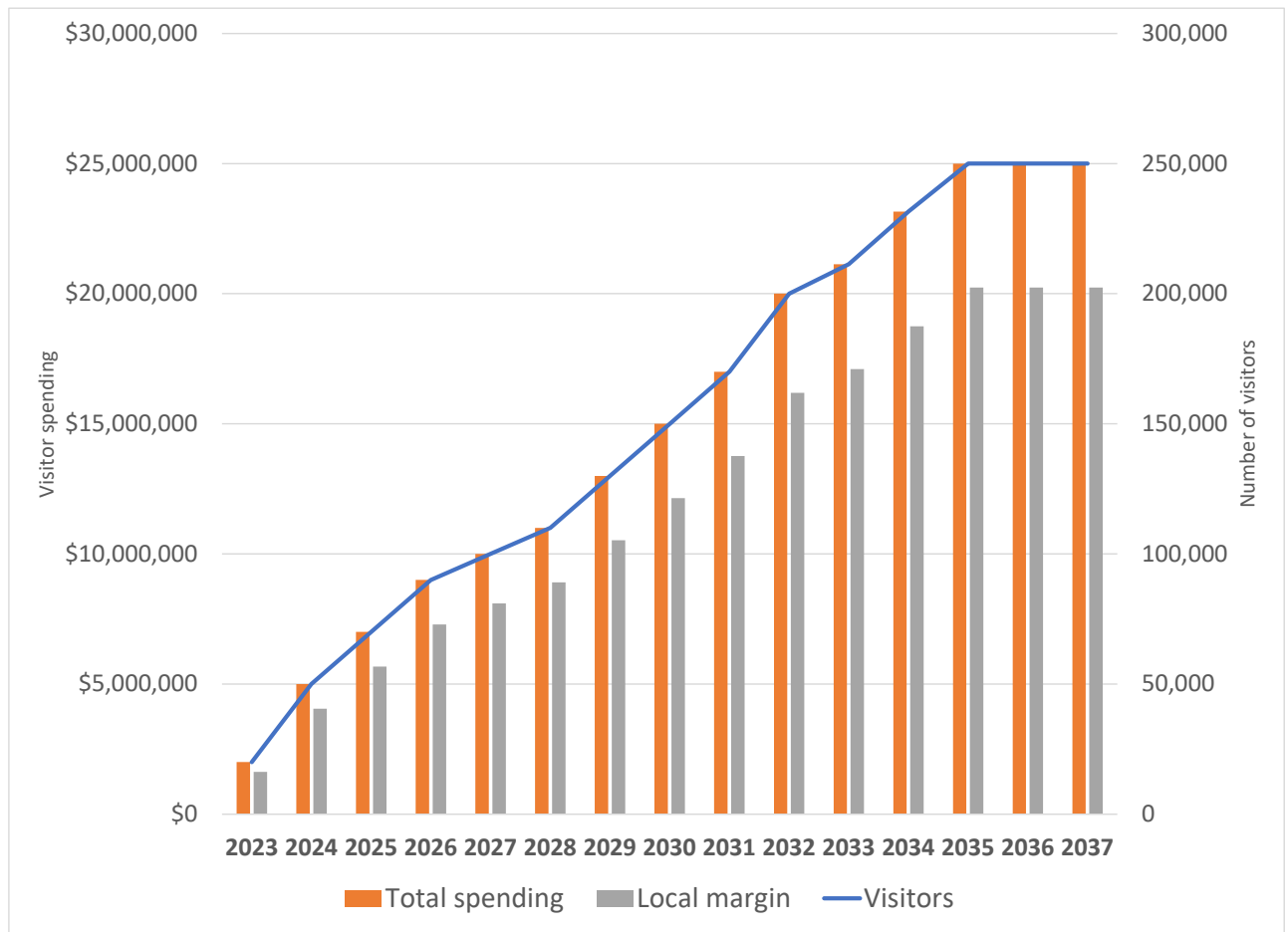
Based on an evaluation of the growth of these trail systems, the project team determined that the Elk River Trail System and Trail Towns could reasonably attract 150,000 visitors per year on average over the next 15-years. As the trail system gains popularity, total visitation will gradually increase, eventually reaching numbers comparable to the four trail systems explored in Table 8.



(Left) The Elk River Trail System and Trail Towns are within 250 miles or roughly a four-hour drive of over 27 million people

As shown in Figure 2, even under this modest visitation scenario, substantial local spending will occur in the Elk River Trail Towns over the next 15-years.

**Figure 2: Annual visitor spending over the next 15-years**



While most, but not all, Trail Town visitors will be utilizing the Elk River Trail, this magnitude of visitors would put visitation to the Elk River Trail System on the level as several state parks throughout West Virginia as shown in Table 9.

**Table 9: Total visitation to West Virginia State Parks**

| Park          | County         | Total party days/nights |
|---------------|----------------|-------------------------|
| Cathedral     | Preston        | 151,672                 |
| Beech Fork    | Cabell & Wayne | 191,835                 |
| Bluestone     | Summers        | 196,585                 |
| Little Beaver | Raleigh        | 210,315                 |
| Tomlinson Run | Hancock        | 140,506                 |
| Watoga        | Pocahontas     | 246,219                 |

Source: Magnini & Uysal (2015)

### 3.3 Impact of visitor spending

Visitor spending under the scenario described in in Section 3.2 will result in roughly \$250 million in new sales activity in the Elk River Trail Towns over the next 15-years. This spending would result in

nearly \$390 million in regional economic activity. This activity would support 195 full- and part-time jobs across different sectors of the economy. The team estimates 152 direct associated with new activity in the Trail Towns will provide nearly \$96 million in labor income to local residents, while the total regional effect on labor income is over \$141 million. Direct, secondary, indirect, and induced impacts of visitor activity are summarized in Table 10.

**Table 10: Economic impact of visitor spending over 15 years**

| Impact type     | Employment | Labor income  | Value added   | Output        |
|-----------------|------------|---------------|---------------|---------------|
| Direct effect   | 152        | \$95,947,860  | \$146,557,632 | \$247,066,212 |
| Indirect effect | 18         | \$20,236,632  | \$31,667,400  | \$64,227,276  |
| Induced effect  | 25         | \$25,325,316  | \$45,260,364  | \$80,802,540  |
| Total effect    | 195        | \$141,509,808 | \$223,485,396 | \$392,096,028 |

### UNDERSTANDING ECONOMIC IMPACT ESTIMATES

Economic impacts generally fall under three general categories.

- **Direct impacts** include the income and employment generated by the project itself. For example, a rail-trail project directly supports jobs for trained contractors.
- **Indirect impacts** include the income and employment in other industries that relate to the project. For example, a rail-trail project indirectly supports jobs and spending in the paving industry, as gravel and asphalt are key materials used for the trail.
- **Induced impacts** include a project’s impacts that circulate through other seemingly unrelated industries within the economy. For example, as a rail-trail project directly and indirectly supports local jobs, those workers will in turn spend more in the local economy at restaurants, stores, and other businesses. This secondary spending represents induced impacts from the rail-trail project.

## 4. RECOMMENDATIONS

The following recommendations offer practical guidance for local leaders as they work to encourage meaningful tourism development in the Elk River Trail Towns.

### 4.1 Business Development Opportunities

Entrepreneurs in the Elk River Trail towns have several business development opportunities both in the short- and long-term. In the short-term, business development opportunities fill existing voids in specific businesses and services. In the long-term, new sales activity from visitors to the Elk River Trail Towns will increase demand for restaurants, accommodations, and other recreation-related businesses.

Appendix D explores four business scenarios in more detail.

#### 4.1.1 Short-term

The tourism value-chain assessment, field reconnaissance, and SWOT analysis were utilized to develop short-term business development scenarios for each of the towns. These scenarios were

further informed by sales void analyses comparing the business makeup in each Elk River Trail Town to that of more well-established trail towns in the Mid-Atlantic<sup>4</sup>. The scenarios listed in Table 11 should be utilized by each town as rough business development goals for the immediate future as these businesses—in addition to the existing businesses—provide a solid foundation to serve the existing local population as well as an increased number of visitors.

Partners should utilize the proven *FASTER WV* model to provide business outreach, entrepreneurial and start-up support, business coaching, and business growth technical assistance to potential new Trail Town businesses and entrepreneurs.

**Table 11: Short-term business development goals**

| Town                | Short-term opportunities   |
|---------------------|--|
| Sutton <sup>5</sup> | <ul style="list-style-type: none"> <li>- One coffee shop (Opened in May)</li> <li>- Two additional full-service restaurants (Opened in May and August)</li> <li>- One local food market (could be standalone or at another business)</li> <li>- One outfitter/shuttle service with a heavy focus on boats/water</li> <li>- Five additional short-term rentals</li> </ul> |
| Gassaway            | <ul style="list-style-type: none"> <li>- One additional full-service restaurant</li> <li>- A bike rental/sporting goods store</li> <li>- One RV campground with equestrian accommodations</li> <li>- Five additional short-term rentals</li> </ul>   |
| Clay                | <ul style="list-style-type: none"> <li>- One additional full-service restaurant</li> <li>- A café/gear rental shop (Bikes, Boats, n' Brews)</li> <li>- Three to five guest cabins near Dundon</li> <li>- Five additional short-term rentals in town</li> </ul>   |
| Clendenin           | <ul style="list-style-type: none"> <li>- One full-service restaurant</li> <li>- One small-medium sized grocery store</li> <li>- Five additional short-term rentals</li> </ul>  |

Economic impact estimates of implementing these short-term business development goals are provided in Appendix B.

#### 4.1.2 Long-term

New sales activity from visitors to the Elk River Trail Towns will increase demand for restaurants, accommodations, and other recreation-related services. This creates even more opportunity for new small businesses, in addition to those short-term opportunities explored above. Based on the projected demand on industry, the location of existing businesses, and anticipated short-term business development, the Elk River Trail Towns should pursue the following long-term opportunities to meet the expected demand of tourists to the area over the next 15-years.

Similar to supporting short-term opportunities, Partners should utilize the proven *FASTER WV* model to provide business outreach, entrepreneurial and start-up support, business coaching, and business growth technical assistance to potential new Trail Town businesses and entrepreneurs.

<sup>4</sup> The project team utilized ESRI Business Analyst Advanced to complete a void analysis comparing each of the Elk River Trail Towns to Confluence, PA; Meyersdale, PA; Ohiopyle, PA, Cumberland, Maryland; Davis, West Virginia; Thomas, West Virginia; Damascus, Virginia.

<sup>5</sup> It is worth noting that between the time these scenarios were developed, and this plan was released, a coffee shop and two additional full-service restaurants already opened in Sutton.

**Table 12: Business opportunities over the next 15-years**

| Town      | Medium-term business opportunity  |
|-----------|---|
| Sutton    | <ul style="list-style-type: none"> <li>· 5 additional short-term rentals</li> <li>· 2 limited-service restaurants</li> </ul>  |
| Gassaway  | <ul style="list-style-type: none"> <li>· 5 additional short-term rentals</li> <li>· 2 limited-service restaurants</li> <li>· 1 full-service restaurant</li> </ul>                             |
| Clay      | <ul style="list-style-type: none"> <li>· 5 additional short-term rentals</li> <li>· 2 limited-service restaurants</li> <li>· 1 full-service restaurant</li> <li>· 1 gas station</li> </ul>    |
| Clendenin | <ul style="list-style-type: none"> <li>· 5 additional short-term rentals</li> <li>· 2 limited-service restaurants</li> <li>· 1 full-service restaurant</li> <li>· 1 boutique hotel</li> </ul> |

### WHAT IS A SHORT-TERM RENTAL?!?!

Short term rentals (STR) and platforms like Airbnb and VRBO have revolutionized how people travel and book accommodations. STRs are residential units that are rented out for days at a time rather than months. STRs can benefit trail towns by providing lodging space quickly using existing commercial spaces. Online platforms provided by Airbnb and VRBO allow property owners to recoup their investments. Additionally, much of the building stock in the trail towns have unoccupied space above ground floor commercial units. STRs allow productive use of square footage that may have been underutilized and ultimately enhance properties in the central business district.

### BLACKWATER BIKES: A CASE STUDY IN DIVERSIFICATION

Blackwater Bikes in Davis has grown into one of West Virginia’s premier bike shops. The shop offers top-quality bikes for sale and rent, as well as a full-service bike repair department with expert mechanics on staff. Blackwater Bikes is a key fixture of the community.

In examining their business model, the owners realized the only way they could compete with online retailers like Amazon was to keep their overhead low and offset the cost of their building. As a result, they bought a riverfront lot across the street from their former rented location downtown, financed by a local bank devoted to investing in the community. They built a new building to house the bike shop on the main floor plus a separate vacation rental on the ground/basement level. Having multiple income streams ensures that the business can thrive even when store sales are slow. In fact, according to Stull, “the vacation rental brings in way more income than the bike shop! And it allows us to keep the shop’s rent affordable.” (Stull, 2021)

## **4.2 Infrastructure and community improvement projects**

In order to ensure the success of the Elk River Trail Towns, stakeholders should implement the following infrastructure and community improvement recommendations.

### **Educate the greater community about tourism opportunities**

As shown previously, even modest numbers of trail visitors could result in millions of dollars of local visitor spending.

Even though the community is generally supportive of tourism, many simply do not yet fully grasp just what trail and tourism development could mean for the area. Therefore, community education is the first critical step to educate local leaders about tourism opportunities and how impactful trail and tourism opportunities can be for the area.

This report can be used by stakeholders to educate the community about the achievable positive benefits of tourism in the Elk River Trail Towns.

### **Inventory investment-ready projects**

Local leaders should create (and maintain) an inventory of business concepts and other projects that are ready for investment and implementation. This inventory can be initially populated with the business opportunities highlighted in this report. Having a formal list of specific investment-ready tourism projects will help local leaders and the community better respond to funding opportunities.

The Elk River Trails Foundation can publish or otherwise share the inventory with the greater community, which will also promote a local culture of entrepreneurship and provide clear, tangible goals that community members can work towards as they check off the businesses and projects identified on the list.

Creating this inventory as a repository for community business ideas is the natural first step; however, as with any list, this inventory will only be helpful so long as it is maintained and kept current. As a result, it should be treated as a living document to be updated and revisited over time.

### **Develop accessible kayak launches in each community**

Downstream Strategies recommends pursuing the development of four accessible kayak launches along the Elk River Water Trail, one within easy access to each of the trail towns' central business district. Eventually, these launches should all follow the same general design guidelines and include parking (5-10 dedicated spaces), wayfinding signage to businesses and other attractions in town, secure kayak storage lockers, and an EZ Dock kayak launch system. It may also become necessary to add low maintenance pit latrines or flushable toilets at each location. Appendix C provides recommendations and conceptual designs for the location of these launches in each community.

## Support and expand existing facade improvement programs focusing on Main Street and trail-side buildings

To increase the economic vitality of downtown communities in Braxton County, the County Development Authority and Commission have established the Blighted, Abandoned, and Dilapidated Buildings Upgrade and Removal Fund. In addition to providing assistance to building owners wishing to demolish problem structures, the fund provides \$10,000 facade renovation grants and design technical assistance to property owners and businesses wishing to improve the appearance of their buildings. This program was established utilizing a grant from the Department of Housing and Urban Development's Economic Development Initiative. Trail towns not currently covered by the Blighted, Abandoned, and Dilapidated Building Upgrade and Removal Fund should work with their County Commissions to pursue funding through HUD to expand this program to their community.



(Right) The Elk River Rail Trail passes by the rear of buildings in the downtown area of Gassaway. (Below) Renovation of trail-side buildings, including extensive facade improvement, provides a much more welcoming environment. Further, the addition of trail-side entrances to buildings creates an opportunity for easy access to businesses.





## RENOVATIONS AND PROGRAMMING AT THE GASSAWAY DEPOT

Few buildings in West Virginia are as iconic as the Gassaway Depot and its position along the Elk River Trail makes it the ideal location for a whole myriad of economic development activities and programming. While substantial renovations have already taken place to stabilize the building, additional renovations are needed to bring it into productive use. Further, regardless of what activities ultimately take place at the Depot, the land surrounding it needs landscaped and beautified.



One end-use option that has worked for similarly iconic buildings, is for the Depot to be repurposed as an event/meeting center with limited accommodations on the second story. This end-use option would bring new people into Gassaway to attend weddings; meetings; or other events, which would provide other local businesses with potential customers. A limited number of event attendees or other guests could stay the night at the Depot in the short-term rentals on the second floor. When the building is not in use for events, the short-term rentals on the second floor would be in high demand by trail users.

### What's needed?

- An outdoor seating area should be added between the building and the trail. The Depot's large doors could be opened to accommodate event guests both inside and out.
- A commercial kitchen would need to be added to the main level to accommodate food preparation for the events space. This kitchen could also be used to operate a trailside café when the building is not rented for events.
- Extensive renovations would need to take place on the second story to develop a small number of short-term rentals.

### Establish at least one trail connection in each community

Initial attention should be given to establishing a trail connection between the river- and rail-trail and the primary business area within each of the towns. These trail connections should follow the same general design guidelines and include sidewalks wide enough to facilitate a bidirectional flow of pedestrian traffic, low maintenance landscaping, and directional signage. For example, the map below shows a proposed improvement to the sidewalk along 5th Street in Gassaway to facilitate the movement of people from the trail into the downtown area. 5th Street is likely to serve as the trail connection between downtown Gassaway and the rail trail.



As shown in the renderings in Appendix C, the establishment of a river access location at the Aaron James property in Sutton would provide direct access to the downtown business district along existing sidewalks on 2nd Street and Lion Street. The Elk Street Bridge will serve as a connector between the rail trail and future river access location in Clay. Both the Water and Rail Trail route directly to Clendenin's central business district, so only directional signage is needed.



(Left) A photo simulation of the 5<sup>th</sup> Street trail connector in Gassaway, shows a widened sidewalk that allows bi-directional flow of people, low maintenance landscaping, and clearly marked street parking and crosswalks. (Below) shows the current conditions.



### **Keep construction dollars within the local economy**

Including local purchasing preferences or requirements in any necessary competitive bidding process is an easy way to keep money used for the construction and ongoing management of the trail system in the local community. Whatever entity that puts out Requests for Proposals for construction tasks and associated programmatic tasks should include language expressing a preference or requirement that the contract be filled by local entities.

### **Advocate for infrastructure projects through Planning and Development Councils**

The regional planning and development councils covering the Trail Towns have identified more than \$15 million in priority infrastructure improvement projects in or near the towns (Region III, 2021; Whitehair, 2022). It is impossible to know what percentage of these and other infrastructure improvement projects will be completed and on what timeline. However, the regional planning and development councils should be utilized as an outlet to advocate for projects that address the critical infrastructure issues facing each of the trail towns, particularly those issues related to water infrastructure.

### 4.2.1 Long-term

While building out a trail system is a critical first step, overtime, communities will need additional capacity building assistance to realize a sustainable economic boost from land- and water-based trail development.

First-time entrepreneurs in rural communities often start at a disadvantage. In West Virginia, as in much of rural America, those coming from geographically isolated, economically depressed areas may not have been exposed to thriving local businesses. Without experienced local mentors, they may find themselves lacking the basic understanding of management, accounting, and marketing principles needed to start and run a successful business.

For communities new to tourism, developing a local hospitality industry can be a challenge. As a result, training programs focused on helping local workers prepare for jobs in the tourism and hospitality sectors can be tremendously valuable, particularly for areas with nascent tourism economies.

Workforce development for trails and recreation can take many different forms and should be a key part of the Elk River Trail Towns' work. Local leaders should consider partnering with academic institutions to bring hospitality- and tourism-focused workforce development programs to the area. Local leaders should consider WVU's new Outdoor Economic Development Collaborative<sup>6</sup> as well as Marshall University's Department of Sport, Tourism & Hospitality Management as potential collaborators. As highlighted elsewhere, community leaders should also be prepared promote FASTER WV workshops on business development and business planning in each community.

*Through the FASTER WV Initiative, Advantage Valley and its partners are building a stronger culture of entrepreneurship, providing small business owners with access to markets, financing, and education*

### 4.3 Wayfinding signage

With additional visitors who may not be familiar with the Elk River Trail and how to get around the different trail towns, wayfinding signage provides an easy solution to communicate with trail users and keep them safe and oriented on the trail and other destinations. This section of the report is intended to describe the current state of wayfinding in the trail towns, define the different types of wayfinding signage with preliminary costs, provide signage locations, and supply recommendations to orient trail users to popular destinations.

#### 4.3.1 Wayfinding observations

Wayfinding refers to the information systems that guide people through a physical environment and enhance their understanding and experience of the space. Along trail systems, this is done primarily through signage, but can also be accomplished via web applications and other tools. Place-appropriate wayfinding is critical to move people from the Elk River Trail System and other recreation destinations to the Trail Towns and businesses therein.

Some wayfinding signs exist in each of the Trail Towns; however, most existing signs are outdated and very few direct people between destinations and businesses.

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<sup>6</sup> <https://provost.wvu.edu/centers-institutes/oedc>

### 4.3.2 Wayfinding Principles

The wayfinding principles are provided to optimize wayfinding signage amongst each of the Trail Towns. The three wayfinding principles ensure the development and implementation of signage is cohesive and celebrates each Trail Town.

- **Consistency** amongst signage is essential for branding the trail, legibility of signs, and promoting safety.
- Wayfinding design must be based on the user's **arrival**. Specifically, sign locations must contemplate car-oriented, trail-oriented, and/or river-oriented trail users.
- Design wayfinding based on the **first-time users**. First-time users should feel confident they arrived at a trail town, they can find their destination, and they can find their way back to the trail.

### 4.3.3 Wayfinding Signage Types

Trailside signage is important not only to inform trail users about the rules, etiquette, and safety, it is also imperative to establish important downtown connections for trail town businesses. This section will discuss the different types of trail signage: 1) gateway signs, 2) kiosk signs, and 3) directional signs. These sign design recommendations are conceptual in nature.

#### Monument Signs

Monument signs are larger signs that announce to visitors their arrival to a destination or district. These signs should be sited on primary routes where visitors first encounter the central business district. Currently, all four trail towns have signs welcoming and informing visitors of the town boundaries.

Anticipated Cost: \$2,000 each + 15% Contingency = \$2,300. Construction fees (15%) = \$2,875.



## Kiosk Signs

The second type of wayfinding signage is kiosk signs. Kiosk signs are used at the beginning of a trail or trailhead and provide detailed information that trail users may use while not actively using the trail. Information offered on a kiosk sign includes trail rules and etiquette, an overall trail map to help find a destination or plan your day on the trail, and interesting sights along the trail. Kiosk signs can also include protected bulletin boards to allow easy to adjust and up to date flyers about events offered in town. Each trail town should have one or two kiosk signs. Kiosk signage should include:

- Elk River Trails branding
- Regional map that includes the Entire River Trail
- Town map
- Business directory with locations
- Trail rules
- Facts and history of the town

Anticipated Cost: \$2,000 each + 15% Contingency = \$2,300.

(Right) A mockup of a trail kiosk sign developed by students at WVU.

For the proposed water access areas discussed in Appendix C, a traditional, US National Park style trail head kiosk should be used like the examples shown below.



Anticipated Cost: \$5,000 each + 15% Contingency = \$6,250. Local sign designer and manufacturer, Lens Creek Studios, includes delivery and installation for anticipated costs. (Above) A timber frame kiosk developed by TimberHomes Vermont

## Directional Signs

Finally, directional signs help trail users find their way to a desired destination. Many wayfinding signs provide directions to amenities like downtown attractions, campgrounds, parking, and restrooms. Directional signage is used off the trail to guide users to a business and steer users back to the trail.



(Above) A sign in Travelers Rest, South Carolina provides directions to nearby attractions.

### 4.3.4 Cost Summary

The tables below include an estimate of the anticipated costs for the proposed wayfinding signage improvements in each trail town.

**Table 13: Sutton signage cost estimate**

| Sign type        | Quantity | Estimated unit cost | Total cost |
|------------------|----------|---------------------|------------|
| Monument sign    | 1        | \$2,875             | \$2,875    |
| Kiosk sign       | 1        | \$2,300             | \$2,300    |
| Directional sign | 3        | \$1,532.50          | \$4,687.50 |
| Total            | 5        |                     | \$9,862.50 |

**Table 14: Gassaway signage cost estimate**

| Sign type        | Quantity | Estimated unit cost | Total cost |
|------------------|----------|---------------------|------------|
| Monument sign    | 1        | \$2,875             | \$2,875    |
| Kiosk sign       | 1        | \$2,300             | \$2,300    |
| Directional sign | 3        | \$1,532.50          | \$4,687.50 |
| Total            | 5        |                     | \$9,862.50 |

**Table 15:Clay signage cost estimate**

| Sign type        | Quantity | Estimated unit cost | Total cost |
|------------------|----------|---------------------|------------|
| Monument sign    | 1        | \$2,875             | \$2,875    |
| Kiosk sign       | 1        | \$2,300             | \$2,300    |
| Directional sign | 2        | \$1,532.50          | \$3,065    |
| Total            | 4        |                     | \$8,240    |

**Table 16: Clendenin signage cost estimate**

| Sign type        | Quantity | Estimated unit cost | Total cost |
|------------------|----------|---------------------|------------|
| Monument sign    | 1        | \$2,875             | \$2,875    |
| Kiosk sign       | 1        | \$2,300             | \$2,300    |
| Directional sign | 2        | \$1,532.50          | \$3,065    |
| Total            | 4        |                     | \$8,240    |

### 4.3.5 Wayfinding Locations

For each trail town, maps are provided with the proposed locations for each wayfinding sign. The locations are determined based on the three principles of consistency, arrival, and first-time users. Additionally, primary corridors and focal points like municipal buildings were considered for an effective sign plan. The maps are provided in Appendix F.

### 4.3.6 Wayfinding Recommendations

Based on the wayfinding signage types and general wayfinding principles, the following recommendations are provided for each trail town.

- Conduct a visual preference survey with a wayfinding committee to determine final sign designs.
- Coordinate with the West Virginia Department of Natural Resources to provide a business directory and wayfinding at each Elk River Trail trailhead kiosk.
- Provide US National Park style kiosk at the proposed water access areas.

## 4.4 Marketing

Marketing will play a major role in the Trail Towns' ability to survive and thrive. Destinations and hospitality business owners across West Virginia rely on active, consistent marketing—particularly through digital media—to gain and maintain a following of customers.

Recognizing each community and its volunteers have limited time and resources, the following marketing elements are prioritized by order of importance to direct local leaders in items to pursue first. The Elk River Trails Foundation should play a central role in coordinating each of the following elements.

### 4.4.1 Branding

First, the Elk River Trail Towns need to develop a brand for themselves. This can be done both independently and as part of a system of trail towns; however, initial efforts should be focused on developing branding that can be utilized by all four trail towns. All subsequent materials and outputs



in this action plan will need to be based on the brand that the towns come up with, so developing this brand concept reflects the true starting point for the Elk River Trail Towns' marketing efforts.

The Elk River Trails Foundation has already worked with professors at West Virginia University to create a logo for the Elk River Trails and Trail Towns; however additional attention should be given to the following brand components:

1. **The overall brand concept** for the Elk River Trail Towns as a destination. This brand should capture the best of what the Trail Towns have to offer as well as what they hope to become from a recreation and tourism perspective. The Trail Towns' brand should play on their strengths as friendly small towns, steeped in history, with easy access to multi-use trails that cut through some of West Virginia's most-scenic countryside. It should also align with the overall brand of the Elk River Trail System, Elk River Trails Foundation, and Convention & Visitors Bureaus in each county.
2. **A tag line** that captures that brand in one short sentence or phrase. While many towns and cities have official tag lines for governmental entities, this tag line should focus specifically on the Trail Towns from a tourism perspective. Relevant examples include:
  - a. Pocahontas County, WV: "Nature's mountain playground"
  - b. Alleghany County, MD: "The mountain side of Maryland"
  - c. Confluence, PA: "Where mountains touch rivers"
  - d. Gatlinburg, TN: "The mountains are calling"

#### 4.4.2 Website

Once the brand standard is established, the Elk River Trail Towns will need a tourism-focused website. The purpose of this website is to highlight the Trail Towns local recreation and tourism amenities and help potential visitors plan a trip to the Elk River Trail System. To date, the Elk River Trails Foundation's website, <https://elkrivertail.org/>, has served as the defacto hub for tourism information related to the Elk River Trails and Trail Towns. The Foundation is currently undertaking an effort to improve and expand the information available through this webpage.

When it comes to websites, looks matter. A modern, professional-looking website is a fundamental requirement for any trail town seeking to attract visitors. Appendix E presents a few relevant examples of websites from trail towns across the nation that have maintained a well-organized, professional branding campaign for outdoor recreation tourism.

#### 4.4.3 Photography and video

Just as appearances matter with websites, high-quality photos and videos are vital in attracting visitors in today's digital world. Social media trends show that viewers are more drawn to eye-catching photos and videos than text-heavy webpages, so modern websites and social media platforms are designed around high-resolution imagery. Low-resolution photos come across on these platforms as fuzzy and amateurish, even to the untrained eye.

As a result, the Trail Towns should plan to invest in high-resolution, professional photography and videography which can be used across all aspects of its marketing materials. A budget of \$1,500 - \$2,500 should be adequate to provide a range of high-resolution photos and basic drone footage of each of the Trail Towns. Photos and video should be updated periodically, as new businesses and amenities are established.

#### 4.4.4 Social media

Social media can be a very effective strategy to connect the Trail Town's brand with far-reaching audiences across the country. The following social media platforms are frequently used in conjunction with tourism promotion campaigns:

- **Facebook:** Facebook is one of the most used social media platforms in the world and could be a powerful tool for the Trail Towns to utilize for this campaign—particularly for promoting tourism-focused events. Setting up an organization or business page is easy and free. Step-by-step guides to setting up a Facebook business page are available at [businessinsider.com/how-to-create-a-facebook-business-page](https://businessinsider.com/how-to-create-a-facebook-business-page).
- **Instagram:** Instagram is a social media platform specifically geared toward posting photos and videos. Hashtags (such as #yakpacking, #muskiefishing, etc.) can be used strategically to reach targeted user and interest groups from around the country and the world. By creating a hashtag and promoting it on the website, across other social media campaigns, and on print material, a buzz could be created through Instagram by encouraging visitors or local businesses to post their local photos with #ElkRiverTrail, #Sutton, #Gassaway, #Clay, #Clendenin, #ElkRiverTrailTowns, or other memorable lines. Once the campaign is up and running, a photo contest, for instance, could be an engaging way to create hype about local hotspots and put Instagrammers to work marketing the town. To create an account, visit [instagram.com](https://www.instagram.com).
- **YouTube:** A YouTube channel would be a fun and easy way to market videos about local attractions to gain traveler interest each of the Trail Towns. A great example of this method is on Gatlinburg's channel (<https://www.youtube.com/c/gatlinburg>) which highlights travel guides, hiking trails, and seasonal events.

Before launching social accounts, Elk River Trail Town leaders should be aware that it takes a lot of work to build and maintain a social media presence. Effective social media accounts carefully curate their content in a way that comes across as effortless yet coordinated. Behind the scenes, that curation takes thorough planning and thought on what and when to post.

A social media platform should only be pursued if local partners are committed to following a regular posting schedule and keeping the channel up to date. The Elk River Trails Foundation and its partners should weigh the different social media platforms and decide which they feel ready to start with. They should also designate a specific entity or individual to serve as the social media manager.

Next, lay out a social media strategy to curate a schedule for posting specific types of content on each platform, being sure to consistently present the Trail Towns' brand throughout. A tourism-focused presence for the Elk River Trail Towns that mirrors the branded logo, tagline, and website should be utilized across all chosen platforms such as Facebook, Instagram, and YouTube. There are several services that make keeping up with multiple platforms easier than ever, like [hootsuite.com](https://hootsuite.com).

#### 4.4.5 Digital ads

Digital ads—both through social media platforms and through web-based services—have become affordable and effective ways to reach targeted audiences online.

The most popular tool for web-based ads is through Google's service Google Adwords. This service is easy to set up and monitor and works with any budget. The tool allows web marketers to choose phrases that would drive targeted web traffic to their website. For example, terms such as "kayaking West Virginia" would trigger an ad for the Elk River Trail Towns to pop up on the search results for potential visitors to click on. A list of key phrases that will drive the appropriate audiences to the site

is important for this initiative. More information on Google Adwords is available at: [ads.google.com/home/how-it-works/](https://ads.google.com/home/how-it-works/)

In addition, Facebook and Instagram offer customized, targeted ad services that can be tailored to very specific audiences: For example, the Elk River Trails Foundation could set up a Facebook ad (ex. “Elk River Trail Towns: Experience authentic West Virginia on horseback”) that would be seen by men and women ages 40+ throughout the Mid-Atlantic with interests in horses—in other words, the demographic for a horse trail rider. This is a great way to drive traffic to a website or to a particular action on the site for a very modest budget. More information on Facebook ads is available at: [facebook.com/business/ads](https://facebook.com/business/ads)

#### 4.4.6 Print materials

Most trail visitors today use smartphones to identify places to eat, shop, and stay in a town and navigate directly to each location. As a result, print materials are less dominant and necessary today than in years past. However, paper maps—particularly those orienting visitors to the trails, downtown businesses, services, and key points of interest—are useful and still widely used by visitors.

When it comes to print materials, the Elk River Trail Towns should, at a bare minimum, plan on producing a visitor-oriented downtown map showing trailheads, restaurants, lodging, points of interest, and key services downtown.

#### 4.4.7 Billboards

Finally, the Elk River Trail Towns could consider billboards to promote the area on main thoroughfares throughout the state. Billboards in nearby cities and towns would benefit the tourism market in the Elk River Trail Towns by capturing travelers already in the area. All signage should include the branded logo and the website. Some towns and cities to consider for signage locations:

- Elkins (Rt 219)
- Snowshoe (Rt 219)
- Lewisburg (I-64/Rt 219)
- Summersville (Rt 19/Rt 39)
- Flatwoods (I-79)
- Charleston (I-79/I-64)
- Clarksburg (I-79/Rt. 50)
- Morgantown (I-79)

Outdoor advertising providers in West Virginia include:

- WV Outdoor: [wvoutdoor.com](http://wvoutdoor.com)
- Lamar: [lamar.com/Bridgeport](http://lamar.com/Bridgeport)
- Micro Outdoor: [microoutdoor.com](http://microoutdoor.com)



<https://www.michigansthumb.com/news/article/Pure-Michigan-uses-local-photographer-s-work-14015688.php>

### 4.5 Funding opportunities

Many resources are available for entrepreneurs interested in starting small businesses and for making other community improvements to prepare the Elk River Trail Towns for an increased number of visitors.

#### 4.5.1 Small business development assistance

Many resources are available for entrepreneurs interested in starting small businesses in West Virginia.

- Advantage Valley's **Fostering Advantages for Start Ups and Entrepreneurial Resurgence in West Virginia (FASTER WV) Initiative** provides workshops, entrepreneurship training, business coaching, and a revolving loan program for businesses that serves participants in the outdoor recreation industry or provides support to businesses that serve that industry.
- The **U.S. Small Business Administration's (SBA's)** West Virginia District Office in Clarksburg provides prospective, new, and established persons in the small business community with financial, procurement, management, and technical assistance. The SBA provides training and counseling on starting and/or expanding businesses, assists bank and non-bank lenders in securing SBA loans for their small business customers, and provides trainings for small businesses on how to do business with the federal government. (SBA, 2020)
- The **West Virginia Small Business Development Center (SBDC)** is a statewide network that provides assistance in all 55 counties. SBDC helps small businesses from the concept phase to established enterprises and offers training in business planning and development, coaching, financing recommendations, and more. SBDC can help compile all the preliminary information and paperwork needed to open a business legally, including information on licensing, taxes, insurance, recordkeeping, and the forms needed for hiring employees. SBDC can also assist with evaluating a business idea for feasibility and projected success and can provide hands-on assistance in obtaining loans. SBDC has business coaches/managers based in Charleston and Summersville and periodically offers trainings and workshops in other locations. (WVSBDC, 2020)
- The **West Virginia State University Community & Economic Development Program** offers extension agents and services focused on community development and revitalization, regional and local economic development, and small business development. The program offers targeted support for small business development, retention, and expansion efforts with emphasis on artisan and the creative economy sectors. Services include incubation, mentoring, access to capital assistance, entrepreneur training, management strategies, marketing, counseling on collaborative development, business plan assessment and strategies for expansion.
- The **West Virginia Community Development Hub's Communities of Achievement Program (HubCAP)** offers support for communities as they take their community development efforts to the next level. The Hub's staff serve as coaches, connecting the community with capacity building resources needed to achieve the town's goals. (HubCAP, 2020)

In addition, training and mentoring opportunities specific to hospitality and outdoor recreation industries are recommended.

- **West Virginia University (WVU) Extension** offers a tourism specialist who coordinates the WVU Rural Tourism Design Team. The Team provides research, training, and technical assistance support for sustainable rural tourism development throughout West Virginia. Partnerships with Recreation, Parks, and Tourism Resources; Landscape Architecture; Graphic Design; Public Administration; and other colleges and departments at WVU provide a depth of knowledge and expertise strategically targeted to support the development of a sustainable tourism economy in West Virginia. (WVU Extension, 2020)

- **West Virginia Welcome**, designed by the West Virginia Hospitality Education and Training Program, is a collaboration between WVU's Hospitality and Tourism Program, West Virginia Department of Education's HEAT program, the West Virginia Hospitality and Travel Association, and the WVU Extension Service. The program offers introductory courses on hospitality, available as a 45-minute online video course and through two-hour classroom-style trainings. (WVU Extension, 2020)

#### 4.5.2 Federal grant programs

There are several recurring federal programs that should be on the Trail Towns' radar:

- **Abandoned Mine Land Economic Revitalization Grants:** Economic development projects near abandoned coal mines may qualify for federal Abandoned Mine Lands Economic Revitalization (AMLER) grants, which are administered locally by the West Virginia Department of Environmental Protection. The State gives out \$25 million a year through this program.
- **POWER Grants:** The Appalachian Regional Commission's Partnerships for Opportunity and Workforce and Economic Revitalization (POWER) Initiative targets federal resources to help communities and regions that have been affected by job losses in coal mining, coal power plant operations, and coal-related supply chain industries due to the changing economics of America's energy production.
- **U.S. Department of Agriculture (USDA) Rural Development Grants:** Dozens of USDA grant and loan programs are relevant to community revitalization and trail initiatives, including the Community Facilities Direct Loan & Grant Program and the Rural Business Development Grant Program.
- **Community Development Block Grants:** Public-private partnerships present additional opportunities for putting together funding solutions for innovative economic development projects. Public entities have access to recurring federal funding streams, like Community Development Block Grants, which have priorities and goals that are complementary to downtown tourism development efforts. These funding streams can and should be used as leverage or a match.
- **U.S. EDA Economic Adjustment Assistance Program:** The Economic Adjustment Assistance program is EDA's most flexible program, and grants made under this program will help hundreds of communities across the nation plan, build, innovate, and put people back to work through construction or non-construction projects designed to meet local needs. A wide range of technical, planning, workforce development, entrepreneurship, and public works and infrastructure projects are eligible for funding under this program. As part of the \$300 million Coal Communities Commitment, EDA will allocate at least \$200 million of the Economic Adjustment Assistance funding to support coal communities.

## 4.6 Policies to promote tourism friendly towns

Policy can both enable and inhibit the growth of outdoor recreation and tourism as an economic engine in the communities surrounding the Elk River Trail. Based on the findings of this project, here are some policies stakeholders may find helpful.

### 4.6.1 Equine urine and manure cleanup requirements

The issues of equine urine and manure are often cited for lackluster trail user experiences. In some instances, cleanup is not practical. However, some jurisdictions have adopted requirements for diapering apparatus and sanitation communication. This is not practical for recreational equestrian riders. Therefore, a standard should be implemented and posted to detail manure disposal requirements. American Trails, a highly regarded trail training resource since 1988, provides the appropriate expectations for cleanup based on location and trail material. (Goerlich, 2022)



(Above) Equestrian riders saunter down the Elk River Rail Trail in Dundon. Photo courtesy of Ken Tawney.

### 4.6.2 Other horse-friendly policies

Equestrian users will need additional resources to enhance their experience and spend more time on the trail. To that end, four horse-friendly policies are recommended. First, equestrian staging areas should be developed near parking areas. A staging area allows horse owners to park trailers for the day while they enjoy the trail. Second, horse-back riding etiquette and trail sharing guidelines should be posted at trailheads. Specifically, guidelines should remind trail users when trail conditions require right of way to navigate safe passage, equestrian users have the right of way. Following equestrian users, hikers have the right of way. Third, each trail town should consider adopting explicit allowances for equestrian users to operate on city streets that serve businesses. Additionally, hitch posts should be installed to encourage users to visit shops. Finally, each trail town should

provide an equestrian resource list with information about local equestrian facilities where boarding is provided.

### 4.6.3 Town-sponsored kayak/boat storage

Despite the success of many water trails throughout the country, the main impediment for water users to visit trail towns is the lack of kayak or boat storage. Kayak lockers allow users to store their kayak confidently while they spend extended stays shopping and eating. Town-sponsored kayak/boat storage should be provided at river access points near popular destinations.

### 4.6.4 Accessory dwelling units

Overnight visitors spend more time and money in trail towns. A solution to increasing trail town lodging occupancy is to promote accessory dwelling units or ADUs. Also known as carriage houses, mother-in-law suites, or secondary dwelling units, ADUs are small living units that usually have their own kitchen, bathroom, and bedroom space located on the same property as traditional single-family homes. Importantly, ADUs can be rented to visitors as short-term rentals to supplement accommodation services. ADUs, recently, are seen as unique spaces that allow visitors to have a more authentic experience in the community they are staying. For trail towns, they can provide additional accommodations relatively quickly with little disruption and can enhance a trail town's character.

### 4.6.5 Policies to address dilapidated buildings

Dilapidated buildings are unsafe, lower property values, and hinder economic development in the towns surrounding them. Yet, these properties also present opportunities for revitalization. Towns in West Virginia have a wealth of tools to address these properties, and organizations like the Land Use and Sustainable Development Law Clinic at the West Virginia University College of Law provide guidance and assistance in navigating dilapidated building issues. One effective tool that should be used by the trail towns is the Land Reuse Agency (LRA). Authorized by the Urban Renewal Authority Law of 1951 and the West Virginia Land Reuse Agency Authorization Act of 2014, LRAs are public bodies that may facilitate the return of vacant, abandoned, or tax-delinquent properties to productive use. An LRA would allow trail towns to purchase targeted dilapidated buildings in commercial centers to create more economic growth and opportunities for their communities

### KAYAK STORAGE: A CASE STUDY

To encourage visitation to small businesses in the City's Downtown area, the City of Morgantown constructed and installed a kayak locker that allows boaters to securely store their boats while visiting the downtown area. The locker below cost ~\$12,000 to install.



Source: Downstream Strategies

## BAKERSVILLE, NC: A CASE STUDY IN DOWNTOWN REVITALIZATION

Bakersville is a small mountain community between Boone and Asheville, North Carolina with an economic history tied to the boom and busts of the mining, agriculture, and manufacturing industries. In the 1990s, Main Street suffered with 40 percent of storefronts vacant. In response to the economic downturn, business owners, artists, and civic leaders organized the Bakersville Improvement Group, or BIG. BIG’s mission was to use arts and culture to improve the central business district.

Shortly after BIG’s inception, the area was hit with a devastating flood that severely limited downtown revitalization efforts. To make matters worse, floodplain maps were redrawn which severely limited development opportunities in Bakersville’s downtown. Rather than relent to the floodplain as a threat to revitalization, the community used it as an opportunity. Revitalization efforts shifted to the creek that ran alongside Main Street. As a result, BIG partnered with others to create a creek walk --- a one-mile paved walkway along the creek. The creek walk has proven to support the growing artist-based downtown economy and attract tourists to Bakersville. It has also ignited tourism for the area as the host of the annual Bakersville’s Rhododendron Festival. (University of North Carolina, 2022)

## 5. IMPLEMENTATION PLAN

Table 17 provides a general framework for implementing the recommendations contemplated in this plan. The Elk River Trails Foundation should serve as the primary driver of these implementation activities. However, support from other stakeholders, particularly representatives of local government and county development authorities, will be vitally important. The Foundation should activate topic area committees to pursue implementation efforts.

Table 18 provides a summary of anticipated implementation costs from 2023-2032.

**Table 17: Implementation plan**

| Topic                | Action item                                     | Responsible team                             | Timeline           | Priority | Staffing                   | Cost                            |
|----------------------|---|--|--------------------|----------|----------------------------|---------------------------------|
| Business development | Implement short-term business development goals | Entrepreneurs, Advantage Valley, ERTF, Towns | 2023-2026          | High     | 1 to 2 full-time employees | \$300,000+ <sup>7</sup>         |
| Business development | Implement long-term business development goals  | Entrepreneurs, Advantage Valley, ERTF, Towns | Ongoing after 2026 | Moderate | 1 full-time employee       | \$100,000 per year <sup>8</sup> |

<sup>7</sup> Includes implementation of the FASTER WV model to provide business outreach, entrepreneurial and start-up support, business coaching, and business growth technical assistance to Trail Town businesses and entrepreneurs. Does not include any other costs expected to be incurred by businesses themselves, such as business licensing, renovation costs, direct purchases, etc.

<sup>8</sup> See Footnote 7.



## Implementation Plan Continued

| Topic                | Action item  | Responsible party   | Timeline  | Priority | Staffing  | Cost   |
|----------------------|--|---|-----------|----------|---|--|
| General support      | Educate the greater community about tourism opportunities                            | ERTF, County Development Authorities, Towns                 | Ongoing   | Moderate | None  | Volunteer time from stakeholders   |
| Business development | Inventory investment ready projects  | ERTF, County Development Authorities                        | Ongoing   | High     | None  | Volunteer time from stakeholders   |
| Infrastructure       | Develop accessible kayak launches in each community                                  | ERTF, Towns   | 2024      | High     | Design consultants/<br>Building Contractors                 | \$400,000 to \$500,000 <sup>9</sup> per launch location in Sutton, Gassaway, and Clay. \$800,000 in Clendenin. |
| Infrastructure       | Establish at least one trail connection in each community                            | ERTF, Towns   | 2024      | High     | Design consultants/<br>contractors                          | \$100,000 per connection in Sutton, Gassaway, and Clay   |
| Infrastructure       | Support and expand existing façade improvement program                               | ERTF, Towns, County Commissions and Development Authorities | 2023-2026 | High     | 1 full-time manager plus design consultants/<br>contractors | \$800,000  |
| General support      | Keep construction dollars within the local economy                                   | Everyone  | Ongoing   | Moderate | None  | None   |
| Infrastructure       | Advocate for infrastructure projects through local planning and development councils | ERTF, Towns, County Commissions, Development Authorities    | Ongoing   | Moderate | Volunteers  | None   |
| Infrastructure       | Develop kayak/boat storage at put-in/take-out locations                              | ERTF, Towns   | 2024      | Moderate | General contractor  | \$15,000 per location  |
| Wayfinding           | Conduct a visual preference survey with a wayfinding committee                       | ERTF  | 2023      | High     | Design consultants  | \$10,000 to \$15,000   |

<sup>9</sup> Does not include potential land acquisition costs.

## Implementation Plan Continued

| Topic      | Action item   | Responsible party | Timeline | Priority | Staffing                                     | Cost  |
|------------|---|-------------------|----------|----------|--|---|
| Wayfinding | Coordinate with the West Virginia Department of Natural Resources to provide a business director and wayfinding at each Elk River Trail trailhead kiosk | ERTF              | 2024     | High     | Sign manufacturer                            | \$9,200 in 2024 and \$9,200 for biennial updates to signs |
| Wayfinding | Provide US National Park style kiosks at the proposed water access areas  | ERTF              | 2024     | High     | Sign manufacturer                            | \$11,500  |
| Marketing  | Expand on initial branding work completed by WVU to define a broad brand concept for the Elk River Trail Towns  | ERTF              | 2023     | High     | Market consultant                            | \$5,000   |
| Marketing  | Update the ERTF website to provide tourism information related to the Elk River Trail Towns and their businesses.                                       | ERTF              | 2023     | High     | Marketing/Website consultant                 | \$10,000 to \$15,000                                      |
| Marketing  | Have high quality video and photos taken of each of the Trail Towns   | ERTF              | 2024     | High     | Marketing consultant                         | \$6,000 to \$10,000                                       |
| Marketing  | Develop a tagline that captures the Elk River Trails brand  | ERTF              | 2023     | Moderate | Marketing consultant                         | \$1,000   |
| Marketing  | Establish a social media presence   | ERTF              | 2023     | High     | 1 part-time employee or marketing consultant | \$10,000 per year   |

## Implementation Plan Continued

| Topic     | Action item   | Responsible party  | Timeline    | Priority | Staffing                                   | Cost  |
|-----------|---|--|-------------|----------|--|---|
| Marketing | Develop paper maps that orient visitors to the trails, downtown businesses, services, and other points of interest. | ERTF   | 2024 and on | Moderate | Marketing consultant                       | \$5,000 for content development and \$5,000 per 10,000 copies |
| Marketing | Promote the Elk River Trails System through a targeted billboard campaign   | ERTF   | Ongoing     | High     | Outdoor advertising companies              | \$750 to \$12,000 per month per location                      |
| Funding   | Track grant opportunities to advance tourism in the Trail Towns   | ERTF   | Ongoing     | High     | Grant writing consultant or volunteer time | \$500 to \$1,000 per month for a consultant                   |
| Funding   | Pursue grants   | ERTF, Towns, County Development Authorities, Entrepreneurs | Ongoing     | High     | Grant writing consultant                   | \$500 to \$20,000 per grant opportunity                       |
| Policies  | Establish equine urine and manure cleanup requirements  | ERTF, Towns  | 2023        | Low      | None                                       | None  |
| Policies  | Pass other horse-friendly policies  | ERTF, Towns  | 2023        | Low      | None                                       | None  |
| Policies  | Promote accessory dwelling units for short-term rentals   | ERTF, Towns  | 2023        | Low      | None                                       | None  |
| Policies  | Engage the WVU Law Clinic to determine the best policy approach to addressing dilapidated buildings                 | ERTF, Towns  | 2023        | Moderate | None                                       | None  |

**Table 18: Implementation funding need**

| Year                 | Business development | Infrastructure     | Marketing        | Funding support  | Wayfinding      | Total need         |
|----------------------|----------------------|--------------------|------------------|------------------|-----------------|--------------------|
| 2023                 | \$100,000            | \$266,666          | \$43,500         | \$24,000         | \$12,500        | <b>\$446,666</b>   |
| 2024                 | \$100,000            | \$2,776,666        | \$28,000         | \$24,000         | \$20,700        | <b>\$2,949,366</b> |
| 2025                 | \$100,000            | \$266,666          | \$22,000         | \$24,000         |                 | <b>\$412,666</b>   |
| 2026                 | \$100,000            |                    | \$24,000         | \$24,000         | \$9,200         | <b>\$157,200</b>   |
| 2027                 | \$100,000            |                    | \$26,000         | \$24,000         |                 | <b>\$150,000</b>   |
| 2028                 | \$100,000            |                    | \$28,000         | \$24,000         | \$9,200         | <b>\$161,200</b>   |
| 2029                 | \$100,000            |                    | \$30,000         | \$24,000         |                 | <b>\$154,000</b>   |
| 2030                 | \$100,000            |                    | \$30,000         | \$24,000         | \$9,200         | <b>\$163,200</b>   |
| 2031                 | \$100,000            |                    | \$30,000         | \$24,000         |                 | <b>\$154,000</b>   |
| 2032                 | \$100,000            |                    | \$30,000         | \$24,000         | \$9,200         | <b>\$163,200</b>   |
| <b>10-Year Total</b> | <b>\$1,000,000</b>   | <b>\$3,309,998</b> | <b>\$291,500</b> | <b>\$240,000</b> | <b>\$70,000</b> | <b>\$4,911,498</b> |

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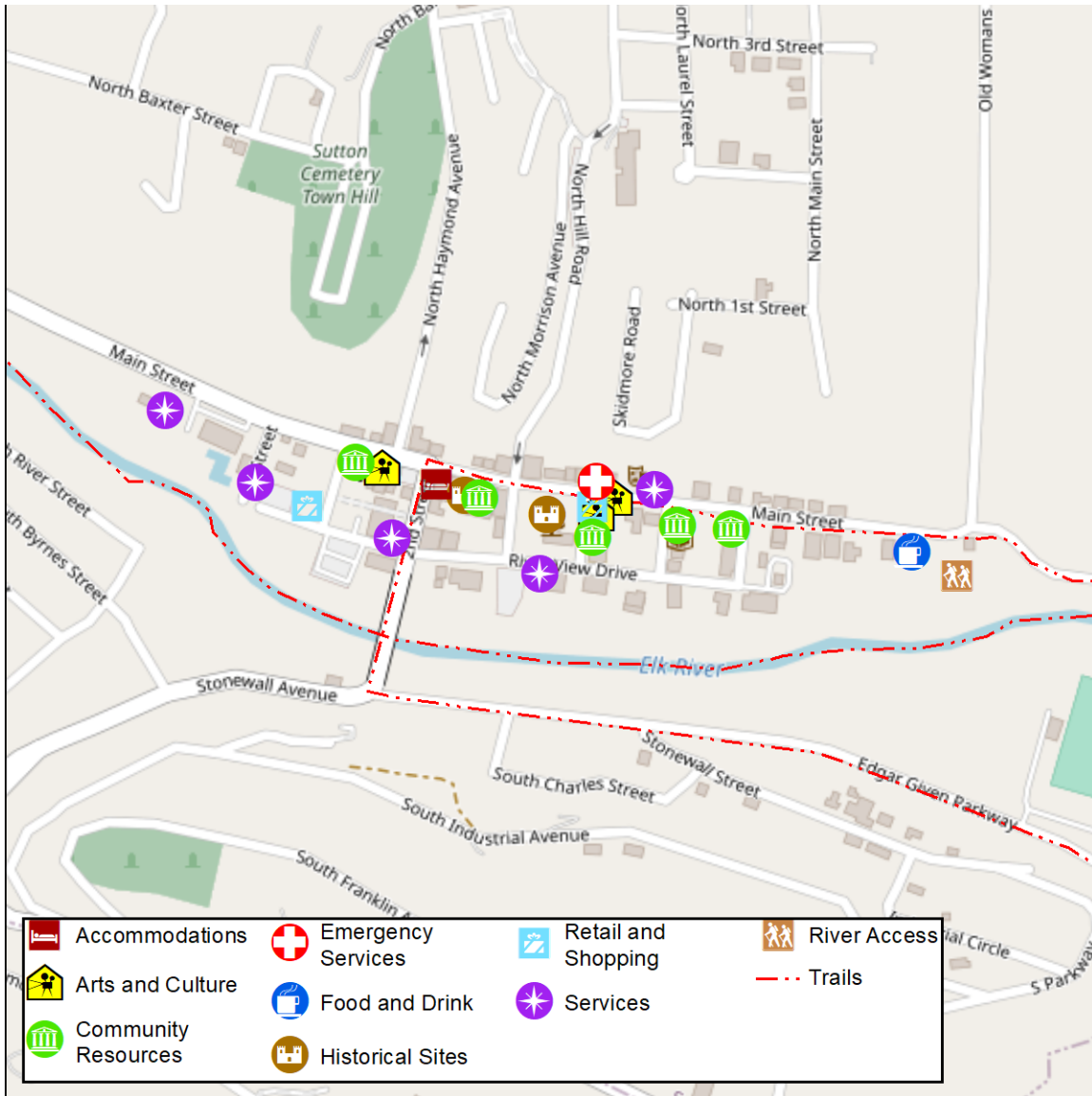
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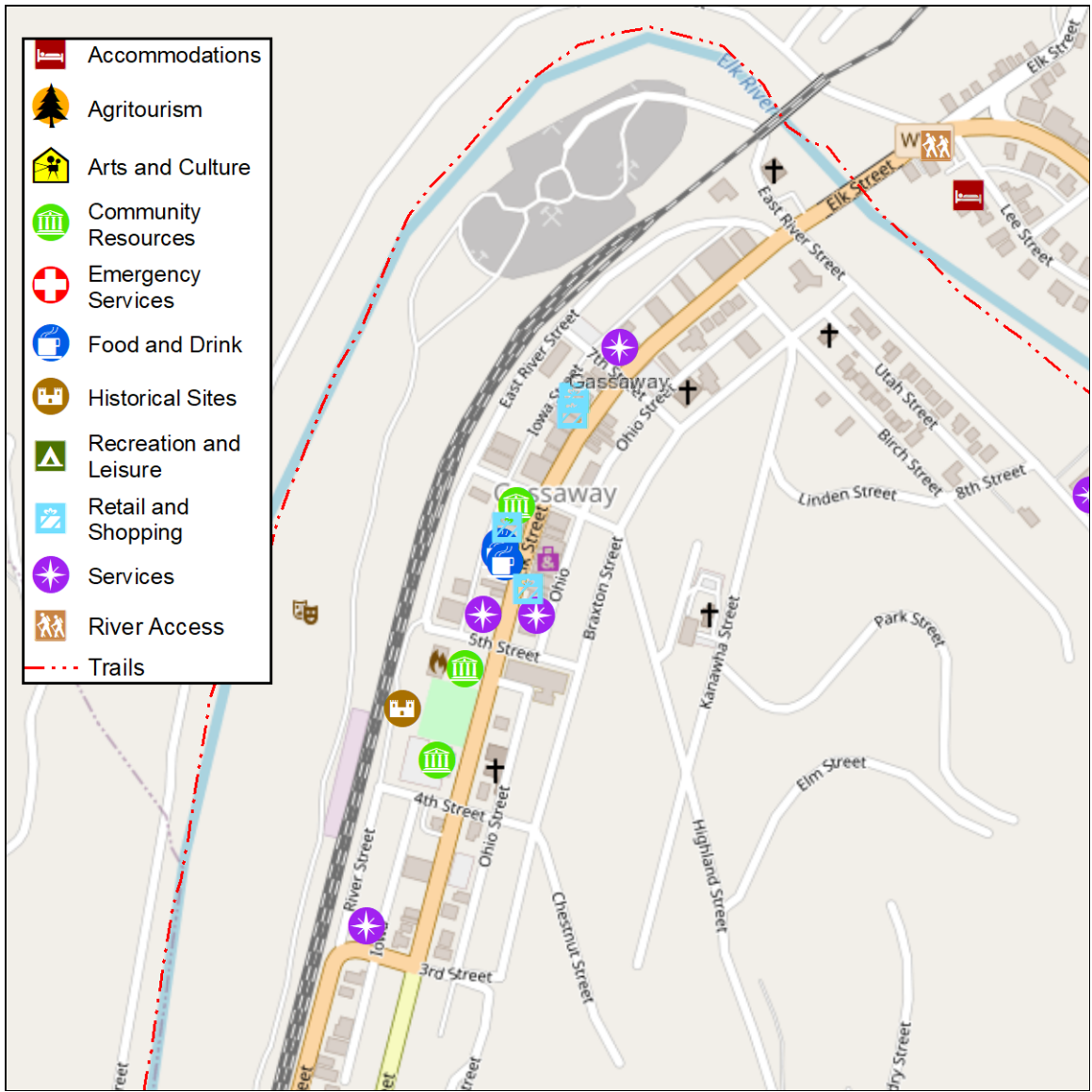
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# APPENDIX A: ASSET MAPS

## Sutton

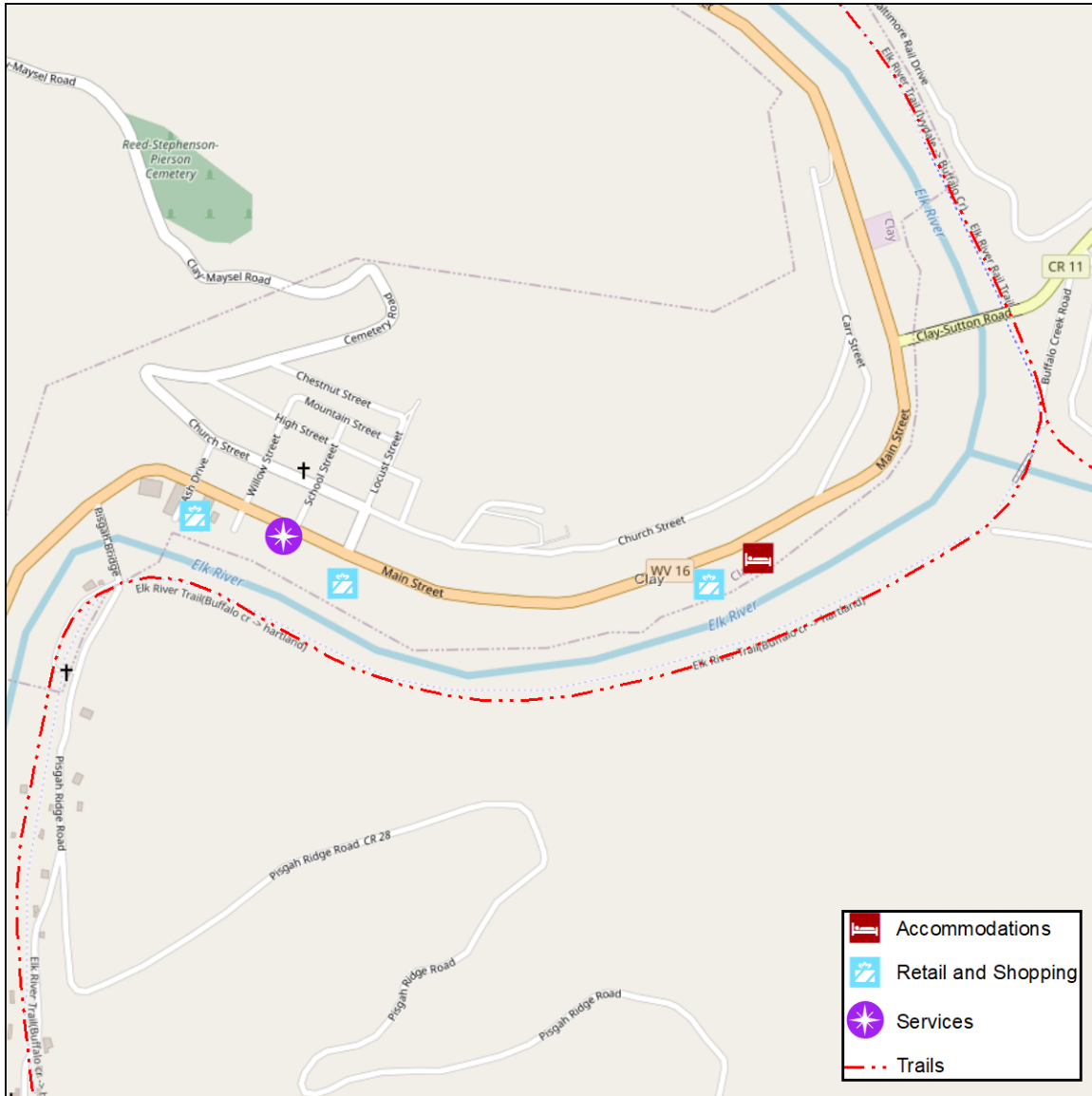


# Gassaway





# Clay



# Clendenin



## APPENDIX B: IMPACTS OF SHORT-TERM BUSINESS DEVELOPMENT

The first wave of economic impacts will come from the buildout of the businesses and general infrastructure improvements listed in Table 6. Utilizing the IMPLAN model for West Virginia, we estimate the construction activity associated with the business construction/renovation would result in nearly \$19 million in regional economic activity. This activity would support 115 full- and part-time jobs, primarily in the construction trades. The team estimates 68 direct on-site jobs associated with immediate construction activity will provide over \$4.1 million in labor income to local residents, while the total regional effect on labor income is nearly \$6.4 million. Direct, secondary, indirect, and induced impacts from construction activity are summarized in Table 7.

**Table 19: Construction/renovation impacts**

| Impact type     | Employment | Labor income | Value added | Output       |
|-----------------|------------|--------------|-------------|--------------|
| Direct effect   | 68         | \$4,133,959  | \$5,490,855 | \$11,683,982 |
| Indirect effect | 22.3       | \$1,075,860  | \$1,919,503 | \$3,643,619  |
| Induced effect  | 25.4       | \$1,140,861  | \$2,038,476 | \$3,639,299  |
| Total effect    | 115.6      | \$6,350,677  | \$9,448,832 | \$18,966,901 |

The ongoing activity at new businesses listed in Table 11 will result in over 242 new jobs in the regional economy, more than \$20 million in annual sales activity and an increase in Value Added of nearly \$11 million. Over \$7 million of this increase in Value Added is estimated to come from increases in labor income with \$5.7 million resulting from the direct activity.

**Table 20: Ongoing impacts**

| Impact type     | Employment | Labor income | Value Added  | Output       |
|-----------------|------------|--------------|--------------|--------------|
| Direct effect   | 193        | \$4,736,484  | \$6,938,369  | \$12,489,779 |
| Indirect effect | 21         | \$1,075,592  | \$1,731,724  | \$3,531,505  |
| Induced effect  | 28.4       | \$1,267,616  | \$2,265,371  | \$4,044,331  |
| Total effect    | 242.5      | \$7,079,692  | \$10,935,461 | \$20,065,614 |

## APPENDIX C: WATER ACCESS IN THE TRAIL TOWNS

Downstream Strategies recommends pursuing the development of four accessible kayak launches along the Elk River Water Trail, one within easy access to each of the trail towns' central business district. Eventually, these launches should all follow the same general design guidelines and include parking (5-10 dedicated spaces), wayfinding signage to businesses and other attractions in town, secure kayak storage lockers, and an EZ Dock kayak launch system. It may also become necessary to add low maintenance pit latrines or flushable toilets at each location.

Additionally, as discussed on Page 30 and 31, each town should establish at least one dedicated connector between the Water and Rail Trail and their central business districts. These trail connections should follow the same general design guidelines and include sidewalks wide enough to facilitate a bidirectional flow of pedestrian traffic, low maintenance landscaping, and directional signage.

### Gassaway

There are currently no signed kayak launch points in Gassaway. Currently, the Elk River Water Trail is most easily accessed from downtown Gassaway by driving to access points a few minutes up or downstream. There is a potential launch location on the northside of town is property owned by the West Virginia Department of Highways (WVDOH) near the intersection of S. State and N. Elk Streets. This property already used by some local kayakers to access the Elk River and is slated to be improved by the WVDOH following an upcoming replacement of the Elk Street Bridge.



(Above) The redevelopment of property owned by the WV Department of Highways would facilitate improved river access in the downtown area of Gassaway.

Trail connector discussed on Pages 30 and 31.

## Sutton

The Elk River Water Trail in Sutton is primarily accessed from just below the dam on the south bank of the river, on Army Corps of Engineers property, or on the north bank of the river near the Elk River Hotel and Café. It can also be accessed on the northwest side of the 2nd Street Bridge near the Sutton Farmers Market in the center of town; however, this launch could be greatly improved. Unused space adjacent to the Farmer's Market owned by Aaron James (with an easement from the Sutton VFD) could be repurposed to host a water trailhead and serve as the gateway to Sutton from the river. Commercial space in the lower level of Aaron James' building could complement this launch area by hosting a riverside café or similar business that caters to river users (Photo simulation shown on next page). The beautification of this area will also complement the Farmers' Market, which operates seasonally on Saturdays from 8am to 12pm.



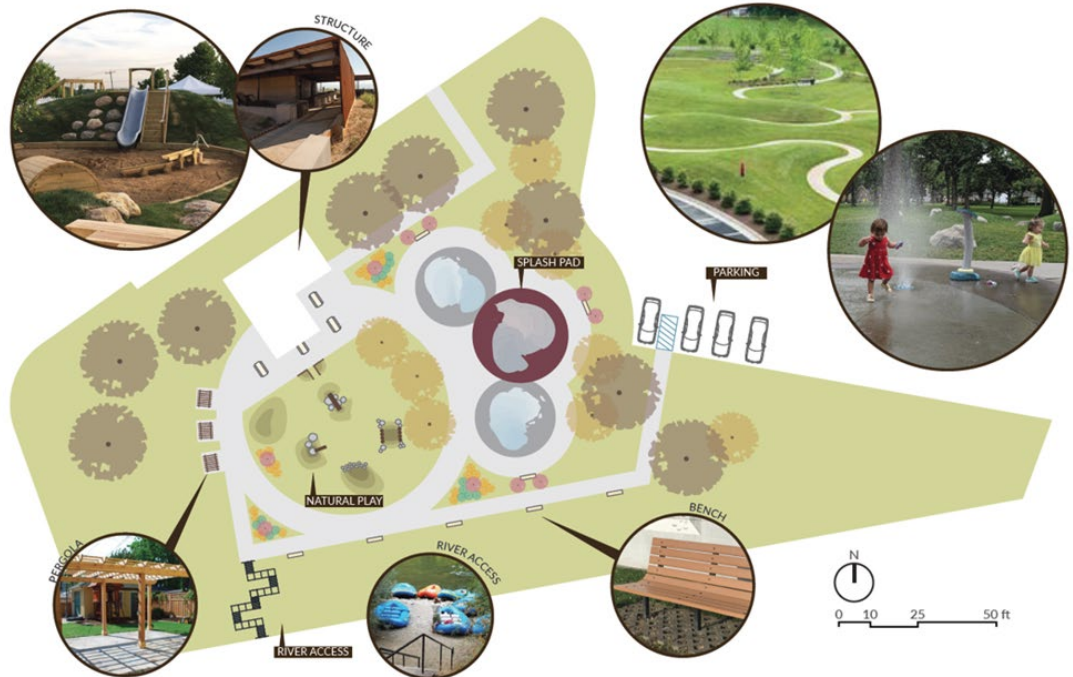
(Above) The development of a river access point on the Aaron James property provides an ideal entry point to Historic Downtown Sutton. It creates opportunities for the adaptive reuse of existing vacant commercial space along 2<sup>nd</sup> Street and River View Drive, while also facilitating key connections and easy access to potential future developments on property currently owned by Sutton Christ United Methodist Church (identified as BCDA focus area in the drawing). It is worth noting that the Brady Mickey property at the dead end of River View Drive is similarly positioned to host a water access location and should be considered as a potentially viable alternative.



(Above) The adaptive reuse of the Aaron James property provides for easy access to the water, while also opening opportunity for new business. The outdoor patio area provides a place for visitors to relax and enjoy local fare but could also be used to expand the number of vendors on Farmers Market Saturdays. (Left) The property is currently used for Farmers Market bathrooms.

## Clay

The Elk River Water Trail in Clay is currently accessed behind the Clay County Circuit Court. In the Upper 2 portion of Clay, the Water Trail is primarily accessed behind a property owned by the Clay County Business Development Authority (and managed by the WVDNR and Clay CVB) on Center Street. The river is also accessed through several unofficial launches, including one on property owned by the Clay VFD at the Elk Street Bridge on the west side of town. Working with WVU Extension and the Center for Active West Virginia, the community has developed plans to improve this area with a splash pad, community gardens, natural play area, benches for residents and visitors to take in the scenery, and improved river access (Concept shown at above).

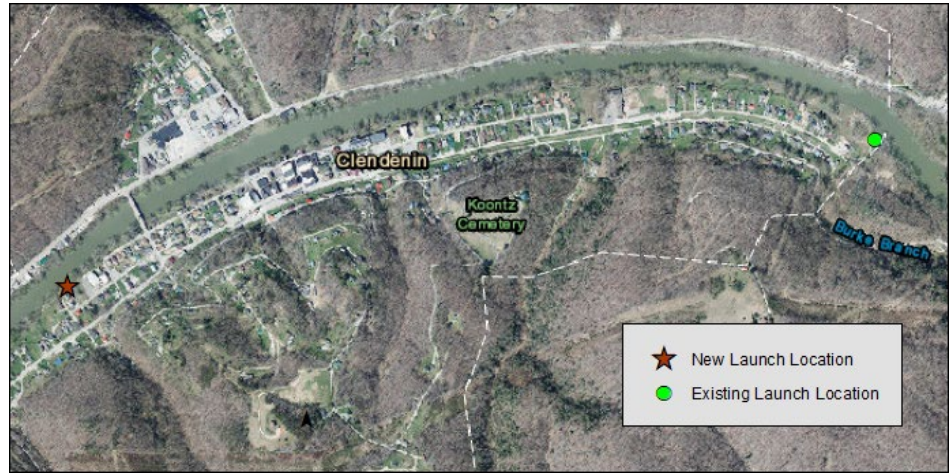


While this improved property (above) will serve as a great gateway into the Town of Clay for visitors to the Elk River Water Trail. Additional property owned by the Town across the Elk Street Bridge could also serve as an ideal water access point and provide more direct access to the rail trail. Further, an existing sidewalk on the Bridge could serve as a connector between the trails and the downtown area without need for much improvement. (Concept shown at above)



## Clendenin

Like the other towns, the Elk River Water Trail is primarily accessed from a number of unsigned access points on private property in Clendenin. However, the Town of Clendenin recently developed Water Trail access at the end of Maywood Avenue on the east side of town. The Town owns a similarly sized property on the west side of town at the intersection of Walnut Street and Virginia Avenue is working to secure \$800,000 in support to develop the property into an improved water access point.



(Below) E.L. Robinson designed a trailhead in downtown Clendenin along Maywood Avenue. The location of this trailhead provides direct access to the downtown area along existing sidewalks.



Source: E.L. Robinson's Town of Clendenin Trail Town Planning Feasibility Study



## APPENDIX D: BUSINESS STARTUP SCENARIOS

What would it take to actually start a tourism-sector business in the Elk River Trail Towns? The following scenarios explore startup costs and logistics for several of the key business opportunities identified in Chapter 4), including:

- A kayak rental facility in Sutton,
- an RV campground in Gassaway,
- a glamping business in Clay,
- and a restaurant/café in Clendenin.

These scenarios represent very modest startups. Significantly more could easily be spent on these business concepts. However, the goal with these scenarios is to show that an entrepreneur with a little grit, determination, and community buy-in could launch a tourism-sector business on a lean budget.

*Disclaimer: The following hypothetical scenarios present projections that are based on estimates and assumptions and are informed by the best available data at the time this document was prepared. Proprietors are advised to confirm any figures listed in this report before making any financial commitments.*

### OUTDOOR RETAILER/KAYAK RENTAL FACILITY

There are several locations in Sutton that could host an outdoor retailer and kayak rental facility; however, buildings located near the launch location contemplated in Appendix C may be at a competitive advantage to host such a business, given their proximity to the river and a steady stream of recreators. The Braxton County Development Authority focus area identified in the Sutton launch location map is a vacant lot is likely to play host to new construction in the downtown area. Given how the property is laid out, the lower level of any new building on the site will only be accessible via River View Drive at the rear of the building; however, signage could be placed at the front of the building directing passersby from Main Street to any new business. This lower-level space could be purpose-built to host a small outdoor retailer and kayak rental facility.

#### Estimated startup costs and financing

Moving into a purpose-built space will only require an entrepreneur to provide inventory for the retail shop and rental facility. Initial inventory for a small outdoor retailer is anticipated to be around \$100,000. The purchase of single and tandem kayaks, canoes, and stand-up paddle boards for the rental side of the business will cost \$52,000 for an inventory of 50 boats. Total inventory costs for this business total \$152,000.

#### BUSINESS LOAN SCENARIO

- **15% down payment: \$22,800**
- **Total borrowed: \$129,200**
- **Payments of ~\$2,500 per month**

**\*Assuming a 5-year fixed terms at 6% interest**

## Operating costs

The proprietor should expect to incur the following categories of operating expenses:

- **Loan payments:** Assuming the proprietor secures a loan with similar terms shown above, monthly loan payments would likely total \$30,000 per year.
- **Utilities:** The space might see utilities of \$500 per month, totaling \$6,000 per year.
- **Payroll:** Assuming the business opens with four part-time equivalent employees at minimum wage, payroll would total around \$48,000 per year.
- **Taxes:** The business will need to pay sales tax and business and occupation (B&O) tax on both the retail and rentals. Depending on the business structure, income tax for the business will likely be routed to the owners' personal tax return.
- **Inventory:** The retail business inventory will need to be replaced as items are sold. The proprietor can reasonably expect to spend \$75,000 per year on inventory replacement. Boats in the rental fleet may need replaced every 3-5 years.
- **Other:** The proprietor should plan on spending around \$30,000 per year on insurance, a point-of-sale system, website, advertising, maintenance, and other miscellaneous expenses.

## Revenue

With a total inventory of \$100,000, an outdoor retailer can expect to bring in \$200,000 in gross annual sales. Assuming that tandem kayaks; canoes; and stand-up paddle boards are rented at \$25 per day; and single kayaks are rented at a rate of \$20 per day, the 50-boat inventory could conservatively bring in \$30,000 between Memorial Day and Labor Day. Between the retail and rentals, proprietors can expect an annual gross income of \$230,000.

| Pro forma income statement                 |                  |
|--|------------------|
| <b>Estimated annual operating expenses</b> |                  |
| Annual loan payments                       | \$30,000         |
| Utilities                                  | \$6,000          |
| Payroll                                    | \$48,000         |
| Inventory replacement                      | \$75,000         |
| Other/misc. costs                          | \$30,000         |
| <b>Total operating expenses</b>            | <b>\$189,900</b> |
|  |                  |
| <b>Projected gross revenue</b>             | <b>\$230,000</b> |
|  |                  |
| <b>Net annual income</b>                   | <b>\$40,100</b>  |

## RV CAMPGROUND

The Kenton Meadows Company owns a 42-acre property that runs the full length of River Street from its intersection with Elk Street on the northside of Gassaway to its intersection with Perry Street on the southside. The property has long been utilized as a community asset, notably hosting Gassaway Days every June. Given its adjacency to the downtown area, Elk River Rail Trail, and the Elk River Water Trail, a portion of the property would ideally be put to use as an RV campground with equestrian accommodations.

### Estimated startup costs and financing

Based on the size of the property, full-scale development could accommodate literally hundreds of hookup sites with room leftover for equestrian accommodations; however, this scenario examines initial development of 50 campsites with full hookups for electric, water, and sewer and additional equestrian accommodations on the southernmost ~15 acres of the property.

Once property is secured, either through sale or lease, it will need basic capital improvements to be developed as a campground, including, at a minimum, full hookups for water, sewer, and electricity (with options for 30- and 50-amp service). Utilities are currently extended to the perimeter of the property and will need to be extended within the site.

The proprietor should plan to invest around \$9,000 per site—roughly half spent on the necessary hookups, and half spent on concrete for the site pad and additional on-site amenities and improvements—totaling roughly \$450,000 for 50 sites. While this is slightly less than the national average development cost per RV campground (\$10,000 per site), it would likely be more than adequate given that the site is flat and has easy access to municipal utilities (Niche Investment Network LLC, 2014). To establish equestrian accommodations, the proprietor should budget an additional \$75,000 for the purchase of a prefabricated horse barn and installation of fencing.

Based on these initial development assumptions, an initial investment of approximately \$525,000 (not including real estate acquisition costs) is needed to open the campground, which falls within the scope of 7a Small Business Loans from the Small Business Administration.

#### BUSINESS LOAN SCENARIO

- **15% down payment: \$78,750**
- **Total borrowed: \$446,250**
- **Payments of ~\$3,200 per month**

**\*Assuming a 20-year fixed terms at 6% interest**

### Operating costs

The proprietor should expect to incur the following categories of operating expenses:

- **Loan payments:** Assuming the proprietor secures a loan with similar terms described above, monthly loan payments would likely total \$38,400 per year.
- **Utilities:** Based on estimates for RV energy and water consumption, the campground could likely see total utility costs (including electricity, water, sewer, and wireless internet) of around \$10,000, though actual costs will vary based on actual consumption and local rates. The campground may also consider adding gas hookups at additional cost.

- **Payroll:** More than 70% of RV parks have less than 5 employees, who incur average payroll costs of \$30,000 each. Assuming the Gassaway campground starts with two employees, payroll costs would likely total \$60,000 per year.
- **Insurance:** A small RV campground could expect insurance premiums of \$70–80 per month for a standard general liability policy.
- **Taxes:** Assuming the business is incorporated as a limited liability corporation (LLC) with a single owner, the business could expect annual federal and state taxes of around \$61,000.
- **Other:** The proprietor should expect to spend around \$100,000 on other necessary items including maintenance, landscaping, marketing, and accounting.

| <b>Pro forma income statement</b>          |                  |
|--|------------------|
| <b>Estimated annual operating expenses</b> |                  |
| Annual loan payments                       | \$38,400         |
| Utilities                                  | \$10,000         |
| Payroll                                    | \$60,000         |
| Insurance                                  | \$900            |
| Taxes                                      | \$61,000         |
| Other/misc. costs                          | \$100,000        |
| <b>Total operating expenses</b>            | <b>\$270,300</b> |
| <b>Projected gross revenue</b>             | <b>\$400,000</b> |
| <b>Net annual income</b>                   | <b>\$129,700</b> |

## Business performance

Assuming total (gross) RV site income of approximately \$400,000 and total operating expenses of \$270,300, the projected profit (net income) for the RV campground business would be just under \$130,000 per year.

## GLAMPING SITE

The Elk River Trail Foundation owns a 2.8-acre parcel across the Elk River from Clay corporate limits that is adjacent to the Elk River Trail. The property sits at the confluence of the Elk River and Buffalo Creek near the Triplett Ridge Road bridge that connects to Main Street. Currently, the property provides parking for trail visitors. Due to the property's proximity to downtown Clay and the Elk River Rail and Water Trails, the property could provide additional lodging for visitors and horse accommodations for equestrian users. The existing 1,200 square foot single-family home that sits on the property would be cost prohibitive to renovate. To accommodate a glamping business, the building should be razed and replaced with a 600 square foot pole barn and eight camp sites.



### Estimated startup costs and financing

Demolition of the existing structure is expected to cost \$4,000. Preparation of the land and construction of a pole barn to accommodate equestrian riders would cost \$17,000.

Glamping tents run approximately \$1,000 per tent. Additional costs include about \$600 per site for bedding and other furnishing, and between \$2,000 and \$5,000 per site for construction of a wooden platform and deck.

A separate bath house should be provided to visitors and operators should expect to spend about \$15,000 on that.

Based on these initial development assumptions, an initial investment of approximately \$89,000 (not including real estate acquisition/leasing costs) is needed to open the glamping site.

#### BUSINESS LOAN SCENARIO

- **15% down payment: \$13,350**
- **Total borrowed: \$75,650**
- **Payments of ~\$840 per month**

**\*Assuming a 10-year fixed terms at 6% interest**

### Operating costs

The proprietor should expect to incur the following categories of operating expenses:

- **Loan payments:** Assuming the proprietor secures a loan with similar terms described above, monthly loan payments would likely total \$10,000 per year.
- **Utilities:** Based on estimates for short term rental energy and water consumption, the property can expect yearly utility costs (including electricity, water, and wireless internet) of around \$5,000, though actual costs will vary based on actual consumption and local rates.
- **Payroll:** Payroll costs for maintaining the glamping business will be minimal. The proprietor should budget \$15,000 per year for part-time help on the property.
- **Insurance:** The property can expect to pay at least \$1,000 a year in flood insurance, \$2,500 a year for commercial liability insurance
- **Taxes:** Assuming the business is incorporated as a limited liability corporation (LLC) with a single owner, the business could expect annual federal and state taxes of around \$27,000.

## Revenue

Based on market research and consultation with other operators in the area, glamping tent rates can be set at \$75 a night. And assuming each tent is occupied three nights a week, glamping tent revenues can expect over \$86,400 a year. Additionally, average horse boarding rates average about \$25 per horse. If visitors provide their own feed and supplies and thirty horses are boarded (at different times) a month, business operators can expect the barn to bring in \$9,000 a year. Between the glamping rentals and horse boarding, proprietors can expect an annual gross income of \$95,400.

## Business performance

With a total (gross) business income of about \$95,400 and total operating expenses of \$60,500, net income for the business is expected to be nearly \$35,000 per year.

| Pro forma income statement                 |                 |
|--|-----------------|
| <b>Estimated annual operating expenses</b> |                 |
| Annual loan payments                       | \$10,000        |
| Utilities                                  | \$5,000         |
| Payroll                                    | \$15,000        |
| Insurance                                  | \$3,500         |
| Taxes                                      | \$27,000        |
| <b>Total operating expenses</b>            | <b>\$60,500</b> |
| <b>Projected gross revenue</b>             | <b>\$95,400</b> |
| <b>Net annual income</b>                   | <b>\$34,900</b> |

## RESTAURANT/CAFÉ

As established in Chapter 4, Clendenin and the rest of the Elk River Trail Towns need additional restaurants and cafes to serve the coming wave of tourists. While there are several buildings in each town that could host such a business, few are as well positioned as 1 Main Street in Clendenin. The building, which formerly hosted a karate studio, is right across the street from Clendenin Brewing Company and adjacent to the town's new downtown stage. It is the perfect location for a small, niche café—a place to grab a specialty coffee or a bite to eat and soak in the smalltown atmosphere.

### Estimated startup costs

The single biggest line item for a restaurant to start in an existing building that was not previously used as a restaurant is the remodel of the space and the outfitting of a commercial kitchen. Based on the previous use of the building, renovations to accommodate a restaurant could reasonably be \$100,000 or more.

#### BUSINESS LOAN SCENARIO

- **15% down payment: \$16,650**
- **Total borrowed: \$94,350**
- **Payments of ~\$800 per month**

**\*Assuming a 15-year fixed terms at 6% interest**

Factor in another \$1,000 for necessary licenses and an initial food/beverage inventory of \$10,000, and this business would be ready to start for \$111,000, excluding real estate acquisition costs.

## Revenue

The average West Virginia restaurant pulls in \$935 in sales per day, which translates into annual sales of over \$341,000 per year (Womply, 2020). Assuming the new restaurant/café starts with counter service only (where customers order and pick up food at the counter, rather than having wait staff deliver food to tables), a conservative estimate for total annual sales would be \$300,000 per year—slightly less than the state average. To hit that sales level, the restaurant would need to serve about 100 customers per day with \$10 in sales per customer.

## Operating costs

The proprietor should expect to incur the following categories of operating expenses:

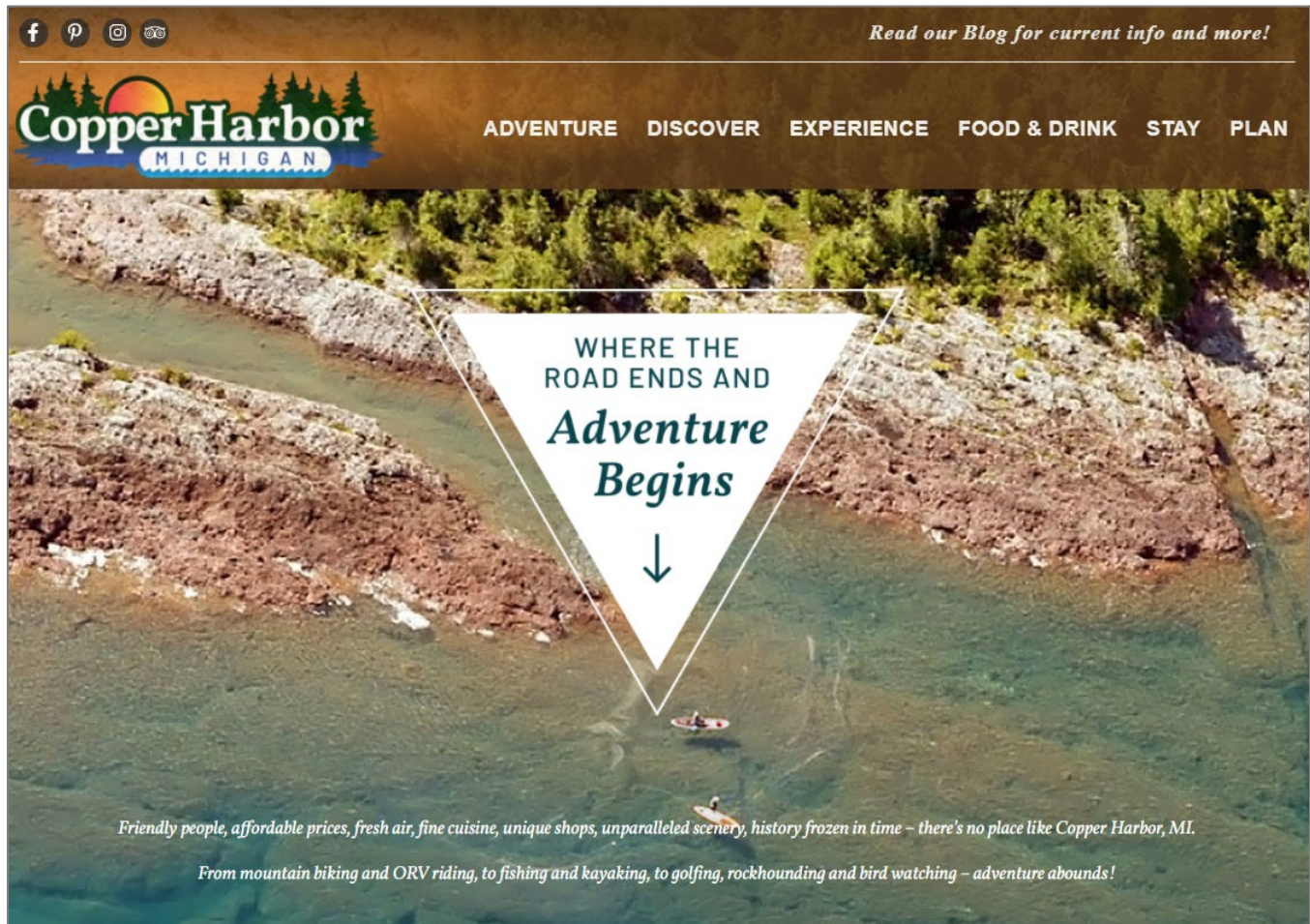
- **Loan payments:** Assuming the proprietor secures a loan with similar terms described above, monthly loan payments would likely total \$9,600 per year.
- **Utilities:** The space might see utilities of \$500 per month, totaling \$6,000 per year.
- **Payroll:** Assuming the restaurant opens with five employees at minimum wage, payroll would total around \$120,000 per year.
- **Inventory:** Restaurants typically spend a third of their total revenue on food and beverage inventory. For this startup, inventory for the first year could total \$100,000.
- **Taxes:** The business will need to pay sales tax and business and occupation tax. Depending on the business structure, income tax for the business will likely be routed through the owners' personal tax return.
- **Other:** The proprietor should plan on spending a minimum of \$30,000 per year on insurance, a website, advertising, maintenance, and other miscellaneous expenses—additional investment in this area would be key to driving more traffic to the business.

| Pro forma income statement                 |                  |
|--|------------------|
| <b>Estimated annual operating expenses</b> |                  |
| Annual loan payments                       | \$9,600          |
| Utilities                                  | \$6,000          |
| Payroll                                    | \$120,000        |
| Inventory                                  | \$100,000        |
| Other/misc. costs                          | \$30,000         |
| <b>Total operating expenses</b>            | <b>\$265,600</b> |
| <b>Projected gross revenue</b>             | <b>\$300,000</b> |
| <b>Net annual income</b>                   | <b>\$34,400</b>  |

## APPENDIX E: BRAND AND WEBSITE EXAMPLES

The Elk River Trail Towns should have a brand and website that showcase an outdoor recreation theme while providing easy access to available lodging, dining, points of interest, and local recreation opportunities. The following websites are examples from similar trail towns.

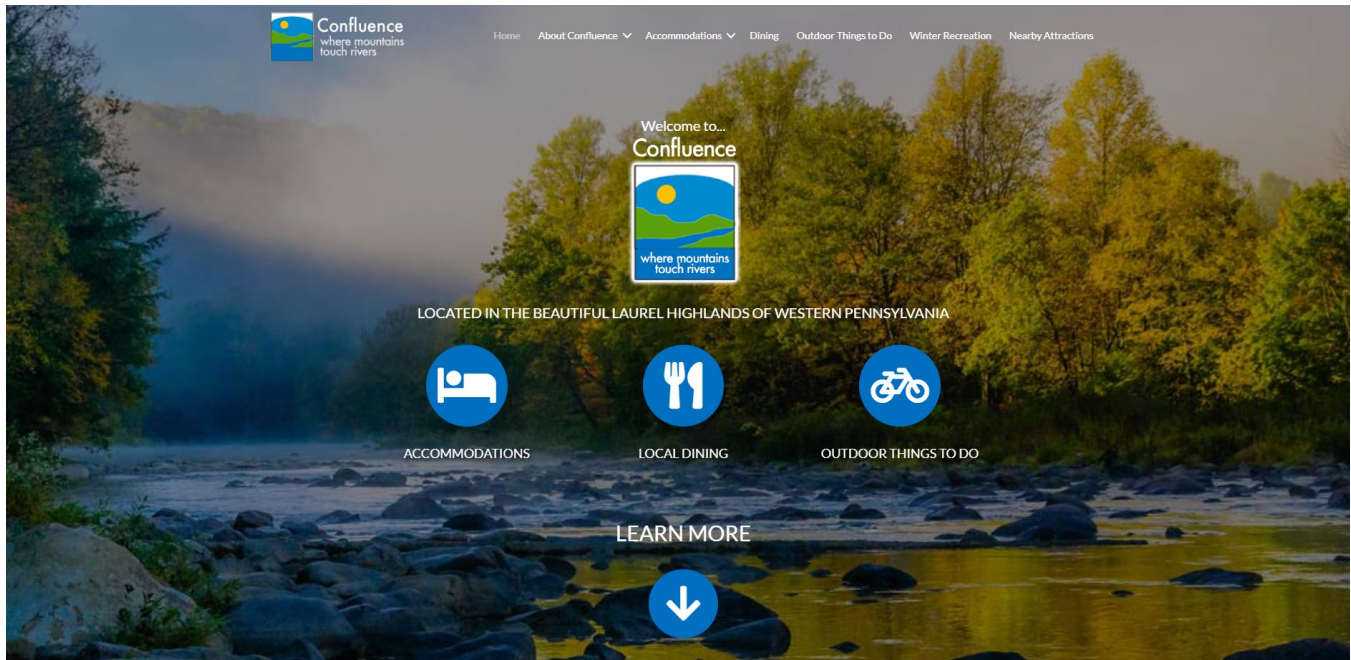
Copper Harbor, Michigan (<https://www.copperharbor.org/>)



**Highlights:** The logo features a nature theme; the website incorporates a social media presence; and the homepage focuses on recreational opportunities, food and drink options, and lodging. The site also offers a planning service. Adventure travel is featured front and center which is an important component in capturing outdoor enthusiasts.



## Confluence, Pennsylvania (<https://www.visitconfluence.info/>)



**Highlights:** The logo features a nature theme and nature-based tagline; the homepage focuses on recreational opportunities, local dining, and accommodations. The site provides a winter recreation page to attract visitors during all four seasons. The site also provides links to businesses and attractions in nearby communities.

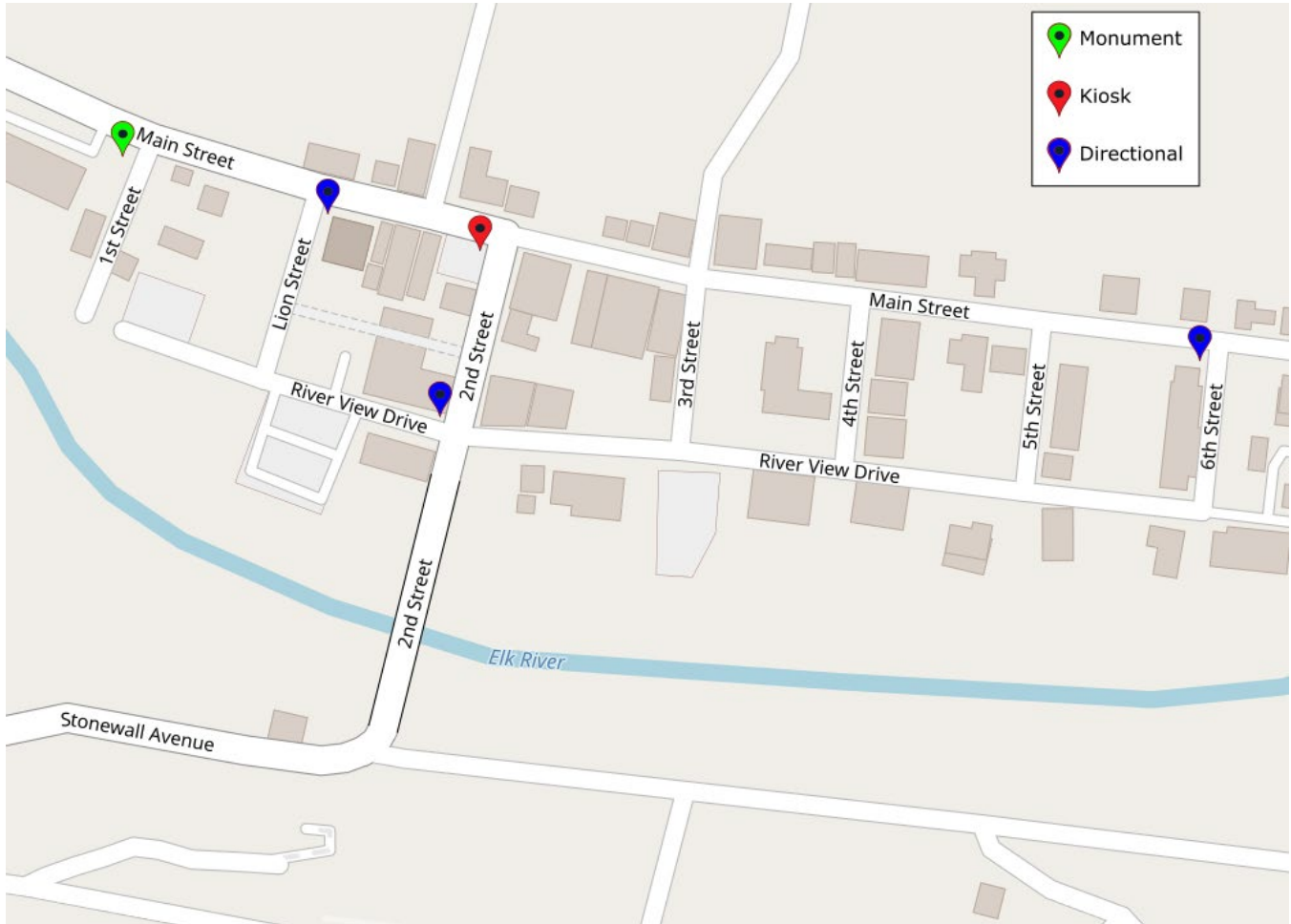
Moab, Utah (<https://www.discovermoab.com/>)



**Highlights:** This site puts the area’s impressive landscape front and center with navigation to explore what the town offers to visitors, including information on attractions, lodging, and activities. Social media is also highlighted on the homepage.

# APPENDIX F: WAYFINDING LOCATIONS

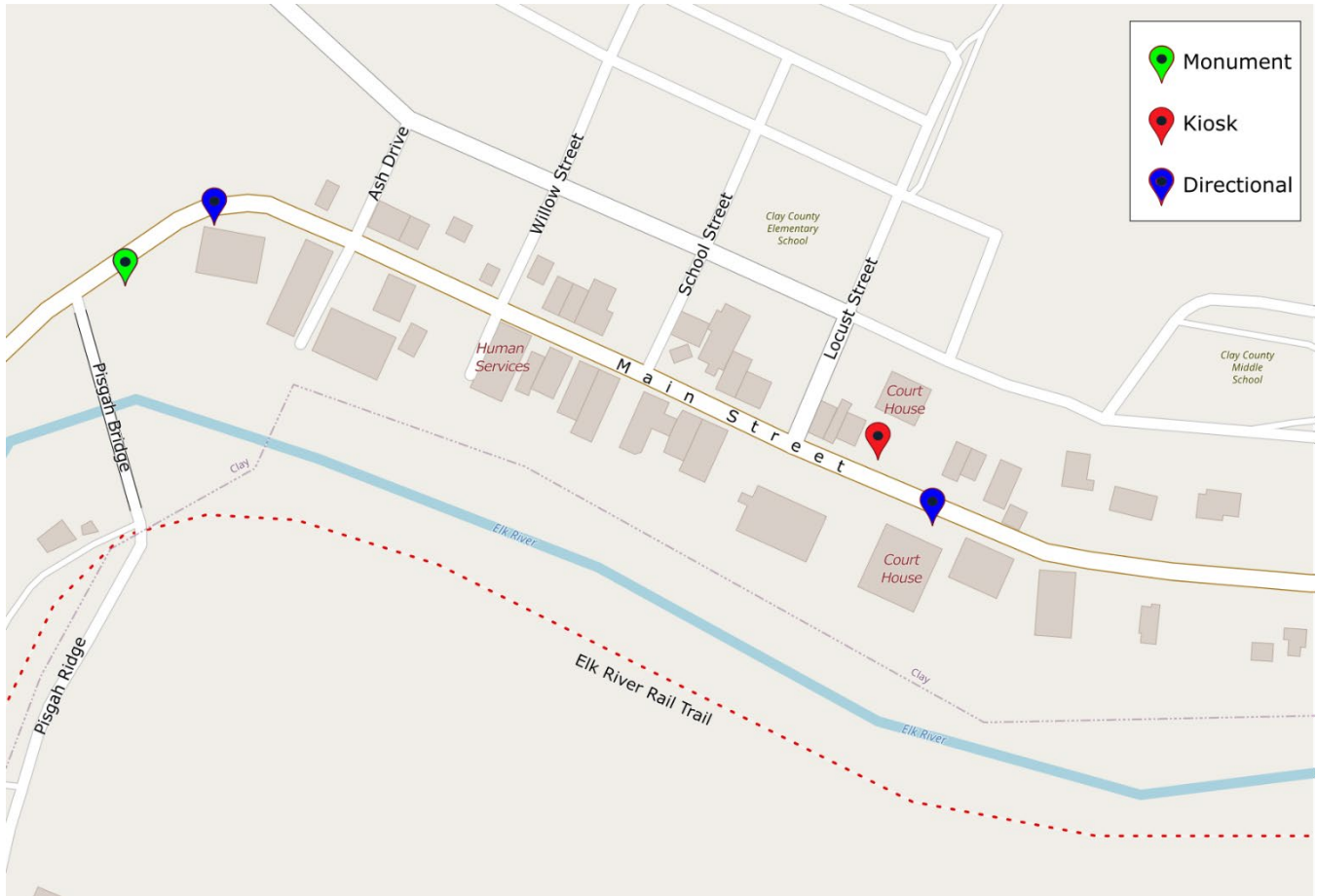
## Sutton



# Gassaway



# Clay



# Clendenin



