

*A Vision & Economic Development  
Strategic Plan  
for  
West Burke Village*

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FAIRWEATHER  
CONSULTING



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## I. Introduction & Summary of Findings

The Village of West Burke is in the midst of a sustained effort to regain its historical role as a vibrant, welcoming center of the community. The One Burke organization has spearheaded this work, leading the community through a planning effort to create public sewer and water infrastructure in the Village and create a vision for a revitalized Village.

The West Burke Visioning and Economic Development Strategy has been undertaken as an outgrowth of this effort. It identifies potential uses to be incorporated in a revitalized Village, establishes a vision for West Burke's future and lays out steps to implement that vision.

This project was begun in the midst of the 2020 Covid-19 pandemic. In addition to the tragic impact it had on human lives and communities, Covid had a dramatic impact on the economy throughout the world, including rural areas such as Vermont. Tourism and hospitality were hit hard. Travel to Vermont was dramatically curtailed for most of 2020. Major destinations were either closed or could only operate at reduced capacity. At the same time, people responded to the pandemic by moving out of major metro areas to rural locations, often taking advantage of the possibility to work remotely.

Retail and hospitality businesses saw existing trends accelerate. Online shopping peaked during the pandemic, and is only just starting to approach its previously lower levels. Retailers also saw an acceleration of the trends that emphasize the importance of "experiences" as part of retail itself. Increasingly shopping, entertainment and dining are integrated into a single experience. While Covid's immediate impact on small retailers and hospitality establishments was devastating, this new "experience-based" approach to retail could serve to drive commerce to small shops and restaurants that can respond these new demands.

Thus, in the aftermath of the pandemic, the opportunities identified here for West Burke will persist after the pandemic and, indications are, will likely increase during the anticipated economic expansion.

### Summary of Findings

The process began by assessing West Burke's economy and identifying opportunities for the Village. It provides a preliminary concept for development of the village based upon stakeholder input and a market analysis. The market analysis focuses on four aspects of the economy: overall economic performance in various sectors, retail trade, housing and tourism. The analysis is divided into two main sections. "Understanding the Residential Market" focuses on the economic opportunities for West Burke related to the resident population. "Understanding the Tourism Market" looks at how tourism in the area may create opportunities for West Burke.

West Burke has several opportunities to bring activity and enterprises into the Village, involving specialized niches in such sectors and manufacturing, services, outdoor recreation, food-related activities, housing and culture. The findings given here should not be considered a hard and fast forecast. Rather they represent reasonable expectations, given the market dynamics at play in the local area.

**Outdoor Recreation & Food-related Businesses:** Specialty food services and outdoor recreation are in relatively strong demand by residents of the area. It should be possible to use the additional demand from visitors to help support local businesses that may be created or attracted in the areas of outdoor

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recreation, food and even cultural activities. Retail businesses may have approximately 3 employees. Restaurants in the area have an average of 7 employees.

**Housing:** There is modest demand for housing that could be captured in West Burke. This includes incremental growth in family housing, and an equally modest rise in housing units to serve the senior population as those households downsize, along with opportunities in the second home market. If, over a five-year period, forty new housing units are created in the local area, it may be possible for West Burke to capture 5 to 10 of these units as family “starter” homes, senior housing or possibly vacation homes.

**Tourism-related Demand:** As noted above, the market preferences of visitors, while not identical to residents, are highly complementary. It should be possible to use the additional demand from visitors to help support local businesses that may be created or attracted in the areas of outdoor recreation, food and even cultural activities.

**Small Scale Manufacturing:** It may be possible for West Burke to attract firms in Beverages, Food Manufacturing or Wood products. It would be reasonable to expect such an enterprise to have up to seven employees.

**Cultural Activities:** Given local interest in artisanal activities and country and rock music, it may be possible to create a local arts center in West Burke. But this is likely to be a not-for-profit that will require ongoing philanthropic support. Such an enterprise would be an important addition to the Village but could not by itself be expected to be a driver of economic revitalization.

Note: as indicated in this report, these opportunities exist in a market with relatively low levels of spending. Therefore, success in attracting or developing these opportunities in West Burke will be hard fought and may involve a limited number of enterprises with narrow profit margins. Consequently, it is important that these activities be situated in a compact geographic area so that economic activity they generate has maximum impact on the visual character and economic viability of West Burke.

### Implications for the Physical Development of West Burke

This analysis uses estimates of demand to provide a sense of how the opportunities described above might translate into developed and/or redeveloped properties in West Burke. For some activities, it is possible to use unmet demand in the area to estimate the size of the development expected in such a situation. Table 1 below shows how this is done for West Burke’s redevelopment.

The second column in Table 1 shows the amount of “leakage” by retail category within a ten-minute drive time of West Burke. (Leakage measures the extent to which spending by residents in that area exceeds sales by stores in that geographic area—c.f., page 9 below.) For example, Table 1 tells us that resident spending on restaurants exceeds sales by restaurants by \$1.2 million within 10 minutes of West Burke. A 2018 recent study of tourism spending in Vermont indicates that 35 percent of all spending on restaurants is tourism-related. To capture tourism spending for restaurants, the leakage number is divided by .065 to derived a total restaurant spending of \$1.9 million (which consists of \$1.2 million of spending by residents and \$0.7 million—or 35 percent of the total of \$1.9 million—of spending by tourists).

The resulting adjusted spending data in the third column is then divided by total retail sales per store in that category (e.g., restaurants) at the 10-minute drive time to produce an estimate of potential new establishments that could be created to capture existing uncaptured demand. Thus, for restaurants, that

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translates into 2.2 potential new restaurants. Applying that same methodology to the sporting goods category identifies the potential for 8.9 new stores, and less than one specialty food store.

<b>Table 1. Potential New Establishments in West Burke to Capture Existing Unmet Demand, 2017 data.</b>			
<b>Retail Category</b>	<b>Uncaptured Resident Spending within a 10 Minute Drive Time from West Burke</b>	<b>Spending Adjusted for tourism*</b>	<b>Potential New Establishments based upon average sales per establishment**</b>
Restaurants	\$1,248,347	\$1,920,534	2.2
Sporting Goods/Hobby/Musical Instruments	\$1,206,838	\$2,011,397	8.9
Specialty Food Stores	\$267,101	\$296,779	0.6
Source: compiled by Fairweather Consulting with data from ESRI Business Analyst. *Adjustments based upon Ken Jones, Ph.D., 2017 <i>Benchmark Report Tourism in Vermont</i> , Vermont Tourism & Marketing, Agency for Commerce & Community Development, December, 2018, p. 20. Restaurant leakage adjusted to reflect that 35 percent of restaurant spending is tourism-related.. Sporting Goods, etc. leakage adjusted to reflect that 40 percent of total outdoor recreation spending is tourism-related. Specialty Food Stores adjusted to reflect that 10 percent of total retail spending is tourism related. **Average sales/establishment calculated using data for the 10-minute drive time from West Burke, except for "Specialty Food Stores" which uses data from the 20-minute drive time since such an establishment is not found within the 10-minute drive time.			

This does not guarantee success for establishments in these categories in West Burke. For example, if two new restaurants opened in East Burke, they could capture that unmet demand. Or that unmet demand may be being supplied by restaurants outside of the 10-minute drive time. Similarly, the unmet demand for sporting goods/hobby/musical instrument stores does not necessarily mean that 8 or 9 new stores could be established in the area. Again, much of that demand may be met in other locations (e.g., St. Johnsbury) or, even more likely, by on-line sales. However, this analysis does identify those sectors for which there is sufficient demand such that a well-run, competitive establishment has the potential to succeed in the area. It also helps define the business models that may be required for success. For example, the unmet demand for specialty food stores is less than the typical sales per establishment for that type of store. This indicates that, if such a store is to succeed in the West Burke area, it must draw a disproportionate amount of its sales from tourists and others coming from outside the area.

With those caveats in place, the analysis in this report suggests the following types of development/redevelopment could take place in West Burke:

- Café/restaurant: 800 square feet
- Outfitter store/equipment rental: 1,000 square feet
- Specialty food store/processor: 1,000 square feet
- Housing: 5 units single family, 1,500 square feet each
- Apartments: 5 units; 2 bedroom(?), 800 square feet each

These represent prospective developments based upon the market analysis and, using "rules of thumb" to estimate typical square footage for each use. Nonetheless, they represent a credible starting point for building a vision for the future of West Burke.

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Note also, that as the municipal water/wastewater infrastructure comes on line, the possible types of development will expand and could include increases in housing, with growing residential population, which could also include additional 500-800 square foot enterprises (e.g., micro-brewery, wellness practitioner, etc.) for every 15-20 housing units added to the village.

### Community Meeting, September 19th, 2020

A community meeting was held to gather public input regarding a vision for the Village of West Burk on September 19, from 4 to 6PM at the Village Park. Approximately 130 people participated. Participants were asked for their responses to posters depicting various potential uses that the market analysis indicated may be viable in the Village:

- A building with a mix of local arts/crafts, offices & other uses
- Artisans/crafts manufacturing
- Café
- Space to host Equestrian trail riders
- Local food processing
- Outfitter shop for biking, snowmobiling, horse riding, etc.
- New housing in the village

Participants were asked for other ideas as well. Over the course of the gathering, virtually all of the comments received were supportive of each of the uses identified in the posters. All comments received at the community meeting are included in the appendices.

### A Vision for West Burke Village

Based upon the market analysis, stakeholder input and community response at the September 19<sup>th</sup> community meeting, the following vision has been created for the West Burke Village:

West Burke will be a mixed-use pedestrian-friendly village center providing goods and services to area residents as well as visitors in such sectors as hospitality & dining, services, outdoor recreation and housing to meet the needs of all residents.

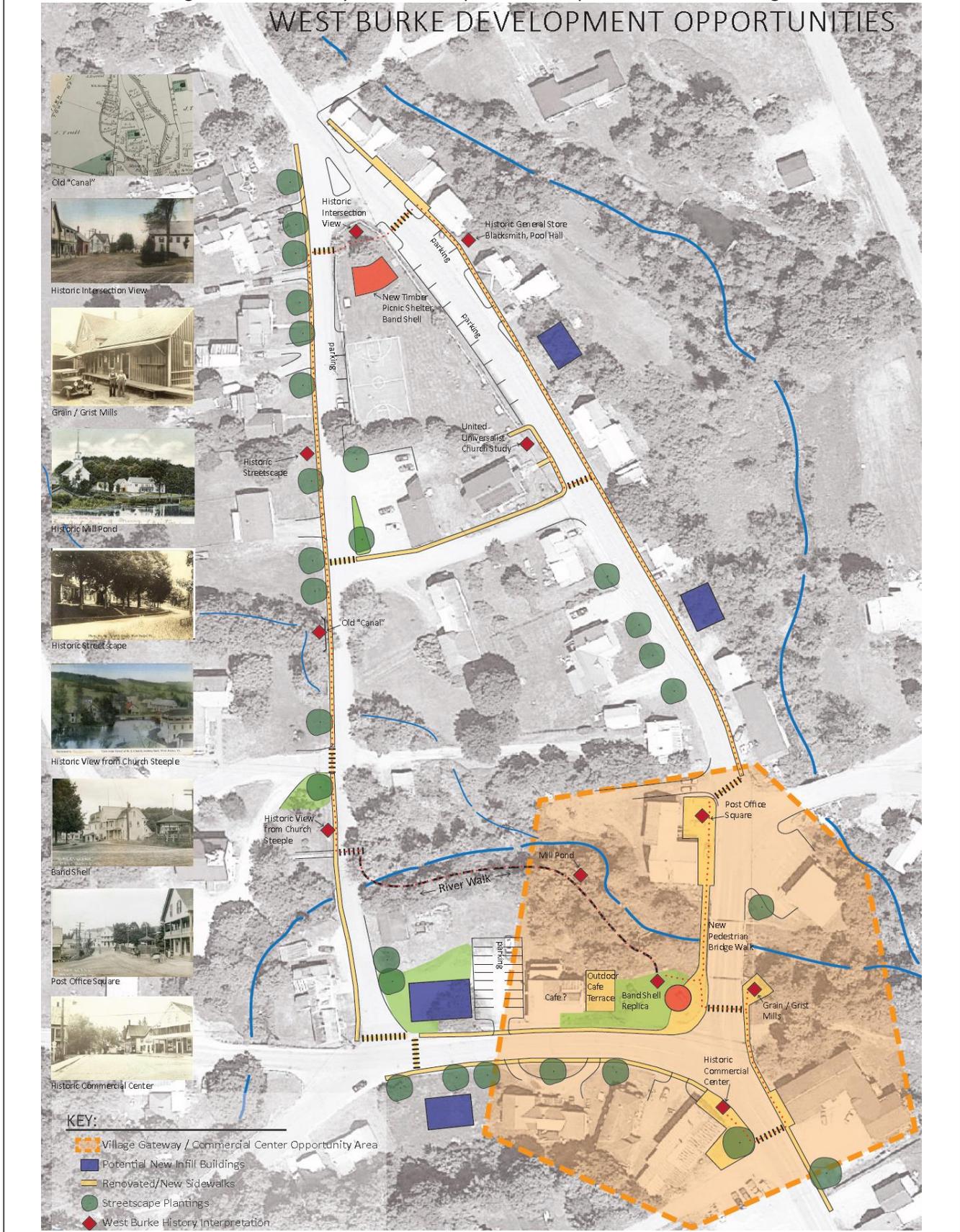
The Village's physical development pattern will revive, reinforce and build upon West Burke's historic character while providing connections to historic features and recreation opportunities.

### A Development Concept for the Village

Based upon the results of the market analysis and input from community and stakeholders, a draft rendering was made of a potential development scenario for West Burke (see Figure 1). The concept includes five elements:

1. Existing developed areas with potential for reuse/revitalization. The area for these opportunities is colored in orange. Note: at this point, the analysis indicates the best opportunities are found in the southern end of the Village, near the intersection of routes 5 and 5A. No specific buildings have been identified for development at this point.

Figure 1. Preliminary Draft Development Concept for West Burke Village.



2. Opportunities for new, infill development to restore the historic levels of density in the Village. Illustrative examples of infill are indicated by blue rectangles.
3. Opportunities to extend or create pedestrian mobility in the Village by restoring or establishing sidewalks and crosswalks in the Village. The resulting pedestrian network is indicated in yellow.
4. Streetscape enhancements through tree plantings and other initiatives, indicated in green.
5. Creation of a West Burke History Walk through the creation of kiosk and related signage throughout the Village, complemented by establishment of a River Walk along the Sutton River. The history walk signage is shown in red. The river walk is indicated by a black dotted line in Figure 1.

## II. An Action Plan for West Burke: Creating an Atmosphere for Private Investment

While West Burke has many assets that can contribute to its revival, the existing neglected conditions of some properties in the Village is not conducive to attracting and supporting private sector investment. Consequently, the revitalization of West Burke must involve re-establishing an environment that is more attractive to private investment and then working with private property owners and/or potential investors to ensure they have access to the technical and financial support to enable them begin re-investing the Village. Thus, the action plan to implement the vision for West Burke has two main elements:

1. Take on “catalytic” projects to build momentum for more investment in the Village.
2. Work with property owners in the core of the Village to secure technical & financial support for property improvements.

### Element 1. Taking on “Catalytic” Projects

In order to attract new investment, West Burke must be seen as a location capable of supporting foot traffic and social activity and the commerce that accompanies that. This means the Village must have clearly visible hubs of activity and communicate a welcoming presence to residents and visitors alike. This first step in the action plan is to initiate projects in the Village to accomplish this. These projects will provide a visible demonstration of West Burke’s attractiveness and future economic potential. They are “catalytic” in that, as visible demonstrations, they are intended to attract interest and, eventually, investments that will move West Burke towards the vision articulated above.

Three “catalytic” projects are recommended for West Burke. See Figures 2 and 3 for graphic renderings of how these projects can improve the Village.

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Figure 2. Preliminary Draft Development Concept for West Burke Gateway.

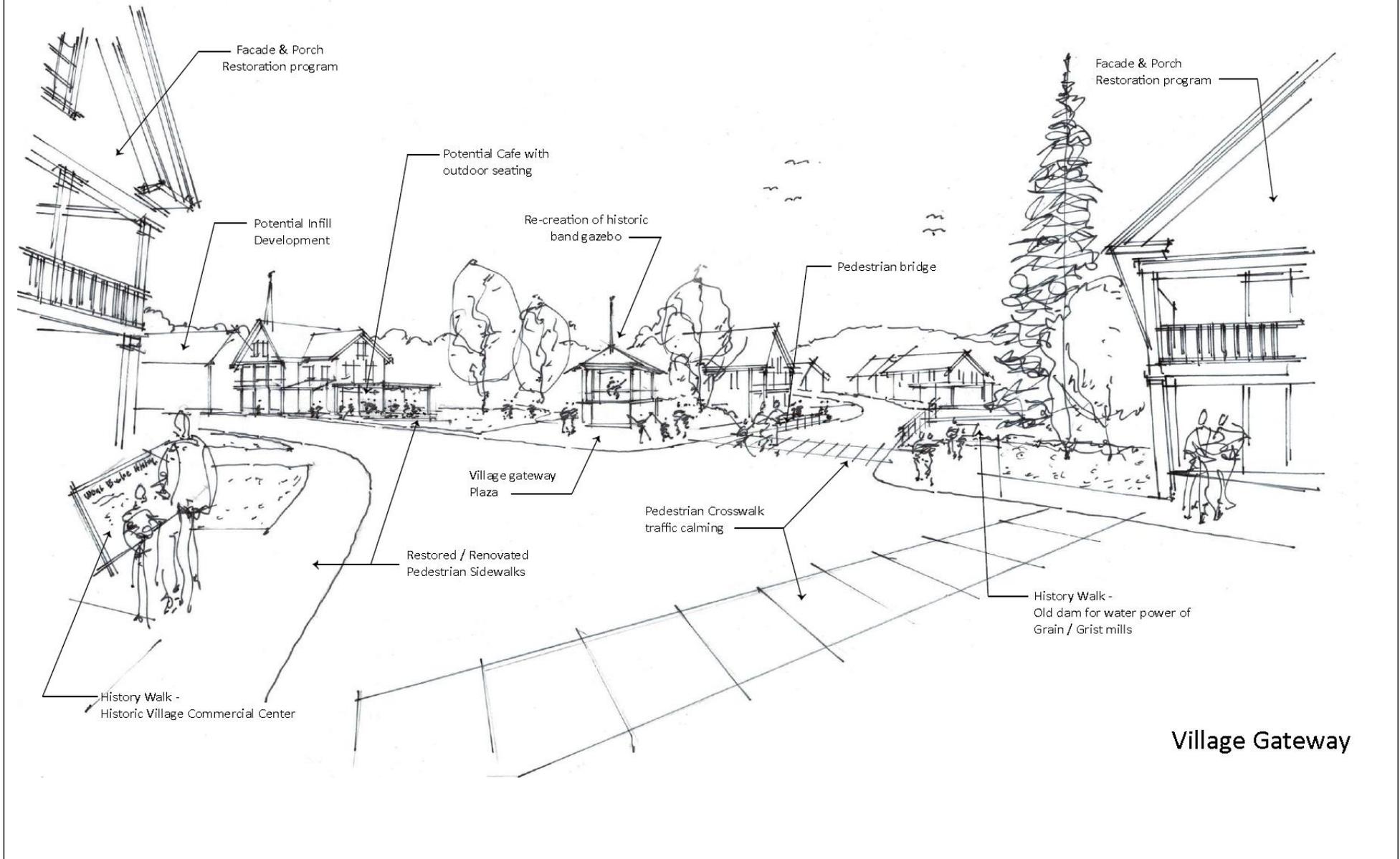
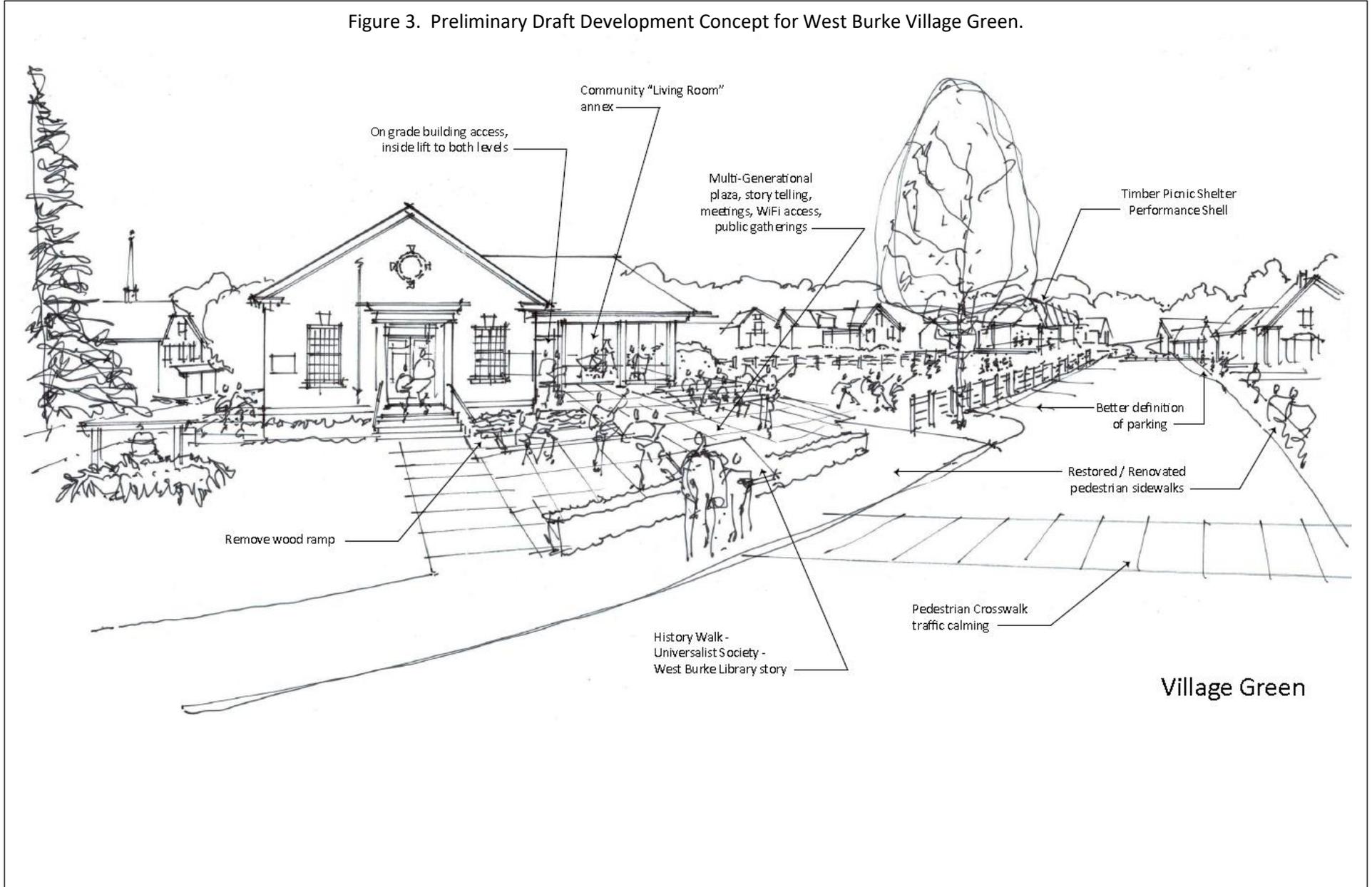


Figure 3. Preliminary Draft Development Concept for West Burke Village Green.



### Renovation of the Universalist Church/West Burke Library as a Center for Community Activities

The West Burke Library and Unitarian Universalist Church is at the very heart of the Village. The Church has hosted the library in its front rooms since 1927. The rear space is used by the congregation for services and community activities. A volunteer-run ski swap is held in the Church basement. By improving handicapped access to the building (including an accessible restroom) and expanding the community space inside and outside the building, this long-time community asset would be better able to host events and bring new activity to the center of West Burke. (See Figure 2.)

This effort could be supported through a variety of funding sources. For example, the Preservation Trust of Vermont has \$625,000 available to preserve and restore buildings and community gathering spaces of economic and social significance in rural communities. In addition, the Cultural Facilities Grant program of the Vermont Arts Council in conjunction with the Vermont Historical Society, and the Vermont Division for Historic Preservation is intended to enhance or expand the capacity of an existing building to provide cultural programming. Such sources should provide a solid foundation to secure the funding needed to transform this building into an even more valuable community asset. Additional funding sources that may be relevant to this project are included in the appendices to this report.

### Creation of a West Burke History Trail

While the Village of West Burke has been incorporated since 1901, its history goes back much further. As pointed out on the Town's website, the millpond that was once located in the Village center provided power for the sawmills that marked the first industrial development in West Burke. As forestry and agriculture flourished, the Village attracted merchants, inns, teachers, blacksmiths and other craftsmen. Next, came the railroad, helping fuel the growth of Vermont's nascent tourism industry as the Village became a point of arrival for tourists heading to Lake Willoughby.

This rich history could serve as a catalyst for attracting interest in the Village. A West Burke History Trail would include signage with consistent design and theming to highlight and link significant points of interest throughout the Village. (See Figure 1.) In addition to informing visitors and resident about local history, it can serve as a device to extend the stays of "drop in" visitors and move them through the Village, past shops, cafes, etc. Vtrans's Bicycle and Pedestrian Program provides funding for scoping, design and construction of bicycle and pedestrian facilities, including sidewalks, improved pedestrian crossings, lighting, shared use paths, etc. and could be one of the sources used to develop the History Trail. Another potential source could include the Recreational Trails Program (RTP) of the Department of Transportation's Federal Highway Administration (FHWA) to help states develop and maintain recreational trails, trail-related facilities and trailheads.

### Restoration of West Burke's Historic Streetscape

While much of West Burke's historic character is intact, much of it is obscured by the fact that the streetscape (e.g., sidewalks, street trees, benches, etc.) that served to "frame" the buildings in the Village has disappeared over time. A program to revive West Burke's sidewalks, street trees, lighting and street furniture would, with relatively little investment, dramatically improve the appearance, walkability and thereby the investment climate in the Village. These improvements could be supported through a variety of funding sources. As indicated above, the Bicycle and Pedestrian Program provides funding for scoping,

design and construction of bicycle and pedestrian facilities, including sidewalks, improved pedestrian crossings, lighting, shared use paths, etc. (See Figure 3.)

## Element 2. Work with Property Owners/Investors in the core of the Village

Part of the process of creating an atmosphere for private investment is to create a critical mass of improvements that change perceptions of an area. In this case, it is recommended that as the catalytic projects come on line, it will be important to work with property owners/investors at the southern edge of the Village, near the intersection of Route 5 and 5A. (See Figure 1.)

This area is the most visible spot in the Village. It is the place where travelers heading north on Route 5 for Lake Willoughby take Route 5A through the Village. Thus, it is the area in the Village most likely to create “first impressions” on visitors. In addition, it has the highest concentration of existing buildings in the core of the Village, many of which are in need of repair and/or renovation. Making improvements in the buildings in this area will transform the impression West Burke creates for both visitors and residents.

In order to implement this step, One Burke should establish a small committee of two or three individuals to serve as liaisons between property owners/potential investors and sources of technical and financial assistance. Once the committee is established, its members should get in touch with the individuals listed as contacts for the funding sources in the appendices to better understand the sources and how they may apply to projects in West Burke.

In addition, the committee should also make its existence known to representatives of agencies and organizations that can act as brokers between West Burke and programs for funding and technical assistance. The three key contacts have all been involved with One Burke but should be made aware of these latest efforts. They are:

Richard Amore, Planning and Outreach Manager, Department of Housing & Community Development

Phone: 802-585-0061

Email: richard.amore@vermont.gov

Ben Doyle, Executive Director, The Preservation Trust of Vermont

Phone: 802-839-9914

Email: ben@ptvermont.org

David Snedeker, Executive Director, Northern Vermont Development Association

Phone: 802-748-8303

Email: dsnedeker@nvda.net

## Getting Started: a Workshop on Realizing West Burke’s Vision

In order to ensure an effective implementation of this project, Fairweather Consulting will convene a meeting of the new Village revitalization committee, reviewing the key findings of the plan, defining critical steps and identifying key sources of funding and technical assistance. To the extent possible, this meeting will include representatives of the three organizations identified above, as well as others that may be important to the success of this effort.

### III. Understanding the Residential Market

As indicated above, West Burke has opportunities stemming from both the residential market and the tourism market. In this section, the residential market opportunities are analyzed.

The primary device used in this analysis will be to present much of the data using areas defined by the drive time from the intersection of routes 5 and 5A in West Burke. Data is presented for the 10-minute, 20-minute and 30-minute drive times. See Figure 4 for a geographic delineation of these drive times. Drive

times can be a useful way to organize data because they capture consumer behavior better than municipal boundaries or ZIP codes. As is explained below in the section on retail opportunities, consumers typically organize their purchasing patterns based upon the distance traveled to reach a particular type of store or service. People will travel up to 10 minutes to buy convenience items. They will typically travel up to 20 minutes for items purchased weekly such as groceries. Consumers may travel up to 30 minutes or more to purchase big ticket items or durable goods. So much of the data in this section is ordered accordingly.

**Table 2. Summary Data for 3 Drive Times surrounding West Burke**

<b>Data for all businesses in area</b>	<b>10 minute Drive Time</b>	<b>20 minute Drive Time</b>	<b>30 minute Drive Time</b>
Total Businesses:	64	371	1,157
Total Employees:	287	3,133	10,853
Total Residential Population:	2,495	10,561	24,490
Employee/Residential Population Ratio (per 100 Residents)	12	30	44
Source: compiled by Fairweather Consulting with data from ESRI Business Analyst.			

Table 2 summarized the economic characteristics of the three drive times. It shows that the 10-minute drive time contains 64 businesses with 287 total employees, 2,495 residents for an employee to resident ration of 12. Note that both the 20- and 30-minute drive times have higher employee to resident ratios. This indicates that the 10-minute drive time—the area most closely associated with West Burke—appears to have less economic activity on a per-resident basis than the other two drive times. This suggests that it may be more difficult to attract and sustain economic activity in that local area than it is in the larger 20- and 30-minute drive times. The analysis will occasionally return to this initial observation as we develop a more detailed understanding of the residential market and its potential opportunities.

The analysis of the residential market examines three aspects of economic activity: employment trends, shopping trends and the housing market.

#### Local Employment

Typical of a rural economy, the area surrounding West Burke is dominated by such industries as construction, manufacturing, food-related enterprises as well as those related to tourism. Table 3 shows employment by industry for each of the 3 drive times from West Burke. With 82 employees and 28 percent of all jobs, education is the largest employer in the local area (10-minute drive time). Other sectors employing over 20 workers include Construction (10 percent), Retail Trade (9.8 percent), and Food & Drinking Services. In addition, Manufacturing (18 employees—6 percent), Accommodation (5 percent) and Agriculture, Forestry & Fishing (3.5 percent) are others sectors in the double digits. With slight variations in percentages, these employment patterns are fairly consistent at the 20-minute and 30-minute drive times as well. Note that employees per business is consistently lower in the 10-minute drive time compared to the two others, consistent with the lower employee/resident ratio found in Table 3.

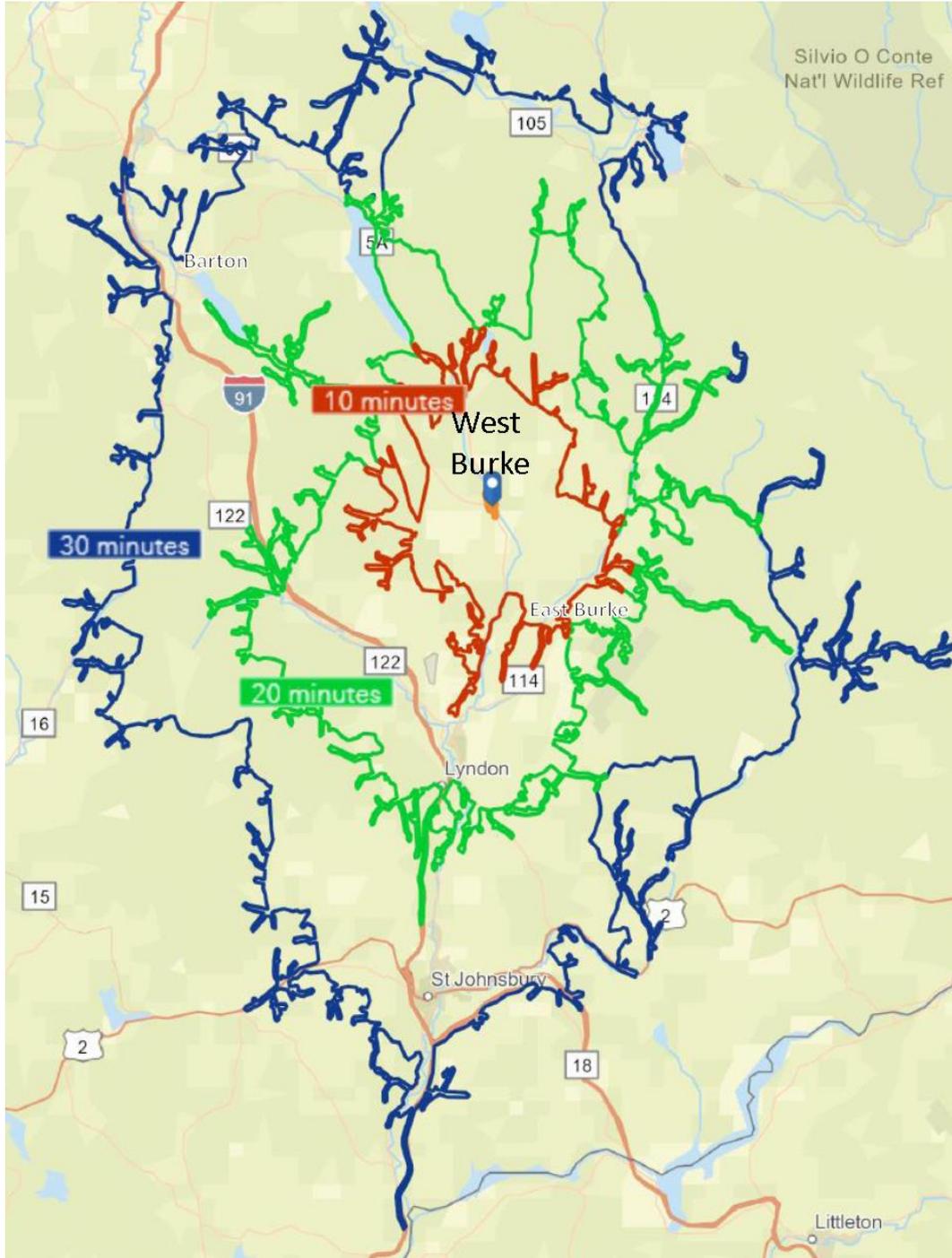
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A review of employment trends from 2009-2019 in the 30-minute drive time, the Northeast Kingdom and Vermont as a whole identified several sectors that had growth potential for the West Burke area. This analysis was conducted looking at job growth, the relative concentration of that sector in the regional economy and its ability to compete in the local region. Relative concentration was measured using location quotients.

The location quotient measures the relative concentration of employment in the sector compared to the US as a whole. If the location quotient is 1.0, the geography in question has a concentration of employment in that sector that is equal to the US as a whole. If the location quotient is greater than 1.0, employment in that sector for that region is at a higher concentration than for the US as a whole. If the location quotient is below 1.0, then employment in that sector for the region is lower as a percentage of total than it is for the US as a whole.

Local competitiveness can be examined through shift-share analysis. Shift-share Analysis attempts to determine how much of job growth can be attributed to national trends, how much is due to industrial factors, and how much is related to the locality of the industry. Essentially, shift/share analysis compares growth over a given time period (e.g., between 2009 and 2019) between a location and the larger region in which it is located across a variety of industries. It enables one to estimate how the Local Competitive Effect shape job growth in the local area.

Figure 4. 10-, 20- and 30-minute Drive times from West Burke  
(the intersection of routes 5 & 5A)



Source: ESRI Business Analyst.

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Table 3. Businesses & Employees by Drive Time from West Burke, 2019.															
by NAICS Codes	10 minute Drive Time					20 minute Drive Time					30 minute Drive Time				
	Businesses		Employees		Emp-loyees per Business	Businesses		Employees		Emp-loyees per Business	Businesses		Employees		Emp-loyees per Business
	Number	Percent	Number	Percent		Number	Percent	Number	Percent		Number	Percent	Number	Percent	
Agriculture, Forestry, Fishing & Hunting	5	7.8%	10	3.5%	2.0	11	3.0%	39	1.2%	3.5	18	1.6%	166	1.5%	9.2
Mining	0	0.0%	0	0.0%	NA	0	0.0%	0	0.0%	NA	2	0.2%	42	0.4%	21.0
Utilities	0	0.0%	0	0.0%	NA	0	0.0%	0	0.0%	NA	1	0.1%	5	0.0%	5.0
Construction	12	18.8%	29	10.1%	2.4	40	10.8%	290	9.3%	7.3	95	8.2%	737	6.8%	7.8
Manufacturing	3	4.7%	18	6.3%	6.0	18	4.9%	218	7.0%	12.1	49	4.2%	1,027	9.5%	21.0
Wholesale Trade	2	3.1%	7	2.4%	3.5	11	3.0%	108	3.4%	9.8	38	3.3%	252	2.3%	6.6
Retail Trade	9	14.1%	28	9.8%	3.1	59	15.9%	420	13.4%	7.1	179	15.5%	1,374	12.7%	7.7
Transportation & Warehousing	3	4.7%	9	3.1%	3.0	12	3.2%	106	3.4%	8.8	38	3.3%	320	2.9%	8.4
Information	1	1.6%	2	0.7%	2.0	10	2.7%	45	1.4%	4.5	30	2.6%	272	2.5%	9.1
Finance & Insurance	0	0.0%	1	0.3%	NA	11	3.0%	49	1.6%	4.5	44	3.8%	269	2.5%	6.1
Professional, Scientific & Tech Services	2	3.1%	9	3.1%	4.5	14	3.8%	46	1.5%	3.3	66	5.7%	426	3.9%	6.5
Legal Services	0	0.0%	0	0.0%	NA	3	0.8%	7	0.2%	2.3	19	1.6%	119	1.1%	6.3
Management of Companies & Enterprises	0	0.0%	0	0.0%	NA	2	0.5%	4	0.1%	2.0	5	0.4%	56	0.5%	11.2
Administrative & Support & Waste Management & Remediation Services	0	0.0%	0	0.0%	NA	8	2.2%	27	0.9%	3.4	25	2.2%	124	1.1%	5.0
Educational Services	3	4.7%	82	28.6%	27.3	14	3.8%	593	18.9%	42.4	40	3.5%	1,431	13.2%	35.8
Health Care & Social Assistance	2	3.1%	9	3.1%	4.5	17	4.6%	191	6.1%	11.2	93	8.0%	1,516	14.0%	16.3
Arts, Entertainment & Recreation	2	3.1%	2	0.7%	1.0	10	2.7%	41	1.3%	4.1	29	2.5%	150	1.4%	5.2

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Table 3. Businesses & Employees by Drive Time from West Burke, 2019.															
by NAICS Codes	10 minute Drive Time					20 minute Drive Time					30 minute Drive Time				
	Businesses		Employees		Emp-loyees per Business	Businesses		Employees		Emp-loyees per Business	Businesses		Employees		Emp-loyees per Business
	Number	Percent	Number	Percent		Number	Percent	Number	Percent		Number	Percent	Number	Percent	
Accommodation & Food Services	6	9.4%	43	15.0%	7.2	36	9.7%	439	14.0%	12.2	83	7.2%	862	7.9%	10.4
Accommodation	3	4.7%	14	4.9%	4.7	13	3.5%	91	2.9%	7.0	27	2.3%	183	1.7%	6.8
Food Services & Drinking Places	4	6.2%	29	10.1%	7.3	23	6.2%	348	11.1%	15.1	56	4.8%	679	6.3%	12.1
Other Services (except Public Administration)	8	12.5%	15	5.2%	1.9	48	12.9%	138	4.4%	2.9	158	13.7%	586	5.4%	3.7
Public Administration	3	4.7%	10	3.5%	3.3	22	5.9%	156	5.0%	7.1	83	7.2%	768	7.1%	9.3
Unclassified Establishments	3	4.7%	5	1.7%	1.7	12	3.2%	16	0.5%	1.3	32	2.8%	175	1.6%	5.5
<b>Total</b>	<b>64</b>	<b>100.0%</b>	<b>287</b>	<b>100.0%</b>	<b>4.5</b>	<b>371</b>	<b>100.0%</b>	<b>3,133</b>	<b>100.0%</b>	<b>8.4</b>	<b>1,157</b>	<b>100.0%</b>	<b>10,853</b>	<b>100.0%</b>	<b>9.4</b>
Source: compiled by Fairweather Consulting with data from ESRI Business Analyst. Copyright 2019 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2019.															
<b>Date Note:</b> Data on the Business Summary report is calculated using Esri's Data allocation method which uses census block groups to allocate business summary data to custom areas.															

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The Competitive Effect indicates whether the rate of job growth in the industry locally exceeded or trailed job growth in the industry at the national level. If the local industry growth is faster than the regional industry growth (or that the local industry has declined at a slower rate than the industry at the regional level), the Competitive Effect is positive, suggesting that the local area may be an advantageous location for that particular industry. The results are shown in Table 4.

Table 4. Potential Agriculture & Manufacturing Opportunities			
Sectors:	ZIP Codes within a 30 minute ZIP drive time from West Burke	Northeast Kingdom	Vermont
<u>Animal Production and Aquaculture</u>			
Jobs (2019)	33	436	3,045
Job Change %	10%	1%	4%
Jobs (2009)	30	431	2,936
Jobs LQ (2019)	2.46	6.10	3.20
Competitive Effect	4	14	169
<u>Food Manufacturing</u>			
Jobs (2019)	<10	333	5,466
Job Change %	Insf. Data	67%	34%
Jobs (2009)	17	199	4,066
Jobs LQ (2019)	0.03	1.22	1.50
Competitive Effect	(18)	110	895
<u>Beverage and Tobacco Product Manufacturing</u>			
Jobs (2019)	0	66	1,088
Job Change %	0%	200%	222%
Jobs (2009)	0	22	338
Jobs LQ (2019)	0.00	1.38	1.72
Competitive Effect	0	31	572
<u>Wood Product Manufacturing</u>			
Jobs (2019)	23	406	1,765
Job Change %	77%	16%	(11%)
Jobs (2009)	13	350	1,987
Jobs LQ (2019)	1.70	5.71	1.87
Competitive Effect	8	10	(479)
Source: compiled by Fairweather Consulting using EMSI data.			

Three sectors show promise for growth in the Burke area: Animal Production & Aquaculture, Food Manufacturing, Beverage & Tobacco Product Manufacturing (e.g., breweries/distilleries) and Wood Product Manufacturing, a long-time mainstay in the local economy. Animal Production is an unlikely enterprise for a village area. On the other hand, it may be possible for West Burke to attract firms in Beverages, Food Manufacturing or Wood products. Smaller enterprises from these sectors are often found in village or hamlet areas. Based on the average size of manufacturers provided in Table 2, it would be reasonable to expect such enterprises to have up to 7 employees.

### Retail Trends: Surplus/Leakage Analysis

A surplus/leakage analysis highlights the potential new retail opportunities in a given region based on consumer demand and retail sales for given markets. When local spending by residents (demand) exceeds local sales by establishments, that market is said to be experiencing leakage, indicating that consumers are shopping outside of the region for that good or service. In some cases, these goods and services are being purchased through online shopping, for example. Markets with leakage present an opportunity for the development of new stores to help capture the sales that are leaking out of the region. Conversely, when the market supply exceeds local demand, that market is said to be experiencing a surplus of sales, indicating that consumers are coming from outside the local area to purchase that good or service. These surplus markets are also important as they highlight which type of retail trade are highly competitive in the region in that they are bringing in spending from outside the area.

Examining the data by drive times is particularly useful for understanding retail trade dynamics. Tables 5 to 7 show the pattern of surplus and leakage for such goods and services for the 10-minute, 20-minute and 30-minute drive times respectively. As a general rule of thumb, consumers will travel up to 10 minutes for convenience purchases, the type that might be made on a daily basis. This could include convenience foods, personal services, etc. The 20-minute drive time is generally the limit for purchases typically made less frequently than daily, such as groceries, lawn and garden supplies, clothing, etc. The 30-minute drive time typically encompasses the extent to which consumers will travel to make infrequent purchases of big-ticket items such as autos, appliances and other durable goods.

Each of these tables includes the following information: The first few rows list summary demographics for each drive time as compiled by the data and mapping firm ESRI. This includes 2019 estimates for population, households, median disposable income and per capita income. Below the summary demographics, column 1 lists the sector under consideration, followed in column 2 by its classification under the North American Industrial Classification System (NAICS Code). The third column estimates 2017 demand by consumers in that drive time. This is developed by ESRI from the US Census Bureau's Consumer Expenditure Survey. The fourth column is ESRI's estimate of 2017 retail sales by businesses in that drive time. The fifth column, "Retail Gap" is the difference between the spending by residents and the sales by businesses in that drive time. If the sales are less than resident spending, leakage is occurring. That is, residents are spending some of their money elsewhere for that good or service. Data indicating leakage is displayed in green text. If sales are greater than resident spending, surplus is occurring; that is, spending is being attracted from outside the drive time. This data is displayed in red text. The sixth column tabulates the number of businesses in that particular retail sector in that drive time.

The seventh column provides an estimate of the number of potential new businesses that could be created if 100 percent of all of the retail sales currently leaking out of the drive time were captured by new businesses. This estimate is created by determining the average amount of sales per existing businesses and dividing that into the total amount of leakage for that particular retail category. This provides a means to assess the nature of the opportunity provided by that leakage. For example, if the amount of leakage is equivalent to the average sales per business in that category, it suggests that, in order to succeed, a new business would have to capture all existing leakage, a daunting task. On the other hand, if the existing leakage is several times greater than the average sales per store, that suggests it is much more likely that at least one new business could be supported from that leakage.

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Consumers looking to make convenience purchases typically limit their travel to less than 10 minutes. This tends to involve goods and services purchased daily such as convenience foods, personal services, gasoline, and food services. The surplus and leakage analysis for these items for the 10-minute drive time from West Burke is found in Table 5. Note that Gasoline Stations is the only sector for which there is a surplus (i.e., people appear to be coming into the area to make purchases). All other sectors show leakages. Turning to the “Potential New Businesses” column, Restaurants/Other Eating Places has enough leakage to support approximately 2 businesses and Health & Personal Care Stores has leakage to support approximately 1/5 new enterprises (again, assuming these stores could capture all existing leakage). The only other sector approaching enough leakage to support a new enterprise is Food & Beverage Stores, whose current leakage approximates 90 percent of average sales per store.

Table 5. Surplus and Leakage Analysis for the 10-Minute Drive Time from West Burke, 2017						
<b>Summary Demographics</b>						
2019 Population	2,495					
2019 Households	1,008					
2019 Median Disposable Income	\$35,902					
2019 Per Capita Income	\$22,743					
<b>2017 Industry Summary</b>	<b>NAICS</b>	<b>Demand (Retail Potential)</b>	<b>Supply (Retail Sales)</b>	<b>Retail Gap</b>	<b>Number of Businesses</b>	
Total Retail Trade and Food & Drink	44-45,722	\$29,339,763	\$8,248,364	\$21,091,399	12	
Total Retail Trade	44-45	\$26,834,827	\$7,097,362	\$19,737,465	8	
Total Food & Drink	722	\$2,504,936	\$1,151,002	\$1,353,934	4	
<b>2017 Industry Group</b>	<b>NAICS</b>	<b>Demand (Retail Potential)</b>	<b>Supply (Retail Sales)</b>	<b>Retail Gap</b>	<b>Number of Businesses</b>	<b>Potential New Businesses at 100% Capture</b>
Food & Beverage Stores	445	\$4,340,059	\$1,113,078	\$3,226,981	1	0.9
Grocery Stores	4451	\$3,802,828	\$1,004,442	\$2,798,386	1	0.7
Specialty Food Stores	4452	\$267,101	\$0	\$267,101	0	0.5
Beer, Wine & Liquor Stores	4453	\$270,130	\$0	\$270,130	0	0.1
Health & Personal Care Stores	446,4461	\$1,819,654	\$0	\$1,819,654	0	1.6
Gasoline Stations	447,4471	\$3,401,915	\$3,669,510	-\$267,595	1	-0.1
Other General Merchandise Stores	4529	\$871,603	\$0	\$871,603	0	0.6
Direct Selling Establishments	4543	\$142,150	\$0	\$142,150	0	0.1
Food Services & Drinking Places	722	\$2,504,936	\$1,151,002	\$1,353,934	4	2.9
Special Food Services	7223	\$86,716	\$31,835	\$54,881	1	0.8
Drinking Places - Alcoholic Beverages	7224	\$82,366	\$0	\$82,366	0	0.9
Restaurants/Other Eating Places	7225	\$2,335,854	\$1,087,507	\$1,248,347	2	2.4
Source: compiled by Fairweather Consulting with data from ESRI Business Analyst.						

Table 5 shows the surplus/leakage trends for sectors involving occasional purchases at the 20-minute drive time. The sectors that show promise in terms of leakage are Clothing (15 potential new businesses) and Sporting Goods/Hobby/Musical Instrument Stores (11 potential new businesses). However, it is important to note that these sectors are among those where there is a good deal of on-line purchases. Consequently, the estimates for potential new businesses are very overstated. On the other hand, there are many examples of independent merchants in these categories who have been successful by defining niches for their business based upon special product lines and/or extraordinary customer service.

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Table 6. Surplus and Leakage Analysis for the 20-Minute Drive Time from West Burke, 2017						
<b>Summary Demographics</b>						
2019 Population	10,561					
2019 Households	4,063					
2019 Median Disposable Income	\$33,550					
2019 Per Capita Income	\$21,912					
<b>2017 Industry Summary</b>	<b>NAICS</b>	<b>Demand (Retail Potential)</b>	<b>Supply (Retail Sales)</b>	<b>Retail Gap</b>	<b>Number of Businesses</b>	
Total Retail Trade and Food & Drink	44-45,722	\$114,355,182	\$95,886,242	\$18,468,940	87	
Total Retail Trade	44-45	\$104,766,728	\$82,526,462	\$22,240,266	63	
Total Food & Drink	722	\$9,588,454	\$13,359,780	-\$3,771,326	24	
<b>2017 Industry Group</b>	<b>NAICS</b>	<b>Demand (Retail Potential)</b>	<b>Supply (Retail Sales)</b>	<b>Retail Gap</b>	<b>Number of Businesses</b>	<b>Potential New Businesses at 100% Capture</b>
Bldg Materials, Garden Equip. & Supply Stores	444	\$6,334,988	\$6,727,566	-\$392,578	9	-0.5
Bldg Material & Supplies Dealers	4441	\$5,712,105	\$5,163,996	\$548,109	6	0.7
Lawn & Garden Equip & Supply Stores	4442	\$622,883	\$1,563,570	-\$940,687	3	-1.8
Clothing & Clothing Accessories Stores	448	\$6,475,193	\$270,367	\$6,204,826	1	17.5
Clothing Stores	4481	\$4,838,842	\$270,367	\$4,568,475	1	15.3
Shoe Stores	4482	\$676,391	\$0	\$676,391	0	1.0
Jewelry, Luggage & Leather Goods Stores	4483	\$959,960	\$0	\$959,960	0	2.4
Sporting Goods, Hobby, Book & Music Stores	451	\$7,106,267	\$2,889,999	\$4,216,268	8	10.1
Sporting Goods/Hobby/Musical Instr Stores	4511	\$6,660,100	\$2,064,180	\$4,595,920	6	11.4
Book, Periodical & Music Stores	4512	\$446,167	\$825,819	-\$379,652	2	-0.8
General Merchandise Stores	452	\$9,564,026	\$2,573,803	\$6,990,223	1	2.3
Department Stores Excluding Leased Depts.	4521	\$6,151,281	\$0	\$6,151,281	0	0.5
Miscellaneous Store Retailers	453	\$3,702,783	\$8,065,773	-\$4,362,990	7	-9.5
Florists	4531	\$143,339	\$87,492	\$55,847	1	0.3
Office Supplies, Stationery & Gift Stores	4532	\$1,004,250	\$6,662,476	-\$5,658,226	2	-3.6
Used Merchandise Stores	4533	\$402,537	\$723,011	-\$320,474	3	-1.7
Other Miscellaneous Store Retailers	4539	\$2,152,657	\$592,794	\$1,559,863	1	5.1
Nonstore Retailers	454	\$4,915,407	\$2,949,813	\$1,965,594	2	1.6
Electronic Shopping & Mail-Order Houses	4541	\$4,258,637	\$0	\$4,258,637	0	5.1
Vending Machine Operators	4542	\$80,931	\$0	\$80,931	0	0.1
Direct Selling Establishments	4543	\$575,839	\$2,935,631	-\$2,359,792	2	-1.6
Source: compiled by Fairweather Consulting with data from ESRI Business Analyst.						

Table 6 shows surplus and leakage for all retail sectors within the 30-minute drive time as a benchmark to evaluate market opportunities at the 10-minute drive time. For example, leakages may exist at the 10-minute drive time simply because local customers prefer driving elsewhere to shop for that particular good or service. Consequently, the leakage shown at the 10-minute drive time disappears once the drive time is extended to cover the location where the purchases are made.

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**Table 7. Surplus and Leakage Analysis for the 30-Minute Drive Time from West Burke, 2017**

<b>Summary Demographics</b>						
2019 Population	24,490					
2019 Households	9,950					
2019 Median Disposable Income	\$33,885					
2019 Per Capita Income	\$23,762					
<b>2017 Industry Summary</b>	<b>NAICS</b>	<b>Demand (Retail Potential)</b>	<b>Supply (Retail Sales)</b>	<b>Retail Gap</b>	<b>Number of Businesses</b>	
Total Retail Trade and Food & Drink	44-45,722	\$280,333,181	\$293,162,217	-\$12,829,036	241	
Total Retail Trade	44-45	\$256,528,719	\$265,606,395	-\$9,077,676	182	
Total Food & Drink	722	\$23,804,462	\$27,555,822	-\$3,751,360	59	
<b>2017 Industry Group</b>	<b>NAICS</b>	<b>Demand (Retail Potential)</b>	<b>Supply (Retail Sales)</b>	<b>Retail Gap</b>	<b>Number of Businesses</b>	<b>Potential New Businesses at 100% Capture</b>
Motor Vehicle & Parts Dealers	441	\$53,750,634	\$73,531,458	-\$19,780,824	37	-10.0
Automobile Dealers	4411	\$45,268,085	\$56,196,544	-\$10,928,459	19	-3.7
Other Motor Vehicle Dealers	4412	\$4,347,604	\$6,667,233	-\$2,319,629	4	-1.4
Auto Parts, Accessories & Tire Stores	4413	\$4,134,946	\$10,667,680	-\$6,532,734	15	-9.2
Furniture & Home Furnishings Stores	442	\$8,320,865	\$5,115,156	\$3,205,709	9	5.6
Furniture Stores	4421	\$4,978,523	\$652,801	\$4,325,722	2	13.3
Home Furnishings Stores	4422	\$3,342,343	\$4,462,356	-\$1,120,013	7	-1.8
Electronics & Appliance Stores	443	\$8,657,120	\$2,857,211	\$5,799,909	6	12.2
Bldg Materials, Garden Equip. & Supply Stores	444	\$15,261,861	\$20,152,979	-\$4,891,118	26	-6.3
Bldg Material & Supplies Dealers	4441	\$13,780,379	\$17,585,437	-\$3,805,058	21	-4.5
Lawn & Garden Equip & Supply Stores	4442	\$1,481,482	\$2,567,542	-\$1,086,060	5	-2.1
Food & Beverage Stores	445	\$41,855,741	\$68,415,256	-\$26,559,515	19	-7.4
Grocery Stores	4451	\$36,699,942	\$61,729,571	-\$25,029,629	15	-6.1
Specialty Food Stores	4452	\$2,578,602	\$492,097	\$2,086,505	1	4.2
Beer, Wine & Liquor Stores	4453	\$2,577,198	\$6,193,588	-\$3,616,390	3	-1.8
Health & Personal Care Stores	446,4461	\$17,387,970	\$14,893,269	\$2,494,701	13	2.2
Gasoline Stations	447,4471	\$32,909,227	\$32,926,477	-\$17,250	12	0.0
Clothing & Clothing Accessories Stores	448	\$16,168,428	\$3,198,121	\$12,970,307	9	36.5
Clothing Stores	4481	\$12,071,899	\$2,096,702	\$9,975,197	7	33.3
Shoe Stores	4482	\$1,683,797	\$709,254	\$974,543	1	1.4
Jewelry, Luggage & Leather Goods Stores	4483	\$2,412,731	\$392,165	\$2,020,566	1	5.2
Sporting Goods, Hobby, Book & Music Stores	451	\$17,618,260	\$5,423,630	\$12,194,630	13	29.2
Sporting Goods/Hobby/Musical Instr Stores	4511	\$16,503,420	\$4,047,604	\$12,455,816	10	30.8
Book, Periodical & Music Stores	4512	\$1,114,840	\$1,376,026	-\$261,186	3	-0.6
General Merchandise Stores	452	\$23,571,242	\$20,856,044	\$2,715,198	7	0.9
Department Stores Excluding Leased Depts.	4521	\$15,189,901	\$11,521,232	\$3,668,669	1	0.3
Other General Merchandise Stores	4529	\$8,381,341	\$9,334,812	-\$953,471	6	-0.6
Miscellaneous Store Retailers	453	\$8,987,732	\$13,352,526	-\$4,364,794	29	-9.5
Florists	4531	\$352,423	\$1,196,211	-\$843,788	6	-4.2
Office Supplies, Stationery & Gift Stores	4532	\$2,481,971	\$7,771,268	-\$5,289,297	5	-3.4
Used Merchandise Stores	4533	\$1,003,942	\$1,658,146	-\$654,204	9	-3.6
Other Miscellaneous Store Retailers	4539	\$5,149,396	\$2,726,901	\$2,422,495	9	8.0
Nonstore Retailers	454	\$12,039,637	\$4,884,268	\$7,155,369	4	5.9
Electronic Shopping & Mail-Order Houses	4541	\$10,448,533	\$836,740	\$9,611,793	1	11.5
Vending Machine Operators	4542	\$199,631	\$1,038,657	-\$839,026	1	-0.8
Direct Selling Establishments	4543	\$1,391,473	\$3,008,871	-\$1,617,398	2	-1.1
Food Services & Drinking Places	722	\$23,804,462	\$27,555,822	-\$3,751,360	59	-8.0
Special Food Services	7223	\$827,567	\$141,112	\$686,455	2	9.7
Drinking Places - Alcoholic Beverages	7224	\$778,380	\$470,029	\$308,351	5	3.3
Restaurants/Other Eating Places	7225	\$22,198,515	\$26,944,681	-\$4,746,166	51	-9.0

Source: compiled by Fairweather Consulting with data from ESRI Business Analyst.

*The Importance of Outdoor Recreation and Food*

Note that almost all of the durable goods categories (i.e., Motor Vehicle Parts & Dealers, Home Furnishing Stores, etc.) show surpluses at 30 minutes, no doubt due to the inclusion of a relatively large market center such as St. Johnsbury. More to the point, two sectors that showed leakage at the 10-minute drive time still have leakage at 30 minutes. This includes Sporting Goods/Hobby/Musical Instrument Stores (30 potential new businesses) and Special Food Services (9 potential new businesses). This reinforces the concept that it may be possible to create niche businesses in these categories that could serve the West Burke area and beyond. On the other hand, Restaurants & Other Eating Places, which showed some leakage at 10 minutes is at a surplus at the 30-minute drive time. This indicates that, if such a business were to survive in West Burke it would have to be positioned to have a strong local clientele (to absorb much of the 10-minute leakage), while still having a strong regional pull to attract restaurant goers coming into the area. (Parker Pie in West Glover is an example of such an establishment.) Given the average size of retail establishments described in Table 2, it may be reasonable to expect a retail business to have 3 employees, while a restaurant may have as many as 7 employees

*Understanding Consumer Preferences through the Market Potential Index*

The surplus/leakage analysis identified some general opportunities for West Burke is sporting goods and food-related products/services. The next question to ask is what specific items or services are demanded by residents in the area. This can be explored using ESRI's Market Potential Index.

For each geographic area, the ESRI database includes an expected number of participating households and a Market Potential Index (MPI) for each recreational activity. The MPI compares the demand for a specific product or service in an area with the national demand for that product or service. An MPI value at 100 means that the geographic area in question has a level of demand for that good or service equal to the US as a whole. A value of more than 100 represents higher demand for that product than the US as a whole, and a value of less than 100 represents lower demand than the US. For example, an index of 120 implies that demand in the area is likely to be 20 percent higher than the US average; an index of 85 implies a demand that is 15 percent lower (ESRI, 2017).

This section exams the MPI for each drive time, it is possible to begin to identify niches that could be served by establishments located in West Burke.

*Specialty Foods and the Special Case of Papa Murphy's Pizza*

The database company ESRI provides the MPI data for geographies throughout the United States and beyond. It uses national-level data to identify the consumption preferences of various demographic groups. ESRI's analysts then match the demographics of local areas to those national trends to identify the purchasing preferences of local populations. Sometimes that produces results that, while impossible to be actually true, still provide insight to local consumption trends.

For example, based upon its analysis, ESRI identifies the MPI in local areas for various chain restaurants, from Arby's to the Olive Garden. This data for the West Burke area shows that one of the chains with the highest MPI is Papa Murphy's Pizza. In fact, the closest Papa Murphy's to West Burke is over 700 miles away in Virginia. However, a closer examination of the data reveals something about the consumer market in the Burke area. Papa Murphy's chain distinguishes itself from the competition in two ways: first, its pies are prepared uncooked, for consumers to bake at home which enables it to offer higher

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quality ingredients at a comparable price to its competitors. Second, it markets its products primarily to families rather than individual consumers—the primary market for most pizza consumed in the US.

Thus, the fact that Papa Murphy’s has a high MPI in the drive times is in fact documentation of an unusually high demand for healthier, family-oriented fare. Table 8 provides some of the supporting data. The first four rows of the table provide evidence of spending for food away from home. Note that for all three drive times the Spending Index (where 100 equals the same proportion of spending on this item as the US average), is far below 100, meaning far below the US average.

The remaining rows focus on the Market Potential Index for various categories. Note that all three drive times have MPIs near or below 100 for going to drive-in/fast food restaurants, family restaurants and fine dining. But the MPI for Papa Murphy’s is 155 for the 10-minute drive time, 142 for 20 minutes and 127 for 30 minutes. This suggests that the interest in specialty foods that shows up in the MPI and surplus/leakage analysis could be tied to an interest in healthy, family-oriented dining. This is consistent with results in Table 9 which show that dining out, in general, has a high MPI. But clearly, it is the type of dining that determines how attractive the option is to local residents.

Table 8. Selected Consumer Preferences for Dining, 2017			
Dining Choice	10 minute Drive Time	20 minute Drive Time	30 minute Drive Time
2019 Food Away from Home - Meals at Restaurants/Other	\$2,236,631	\$9,125,013	\$23,264,900
2019 Food Away from Home - Meals at Restaurants/Other (Index)	63	63	66
2019 Food Away from Home - Dinner	\$1,091,545	\$4,419,920	\$11,278,132
2019 Food Away from Home - Dinner (Index)	64	63	66
2019 Went to fast food or drive-in restaurant in last 6 months	1,805	7,989	18,313
2019 Went to fast food or drive-in restaurant in last 6 months (Index)	102	102	102
2019 Went to family restaurant in last 6 months for dinner	910	3,861	8,923
2019 Went to family restaurant in last 6 months for dinner (Index)	101	97	97
2019 Went to fine dining restaurant last month	172	690	1,554
2019 Went to fine dining restaurant last month (Index)	84	76	74
2019 Went to Papa Murphy`s in last 6 months	144	585	1,197
2019 Went to Papa Murphy`s in last 6 months (Index)	155	142	127
Source: compiled by Fairweather Consulting with data from ESRI Business Analyst.			

*Other Local Preferences: Outdoor Recreation & Cultural Activities*

The results of the analysis of surplus/leakage and the MPI data indicate that outdoor recreation activities are in relatively strong demand by residents of the area. As shown in Table 8, many forms of wilderness-related outdoor recreation, from hunting and fishing to hiking to ATV/UTV use are shown to have MPIs above 100. Preferences are not as strong for outdoor recreation not related to wilderness. For example, including jogging for exercise and bicycling on the road tend to have MPIs below 100, though, like the US as a whole, the participating households comprise between 8 and 10 percent of the population.

Other topics of interest include painting/drawing, woodworking and attending performances of rock music or country music, all of which had high MPIs although they appeal to a smaller number of

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households (less than 10 percent, in most cases). It may be possible to create a local arts center in West Burke. But this is likely to be a not-for-profit that will require ongoing philanthropic support. Such an enterprise would be an important addition to the Village but could not by itself be expected to be a driver of economic revitalization.

Based on the data in Table 3, retail operations may be expected to employ about 3 individuals. Restaurants employ approximately seven people, on average.

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Table 9. Market Potential Indices for Various Goods and Services, by Drive Times, 2019.

Product/Consumer Behavior	10 minute Drive Time			20 minute Drive Time			30 minute Drive Time		
	Expected			Expected			Expected		
	Number of Adults/HHs	Percent	MPI	Number of Adults/HHs	Percent	MPI	Number of Adults/HHs	Percent	MPI
Dined out in last 12 months	1,084	55.0%	106	4,562	52.9%	101	10,458	52.6%	101
Participated in walking for exercise in last 12 months	508	25.8%	105	2,140	24.8%	101	4,838	24.3%	99
Cooked for fun in last 12 months	412	20.9%	106	1,741	20.2%	102	3,968	20.0%	101
Went to bar/night club in last 12 months	357	18.1%	105	1,441	16.7%	97	3,374	17.0%	98
Went on overnight camping trip in last 12 months	331	16.8%	135	1,398	16.2%	130	3,008	15.1%	122
Participated in fishing (fresh water) in last 12 months	318	16.1%	139	1,370	15.9%	137	2,942	14.8%	128
Participated in hiking in last 12 months	247	12.5%	102	1,035	12.0%	97	2,300	11.6%	94
Went to museum in last 12 months	236	12.0%	87	955	11.1%	81	2,127	10.7%	78
Participated in jogging/running in last 12 months	218	11.1%	86	911	10.6%	82	2,070	10.4%	81
Attended rock music performance in last 12 months	203	10.3%	108	816	9.5%	99	1,783	9.0%	94
Did photography in last 12 months	189	9.6%	98	796	9.2%	94	1,812	9.1%	93
Participated in canoeing/kayaking in last 12 months	187	9.5%	139	799	9.3%	136	1,701	8.6%	125
Did painting/drawing in last 12 months	179	9.1%	116	715	8.3%	106	1,597	8.0%	102
Participated in bicycling (road) in last 12 months	174	8.8%	91	701	8.1%	84	1,616	8.1%	84
Attended adult education course in last 12 months	168	8.5%	106	672	7.8%	97	1,420	7.1%	89
Did woodworking in last 12 months	166	8.4%	169	695	8.1%	162	1,417	7.1%	143
Participated in golf in last 12 months	160	8.1%	98	659	7.6%	92	1,505	7.6%	91
Participated in yoga in last 12 months	159	8.1%	100	642	7.4%	92	1,455	7.3%	91
Went to live theater in last 12 months	153	7.8%	70	658	7.6%	69	1,601	8.1%	73
Attended country music performance in last 12 months	147	7.5%	117	613	7.1%	111	1,338	6.7%	105
Went to art gallery in last 12 months	138	7.0%	88	568	6.6%	83	1,253	6.3%	80
Participated in boating (power) in last 12 months	127	6.4%	137	531	6.2%	131	1,144	5.8%	122
Participated in hunting with rifle in last 12 months	122	6.2%	146	566	6.6%	155	1,147	5.8%	136
Participated in aerobics in last 12 months	116	5.9%	77	526	6.1%	80	1,228	6.2%	81
Did birdwatching in last 12 months	113	5.7%	128	472	5.5%	122	1,026	5.2%	115
Danced/went dancing in last 12 months	108	5.5%	76	454	5.3%	73	1,089	5.5%	76

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Table 9. Market Potential Indices for Various Goods and Services, by Drive Times, 2019.

Product/Consumer Behavior	10 minute Drive Time			20 minute Drive Time			30 minute Drive Time		
	Expected			Expected			Expected		MPI
	Number of Adults/HHs	Percent	MPI	Number of Adults/HHs	Percent	MPI	Number of Adults/HHs	Percent	
HH owns ATV/UTV	95	9.4%	155	411	10.1%	166	883	8.9%	146
Participated in target shooting in last 12 months	94	4.8%	109	406	4.7%	108	896	4.5%	103
Attended movie in last 90 days: 2-3 times a month	92	4.7%	76	412	4.8%	78	1,000	5.0%	82
Participated in bicycling (mountain) in last 12 months	91	4.6%	110	379	4.4%	105	815	4.1%	98
Did furniture refinishing in last 12 months	90	4.6%	112	368	4.3%	105	807	4.1%	100
Attended classical music/opera performance/12 months	81	4.1%	105	334	3.9%	99	694	3.5%	90
Participated in hunting with shotgun in last 12 months	73	3.7%	110	330	3.8%	114	780	3.9%	117
Participated in backpacking in last 12 months	62	3.1%	92	281	3.3%	95	678	3.4%	100
Participated in horseback riding in last 12 months	55	2.8%	120	228	2.6%	113	482	2.4%	104
Participated in motorcycling in last 12 months	53	2.7%	88	259	3.0%	98	633	3.2%	104
Participated in archery in last 12 months	52	2.6%	97	248	2.9%	105	571	2.9%	105
Visited an indoor water park in last 12 months	51	2.6%	74	252	2.9%	83	646	3.2%	93
Participated in skiing (downhill) in last 12 months	49	2.5%	90	212	2.5%	89	477	2.4%	87
Participated in ice skating in last 12 months	48	2.4%	85	195	2.3%	79	441	2.2%	77
Participated in Pilates in last 12 months	43	2.2%	88	173	2.0%	81	374	1.9%	76
Participated in Zumba in last 12 months	41	2.1%	63	190	2.2%	67	453	2.3%	70

Source: compiled by Fairweather Consulting with data from ESRI Business Analyst.

### A Relatively Low Level of Spending

While the Market Potential Index tracks the likelihood of households or adults to buy a particular good or service, the Spending Potential Index (SPI) captures the amount spent for a product or service relative by households in a geographic area relative to a national average of 100. If households in that area spend a higher proportion of their budget on that product or service, its Spending Potential Index would be greater than 100. If household spending is less than the US average, the SPI would be under 100.

Table 10 highlights an important fact about the residential consumer market in Northern Vermont. Note that the spending indices in virtually every category are below 70. That is, these consumers typically spend 70 percent or less than typical US consumers. This suggests that attracting

Category of spending	10 minute Drive Time	20 minute Drive Time	30 minute Drive Time
Apparel & Services: Total \$	\$1,342,560	\$5,426,879	\$13,914,278
Average Spent	\$1,331.90	\$1,335.68	\$1,398.42
Spending Potential Index	62	62	65
Education: Total \$	\$963,055	\$3,776,952	\$9,861,334
Average Spent	\$955.41	\$929.60	\$991.09
Spending Potential Index	60	58	62
Entertainment/Recreation: Total \$	\$2,200,123	\$8,956,662	\$22,722,890
Average Spent	\$2,182.66	\$2,204.45	\$2,283.71
Spending Potential Index	67	67	70
Food at Home: Total \$	\$3,429,251	\$14,101,955	\$35,874,048
Average Spent	\$3,402.03	\$3,470.82	\$3,605.43
Spending Potential Index	66	67	70
Food Away from Home: Total \$	\$2,349,495	\$9,473,554	\$24,205,690
Average Spent	\$2,330.85	\$2,331.66	\$2,432.73
Spending Potential Index	63	63	66
Health Care: Total \$	\$4,123,526	\$16,774,816	\$42,658,837
Average Spent	\$4,090.80	\$4,128.68	\$4,287.32
Spending Potential Index	69	70	72
HH Furnishings & Equipment: Total \$	\$1,414,641	\$5,635,525	\$14,338,701
Average Spent	\$1,403.41	\$1,387.04	\$1,441.08
Spending Potential Index	66	65	68
Personal Care Products & Services: Total \$	\$564,865	\$2,236,530	\$5,752,420
Average Spent	\$560.38	\$550.46	\$578.13
Spending Potential Index	63	62	65
Shelter: Total \$	\$11,803,344	\$47,309,768	\$121,486,873
Average Spent	\$11,709.67	\$11,644.05	\$12,209.74
Spending Potential Index	63	63	66
Support Payments/Cash Contributions/Gifts in Kind: Total \$	\$1,641,140	\$6,626,444	\$16,951,483
Average Spent	\$1,628.12	\$1,630.92	\$1,703.67
Spending Potential Index	66	66	69
Travel: Total \$	\$1,470,507	\$5,789,291	\$14,730,416
Average Spent	\$1,458.84	\$1,424.88	\$1,480.44
Spending Potential Index	65	63	66
Vehicle Maintenance & Repairs: Total \$	\$772,167	\$3,163,116	\$8,072,300
Average Spent	\$766.04	\$778.52	\$811.29
Spending Potential Index	67	68	71
Source: compiled by Fairweather Consulting with data from ESRI Business Analyst.			

new businesses to West Burke will be a very competitive process, with businesses having to compete in markets with relatively low consumer spending.

## Housing potential

In addition to new businesses, growth in housing is another potential source to bring new activity to West Burke. An examination of housing trends in the area shows that modest growth in housing is possible.

Tables 11 and 12 contain basic information about the housing situation in the three drive times. This includes estimates for 2019 and projections for 2024, all prepared by ESRI. Note that ESRI projects modest annual increases in population for all drive times, ranging from 0.4 to 0.7 percent, along with increases in the median age as the population ages in all three drive times.

At the same time, average household size has decreased from 2000 to 2019 in all three drive times, while at the same time, average family size has increased. This can be reconciled by the fact that the proportion of nonfamily households has also increased, due to a rise in individuals living alone, which is related to the aging of the population. Consistent with this is the data in Table 11, showing an increase in housing units, responding to the modest increase in families as well as in nonfamily households. One other factor worth noting in Table 11 is the relatively high proportion of vacant housing units found in all three drive times. As in many areas with a sizeable second home population, vacation homes are often categorized as vacant if they are unoccupied during a census count or estimate. The vacancy rates reported here are testimony to the presence of a sizeable second home presence in the area.

In sum, though modest in nature, there is demand for housing that could be captured in West Burke. This includes modest growth in family housing, and an equally modest rise in housing units to serve the senior population as those households downsize. Finally, the second home market has long been an important niche for the area. This can be expected continue with the growing demand for outdoor recreation and for alternatives to year-round housing in major population centers in the wake of the COVID-19 pandemic.

For example, if, over a five-year period, forty new housing units are created in the 10-minute drive time, it may be possible for West Burke to capture 5 to 10 of these units as family “starter” homes, senior housing or possibly vacation homes.

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Table 11. Population & Household Characteristics, Including Projections			
	10 minute Drive Time	20 minute Drive Time	30 minute Drive Time
<b>Population Summary</b>			
2000 Total Population	2,059	8,874	21,893
2010 Total Population	2,279	9,734	23,182
2019 Total Population	2,495	10,561	24,490
2019 Group Quarters	2	700	1,223
2024 Total Population	2,590	10,934	25,093
2019-2024 Annual Rate	0.75%	0.70%	0.49%
2019 Total Daytime Population	1,655	9,502	25,203
<b>Median Age</b>			
2010	41.4	39.7	41.8
2019	43.7	41.8	43.5
2024	44.3	42.6	43.9
<b>Household Summary</b>			
2000 Households	791	3,335	8,785
2000 Average Household Size	2.60	2.52	2.39
2010 Households	927	3,733	9,418
2010 Average Household Size	2.46	2.41	2.32
2019 Households	1,008	4,063	9,950
2019 Average Household Size	2.47	2.43	2.34
2024 Households	1,045	4,206	10,186
2024 Average Household Size	2.48	2.43	2.34
2019-2024 Annual Rate	0.72%	0.69%	0.47%
2010 Families	619	2,374	5,888
2010 Average Family Size	2.88	2.87	2.82
2019 Families	658	2,522	6,075
2019 Average Family Size	2.91	2.91	2.85
2024 Families	676	2,589	6,170
2024 Average Family Size	2.92	2.92	2.85
2019-2024 Annual Rate	0.54%	0.53%	0.31%
<b>Median Household Income</b>			
2019	\$44,332	\$41,107	\$41,483
2024	\$47,003	\$43,784	\$44,435
<b>Median Home Value</b>			
2019	\$174,219	\$162,539	\$164,626
2024	\$179,037	\$165,644	\$168,283
<b>Per Capita Income</b>			
2019	\$22,743	\$21,912	\$23,762
2024	\$24,372	\$23,725	\$25,583
Source: compiled by Fairweather Consulting with data from ESRI Business Analyst.			

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Table 12. Housing Unit Summary.

	10 minute Drive Time	20 minute Drive Time	30 minute Drive Time
2000 Housing Units	920	4,029	11,033
Owner Occupied Housing Units	68.7%	61.1%	54.7%
Renter Occupied Housing Units	17.3%	21.7%	24.9%
Vacant Housing Units	14.0%	17.2%	20.4%
2010 Housing Units	1,105	4,595	12,118
Owner Occupied Housing Units	67.4%	60.2%	54.2%
Renter Occupied Housing Units	16.5%	21.0%	23.5%
Vacant Housing Units	16.1%	18.8%	22.3%
2019 Housing Units	1,204	5,009	12,894
Owner Occupied Housing Units	68.4%	61.5%	54.9%
Renter Occupied Housing Units	15.4%	19.6%	22.3%
Vacant Housing Units	16.3%	18.9%	22.8%
2024 Housing Units	1,245	5,183	13,230
Owner Occupied Housing Units	68.6%	61.7%	54.9%
Renter Occupied Housing Units	15.3%	19.4%	22.1%
Vacant Housing Units	16.1%	18.9%	23.0%
Source: compiled by Fairweather Consulting with data from ESRI Business Analyst.			

## IV. Understanding the Tourism Market

The analysis provided above focused on opportunities for West Burke arising from the residential population.<sup>1</sup> This section identifies opportunities based upon the current and potential tourism visitation to the Burke area, particularly as it relates to outdoor recreation tourism. The analysis identifies where tourists to Vermont are coming from and the types of outdoor recreation activities in which they are likely to participate. It also uses market segmentation analysis to better understand the socio-economic and lifestyle characteristics of these visitors and to identify other kinds of activities to which they may be attracted.

This analysis examines the current tourism market to identify potential demand for outdoor recreation-related activities as it *currently exists* in the area. The approach is to identify and better serve the needs of visitors either already coming to the area or those likely to visit to the area. Essentially, such an approach involves two steps:

Step 1: Identifying where visitors to Vermont and the Burke area come from.

Step 2: Understanding what types of outdoor recreation-related activities tourists are interested in.

Both of these steps are addressed below.

### Step 1: Where visitors to Vermont and the Burke area Come From: Mostly Local

This step was addressed using data provided by the State Agency of Commerce and Community Development. The Agency subscribes to a service which tracks the geographic origins of travelers making credit card purchases in the State. Table 1 shows the geographic location of travelers using their credit cards in the Vermont Ski Towns in 2018.

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<sup>1</sup> This analysis draws upon work that was originally conducted for the Economic & Community Development Strategy for the Town of Coventry.

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As shown in Table 13, approximately 65 percent of all card holders and 75 percent of all dollars spent come from eight geographic areas. Vermont (including the Burlington Metropolitan Statistical Area—MSA) accounted for approximately 19 percent of all card holders and 35 percent of all dollars spent—most of that originating with residents of the Burlington MSA. At the same time, the Boston MSA (including portions in both Massachusetts and New Hampshire) accounted for 18 percent of visiting card holders and 13 percent of all spending. The New York City MSA (including portions in Connecticut, New Jersey and New York) accounted for 22 percent of all cardholders and 22 percent of all spending.

The data suggest that the bulk of tourism opportunities for West Burke will come from within Vermont itself, with other visitors coming primarily from the New York, Boston and Hartford MSAs.

Table 13. Geographic Location of Credit Card Holders Purchasing Goods and Services in Vermont Ski Towns - 2018					
State	Metro Area	Percentage of all cardholders	Cumulative Percent	Percentage of all dollars spent	Cumulative Percent
VT	OTHER THAN BURLINGTON	12.52%	12.52%	31.99%	31.99%
MA	BOSTON-WORCESTER- LAWRENCE, MA-NH-ME-CT	15.15%	27.67%	12.27%	44.26%
NY	NEW YORK-NORTHERN NEW JERSEY-LONG ISLAND, NY-NJ- CT-PA	11.97%	39.65%	10.64%	54.89%
NJ	NEW YORK-NORTHERN NEW JERSEY-LONG ISLAND, NY-NJ- CT-PA	6.28%	45.93%	6.04%	60.94%
VT	BURLINGTON, VT	6.68%	52.61%	4.84%	65.78%
CT	NEW YORK-NORTHERN NEW JERSEY-LONG ISLAND, NY-NJ- CT-PA	4.77%	57.37%	4.77%	70.55%
CT	HARTFORD, CT	4.27%	61.65%	3.50%	74.05%
NH	BOSTON-WORCESTER- LAWRENCE, MA-NH-ME-CT	3.12%	64.76%	1.91%	75.96%
Source: Data on Credit Card Purchases monitored by the Vermont Agency of Commerce & Community Development					

**Step 2: The types of outdoor recreation-related activities visitors are interested in.**

In order to understand the kinds of activities in which visitors are likely to participate, data from ESRI Business Analyst (a commercial marketing database) has been collected to identify the recreation interests of residents of the geographies from which the West Burke area draws or is likely to draw its visitors.

## The Market Potential Index for Residents versus Visitors

Table 14 shows estimates of participation in various outdoor recreation activities for the 10- 20- and 30-minute drive times from West Burke, the Northeast Kingdom, the State of Vermont and the combination of the major MSAs from which out of state tourists originate. (NOTE: This data was not available for Canadian residents—an important source of Newport visitors. However, as is discussed below, it was possible to provide market segmentation data for potential visitors from Quebec.)

The table provides both the number of households participating in the activities in 2019 and the Market Potential Index for the activity in that particular geography. The activities are ranked by the number of households participating in each activity for the combined MSAs. According to Table 14, walking, jogging, hiking and road bicycling are the most popular activities in the MSAs.

## Identifying Local Versus Nonlocal Recreational Priorities

While the other geographies (e.g., the drive times, NEK Region and State) are somewhat similar in terms of the ranking of activities by popularity, there are some significant differences in terms of both the rank order of activities and, more importantly, the Market Potential Index for each activity in the different geographies. For example, all of the areas in Vermont have Market Potential Indices well above 100 for freshwater fishing, canoeing/kayaking, rifle and shotgun hunting, and ATV use.

The Market Potential Index for the MSAs for these activities is (with the exception of canoeing/kayaking), well below 100. Thus, these types of activities could be targeted primarily at participants within the Town and larger region. Other activities such as running, bicycling (both road and mountain) and skiing would be likely to attract more out-of-area participants than the activities mentioned above. On the other hand, given the large number of participants in the MSAs, such activities are still likely to draw some participation from out of state tourists as experience in the region would suggest.

The data on hunting with a rifle provides a good example of what can be learned from this data. It shows that, while only 121 households in the 10-minute drive time participated in rifle hunting, that yielded a Market Potential Index of 146, indicating that it is more popular in the 10-minute drive time than in the US as a whole. At the same time, while the Northeast Kingdom and Vermont as a whole have MPIs well above 100 for rifle hunting, the combined MSAs (which include Boston, New York and Hartford as well as Burlington) have an MPI of 56. This suggests that rifle hunting will draw local participants, and some from elsewhere in the NEK, but will be less attractive to those who come to the area from the large MSAs. On the flip side, the MPIs for downhill skiing are all below 100 for the drive times and the Northeast Kingdom, but are well above 100 for Vermont as a whole and for the MSAs, indicating that this activity is more a draw for outsiders than for those in the local area.

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Table 14.  
Number of Households Participating and Market Potential Index for Various Outdoor Recreation Activities, 2019.  
Ranked by Number of Participating Households in the Origin Metro Areas.

Activities Undertaken, 2019, Number of Households & Market Potential Index	Drive Times from West Burke			NEK	Vermont	Origin Metros Combined
	10 minutes	20 minutes	30 minutes			
Participated in walking for exercise	503	2,142	4,828	13,637	140,079	5,850,617
Market Potential Index	105	101	99	101	107	108
Participated in jogging or running	217	911	2,067	5,608	72,005	3,188,275
Market Potential Index	87	82	81	79	106	113
Participated in hiking	246	1,036	2,295	6,514	78,985	2,922,483
Market Potential Index	102	97	94	96	121	108
Participated in bicycling (road)	172	702	1,613	4,254	54,322	2,282,650
Market Potential Index	91	84	84	80	105	107
Participated in fishing (fresh water)	315	1,371	2,935	9,058	77,343	1,574,380
Market Potential Index	139	137	128	142	126	62
Participated in canoeing or kayaking	186	799	1,697	4,885	51,180	1,359,363
Market Potential Index	140	136	125	130	142	91
Participated in bicycling (mountain)	90	380	813	2,231	26,850	991,218
Market Potential Index	110	105	98	97	121	108
Participated in boating (power)	125	531	1,142	3,368	32,492	850,985
Market Potential Index	136	131	122	130	130	82
Participated in ice skating	48	195	440	1,134	16,782	749,117
Market Potential Index	86	79	77	72	111	119
Participated in skiing(downhill)	49	212	476	1,229	16,182	748,361
Market Potential Index	91	89	87	81	110	123
Participated in backpacking	61	282	677	1,816	23,240	740,666
Market Potential Index	91	96	100	97	128	99
Participated in target shooting	93	406	894	2,747	24,871	737,746
Market Potential Index	109	108	103	114	108	77
Participated in motorcycling	52	259	632	1,900	17,164	538,589
Market Potential Index	87	98	104	113	106	80
Participated in hunting with rifle	121	566	1,142	4,241	30,211	517,180
Market Potential Index	146	155	136	182	134	56
Participated in archery	52	248	569	1,836	16,809	483,248
Market Potential Index	97	105	105	122	116	81
Participated in horseback riding	54	229	481	1,455	14,958	470,612
Market Potential Index	119	114	104	113	121	92

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Table 14.  
Number of Households Participating and Market Potential Index for Various Outdoor Recreation Activities, 2019.  
Ranked by Number of Participating Households in the Origin Metro Areas.

Activities Undertaken, 2019, Number of Households & Market Potential Index	Drive Times from West Burke			NEK	Vermont	Origin Metros Combined
	10 minutes	20 minutes	30 minutes			
Participated in hunting with shotgun	72	330	777	2,879	20,649	431,998
Market Potential Index	110	114	116	155	116	59
Household owns ATV or UTV	92	411	879	3,400	20,980	297,068
Market Potential Index	152	166	145	199	129	48

Source: Compiled by Fairweather Consulting from ESRI Business Analyst.

### Tapestry Market Segmentation

To take the understanding of outdoor recreation participants to the next level of detail, using data compiled by ESRI Business Analyst, we are able to define the recreational and lifestyle preferences of population segments likely to participate in outdoor recreation. In its Tapestry database, ESRI categorizes populations according to their demographic characteristics, socio-economic status and lifestyle choices. According to ESRI:

Tapestry Segmentation, a market segmentation system designed to identify consumer markets in the United States, incorporates the effects of growth and decline in the last decade on established consumer markets plus the emergence of new markets populated by the Millennials and immigrants. Reflecting the increasing diversity among American consumers, Tapestry includes 67 distinct market segments and 14 summary groups. Tapestry is a geodemographic segmentation system that integrates consumer traits with residential characteristics to identify markets and classify US neighborhoods. Neighborhoods with the most similar characteristics are grouped together, while neighborhoods with divergent characteristics are separated. Internally homogenous, externally heterogeneous market segments depict consumers' lifestyles and lifestages. Tapestry Segmentation combines the "who" of lifestyle demography with the "where" of local geography to create a classification model with 67 distinct, behavioral market segments.<sup>2</sup>

Table 15 provides an overview of the Tapestry segments likely to be interested in outdoor recreation in the MSAs, also showing the extent to which those same segments are found in Vermont. The top four Tapestry segments for the MSAs comprise almost one-third of the total population in those areas. Those same segments comprise only 2.5 percent of the population of Vermont. Thus, the data make it clear that the population of out-of-state visitors is likely to have different characteristics and preferences than those coming from within Vermont.

To further clarify this, Table 16 contains a profile of the major Tapestry segments found in Vermont, the Northeast Kingdom, and the three drive times. These segments are quite different from those that make up the outdoor recreation market in the MSAs as shown in Table 14. Yet, most of these segments in Vermont include an interest in some form of outdoor recreation in the list of interests and preference for

<sup>2</sup> (ESRI, 2018), p. 2.

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each of these segments. So, based upon the Tapestry segments found in Vermont versus the MSAs, the outdoor recreation participants coming from within Vermont will represent different sets of preferences and demands. For example, to refer back to Table 14, while visitors from every location will have some interest in outdoor recreational activities, it will not be uniform across the geographies. Vermonters will be much more interested in hiking, hunting, fishing, ATV use than visitors from the MSAs, whereas MSA visitors will be more attracted to activities like running and mountain biking.

In addition to visitors from these MSAs, many of the out-of-state visitors are from Quebec. While Market Potential Index data was not available for Quebec, it was possible to find market segmentation data. This data was collected for the population within a 30-minute drive of the border. According to ESRI, that area encompasses 19,473 households. Table 17 shows the market segmentation profiles that account for approximately 65 percent of those households.<sup>3</sup> A description of each of these segments is found in the appendices. While they represent a variety of age and income levels, the descriptions in the appendices make clear that each segment has interests related to outdoor recreation.

Note also that each of these market segments have different levels of income and represent different opportunities in terms of things like dining, lodging and other services. Full descriptions of each of these Tapestry Market Segments is found in the appendices of this report. They can be used to understand how to provide goods and services to best respond to the preferences of the target audiences.

Clearly, the market preferences of visitors, while not identical to residents, are highly complementary. It should be possible to use the additional demand from visitors to help support local businesses that may be created or attracted in the areas of outdoor recreation, food and even cultural activities.

Table 15. Major Tapestry Household Segments with interest in Outdoor Recreation in 2019 for the top MSAs* from which Vermont Ski Towns draw visitors compared to those same segments in Vermont.						
	Total Households, Origin MSAs	% of Total	Cumulative %	Total Households, Vermont	% of Total	Cumulative %
Base for Tapestry Segmentation Households	10,222,592	100.00%		266,915	100.00%	
City Lights (8A) Tapestry Households	845,765	8.27%	8.27%	0	0.00%	0.00%
Savvy Suburbanites (1D) Tapestry Households	605,642	5.92%	14.19%	6,313	2.37%	2.37%
Top Tier (1A) Tapestry Households	592,081	5.79%	19.98%	340	0.13%	2.50%
Laptops and Lattes (3A) Tapestry Households	578,722	5.66%	25.64%	0	0.00%	2.50%
Trendsetters (3C) Tapestry Households	468,582	4.58%	<b>30.22%</b>	0	0.00%	<b>2.50%</b>
Source: Compiled by Fairweather Consulting from ESRI Business Analyst. *Source MSAs are New York, Boston, Hartford, Bridgeport, CT (part of the larger NYC MSA) and Burlington, VT, based upon 2018 data from the Vermont Agency of Commerce and Community Development.						

<sup>3</sup> Note that the market segmentation for Table 17 uses Nielsen’s PRIZM system, analogous to ESRI’s Tapestry system.

West Burke Vision & Economic Development Strategy

Table 16.  
Tapestry Segments in West Burke Drive Times, the Northeast Kingdom & Vermont Sorted by Size of Segment in Vermont.

Segment, 2019	Drive Times from West Burke						Northeast Kingdom		Vermont		
	10 minutes		20 minutes		30 minutes		Households	% of Total	Households	% of Total	Cumulative %
	Households	% of Total	Households	% of Total	Households	% of Total					
Total Sample Households	1,953	100.0%	8,636	100.0%	19,844	100.0%	28,017	100.0%	266,915	100.0%	
The Great Outdoors (6C)	905	46.3%	3,522	40.8%	5,888	29.7%	9,176	32.8%	63,397	23.8%	23.8%
In Style (5B)	0	0.0%	0	0.0%	0	0.0%	0	0.0%	30,135	11.3%	35.0%
Green Acres (6A)	0	0.0%	0	0.0%	131	0.7%	551	2.0%	19,872	7.5%	42.5%
Parks and Rec (5C)	0	0.0%	0	0.0%	1,492	7.5%	763	2.7%	12,439	4.7%	47.2%
Emerald City (8B)	0	0.0%	0	0.0%	0	0.0%	0	0.0%	11,943	4.5%	51.6%
Old and Newcomers (8F)		0.0%		0.0%	847	4.3%	469	1.7%	11,912	4.5%	56.1%
Set to Impress (11D)		0.0%	602	7.0%	1,629	8.2%	948	3.4%	9,150	3.4%	59.5%
Rustbelt Traditions (5D)	891	45.6%	2,443	28.3%	2,654	13.4%	1,017	3.6%	7,686	2.9%	62.4%
College Towns (14B)	0	0.0%	0	0.0%	0	0.0%	0	0.0%	7,511	2.8%	65.2%
Salt of the Earth (6B)		0.0%		0.0%	105	0.5%	1,807	6.5%	6,725	2.5%	67.7%
Midlife Constants (5E)	0	0.0%	38	0.4%	2,004	10.1%	894	3.2%	6,667	2.5%	70.2%
Small Town Simplicity (12C)	54	2.8%	1,313	15.2%	1,912	9.6%	3,435	12.3%	6,397	2.4%	72.6%
Savvy Suburbanites (1D)	0	0.0%	0	0.0%	0	0.0%	0	0.0%	6,313	2.4%	75.0%

Source: compiled by Fairweather Consulting from ESRI Business Analyst.

West Burke Vision & Economic Development Strategy

Table 17. Distribution of Households by Prizm Segment within a 30-minute drive from the border into Quebec.		
	2019 Households	
Prizm5 Segment	Percent	Cumulative Percent
Vieille Ecole	19.4%	19.4%
Bons Vivants	16.6%	36.0%
La Vie Bucolique	11.2%	47.2%
Fete au Village	9.2%	56.4%
Survivre en Ville	7.9%	64.3%
Source: Compiled by Fairweather Consulting using data based upon 19,473 households as compiled by ESRI Business Analyst		

#### IV. Zoning, Infrastructure and the Community Vision

The current zoning regulations for West Burke is “Village Mixed Use (VMU).” have been developed with densities that vary, based on whether or not there is municipal (“off-lot”) water and sewer present. The provisions are outlined in Table 18.

Table 18. Provisions of Current Zoning for West Burke (Village Mixed Use—VMU)					
Water/Sewer	Minimum Lot Size*	Minimum Lot Width	Front Set Back	Side Setback	Rear Setback
Off-lot water <b>and</b> sewer	.25 acre (10,890 sq.ft.)	80 feet	40 feet minimum	10 feet minimum	15 feet minimum
Off-lot water <b>or</b> sewer	.35 acre (15,246 sq.ft.)	80 feet	40 feet minimum	10 feet minimum	15 feet minimum
No off-lot water <b>or</b> sewer	.75 acre (32,670 sq.ft.)	150 feet	55 feet minimum	15 feet minimum	25 feet minimum
*Minimum lot size applies to single-lot developments.					
Source: compiled by Fairweather Consulting from Burke Zoning and Subdivision Regulations - Revised April 10, 2018					

As sewer and water infrastructure become available, the Town may wish to revise setbacks from specifying minimum setbacks to defining maximum setbacks. This will help ensure that development in West Burke is consistent with the historic character of the Village, which features buildings fronting the sidewalks along the road, creating a “street wall” that provides a more inviting pedestrian experience. (See Figure 5.)



## V. Conclusions: The Importance of Niche Operations in Manufacturing, Outdoor Recreation, Food-related Activities, Housing and Culture

Based upon the analysis compiled here, West Burke has several opportunities to bring activity and enterprises into the Village. In every case, these are specialized niches in such sectors and manufacturing, services, outdoor recreation, food-related activities, housing and culture.

***Small Scale Manufacturing:*** it may be possible for West Burke to attract firms in Beverages, Food Manufacturing or Wood products. Smaller enterprises from these sectors are often found in village or hamlet areas. Based on the average size of manufacturers provided in Table 2, it would be reasonable to expect such enterprises to have up to seven employees.

***Outdoor Recreation & Food-related Businesses:*** The results of the analysis of surplus/leakage and the MPI data indicate that specialty food services and outdoor recreation are in relatively strong demand by residents of the area. Clearly, the market preferences of visitors, while not identical to residents, are highly complementary. It should be possible to use the additional demand from visitors to help support local businesses that may be created or attracted in the areas of outdoor recreation, food and even cultural activities. Based on the data in Table 2, retail operations may be expected to employ about 3 individuals. Restaurants employ approximately seven people, on average.

***Housing:*** In sum, though modest in nature, there is demand for housing that could be captured in West Burke. This includes modest growth in family housing, and an equally modest rise in housing units to serve the senior population as those households downsize. Finally, the second home market has long been an important niche for the area. This can be expected continue with the growing demand for outdoor recreation and for alternatives to year-round housing in major population centers in the wake of the COVID-19 pandemic. For example, if, over a five-year period, forty new housing units are created in the 10-minute drive time, it may be possible for West Burke to capture 5 to 10 of these units as family “starter” homes, senior housing or possibly vacation homes.

***Cultural Activities:*** Given local interest in artisanal activities and country and rock music, it may be possible to create a local arts center in West Burke. But this is likely to be a not-for-profit that will require ongoing philanthropic support. Such an enterprise would be an important addition to the Village but could not by itself be expected to be a driver of economic revitalization.

***Tourism-related Demand:*** As noted above, the market preferences of visitors, while not identical to residents, are highly complementary. It should be possible to use the additional demand from visitors to help support local businesses that may be created or attracted in the areas of outdoor recreation, food and even cultural activities.

A final note: as indicated above, these opportunities exist in a market with relatively low levels of spending. Therefore, success in attracting or developing these opportunities in West Burke will be hard fought and may involve enterprises with narrow profit margins. Consequently, it is important that these activities be situated in a tight geographic area so that economic activity they generate has maximum impact on the visual character and economic viability of West Burke.

## Appendices

1. Potential Funding Sources to Support Implementing the Vision for West Burke
2. Description of Tapestry Target Market Segments for Vermont
3. Description of Tapestry Target Market Segments for Metropolitan Areas that are major sources of tourists to Vermont
4. Description of PRIZM5 Target Market Segments for Area of Quebec within a 30-minute drive of Newport, VT

1. Potential Funding Sources to Support Implementing the Vision for West Burke

## Potential Sources of Support

This appendix lists sources of financial and technical assistance that could prove useful in implementing this vision for West Burke's revitalization. Sources are presented under the following categories:

- Pandemic-related Support
- Benefits from Village Center Designation
- Municipal Planning Grants
- Business Assistance
- Historic Preservation
- infrastructure
- Recreation & Conservation
- Community Facilities
- Housing

Each source of assistance is briefly described and then contact information is provided for the agency and/or organization that provides the assistance. NOTE: Unless otherwise specified, all descriptive material for each source is directly quoted from the website referenced at the end of each description.

## PANDEMIC-RELATED SUPPORT

The State of Vermont has organized programs and financial support and technical assistance intended to address problems and hardship associated with the Covid-19. Pandemic. Descriptions of these programs are taken from the websites of the Agency for Commerce and Community Development.

### **CDBG CARES ACT Funding (CDBG-CV)**

On March 30, 2020 the Federal CARES Act was signed to provide states with some relief to aid during the COVID-19 pandemic. The State of Vermont received \$8,880,293 in Community Development Block Grant (CDBG-CV1, CDBG-CV2 and CDBG-CV3) funds through the U.S. Department of Housing and Urban Development Federal CARES Act which is administered by the Agency of Commerce and Community Development, Department of Housing and Community Development - Vermont Community Development Program. 70% of the CDBG-CV funding is required to serve low- and moderate-income persons. For more information about how the funding will be used review the CARES Act 3rd Amendment for 2019 Action Plan.

Currently VCDP will use CDBG-CV funds to assist municipal public facilities and service projects through its Municipal Public Facility and Service Program.

PLEASE NOTE: The Federal Register allowed the state flexibility to assist entitlements with their CDBG-CV funding. The states only entitlement the City of Burlington is eligible to apply for up to \$400,000 of the states funding for the Municipal Public Facility and Service Program to assist the City with municipal and public service projects. Please contact Community Economic Development Office (CEDO) if you are located in the City for potential assistance.

### **Municipal Public Facility and Service Program**

The Municipal Public Facility and Service Program (nearly \$2.7 million) is designed to assist communities and non-profits with grants for public facility and service projects that have unmet needs due to COVID19. Projects requesting funding for activities that construct temporary or permanent solutions to structures for meeting COVID19 code requirements are considered public facilities. Projects requesting funding to assist activities that are for new or expanded services to meet COVID19 requirements are considered public services (such as addressing physical health needs of the residents in the community for social distancing and food shelves or meals on wheels for supplies, and materials necessary to continue to carry-out their public service). It will be on a first come first serve basis and will be through a competitive application process. Public service projects serving 70% low- and moderate-income individuals is a priority which may require surveying the population served unless the project serves a population in an area-wide low- and moderate-income community.

**Range:** \$5,000 to \$200,000

**Eligibility:** Communities and Non-profits

**Deadlines:** Not specified.

**Contact:** Two River-Ottawquechee Regional Commission (TRORC)

**Email:** CDBG-CV@trorc.org

**Website:** <https://accd.vermont.gov/community-development/funding-incentives/vcdp/cdbg-cv>

### **Sole Proprietor Program**

The Sole Proprietor Program is announcing a second round of funding (additional \$1.6Million) to assist small businesses across the state. The program provides relief grants to support qualifying Sole Proprietors and will be administered on a first come, first serve basis. Applications for this second round of funding will open April 5, 2021 and run through May 26, 2021.

Sole Proprietor funding will be administered by Brattleboro Development Credit Corporation (BDCC) and Two River-Ottawquechee Regional Commission (TRORC). BDCC will be administering funds for Addison, Bennington, Lamoille, Rutland, Washington and Windham counties. TRORC will be administering funds for Caledonia, Chittenden (including the City of Burlington), Essex, Franklin, Grand Isle, Orange, Orleans, and Windsor counties.

**Range:** between \$1,500 and \$10,000 based on eligibility and the ability to document unmet need.

**Eligibility:** Sole proprietors with no employees that have been impacted by COVID-19 and have remaining unmet need that can be documented.

**Deadlines:** May 26, 2021

**Contact:**

**Email:**

**Website:** <https://www.vermont-cdbg-cv.com/>

## BENEFITS FROM VILLAGE CENTER DESIGNATION

West Burke has been designated a Village Center under the Agency for Commerce & Community Development's Village Centers program. According to the ACCD website:

Village centers are generally mixed-use areas that serve the surrounding population with goods and services, civic and religious functions, jobs, and residences. Village centers must be the traditional historic center with at least one civic or commercial building. Vermont law defines a village center as "the core of a traditional settlement, typically comprised of a cohesive mix of residential, civic, religious, commercial, and mixed-use buildings, arranged along a main street and intersecting streets that are within walking distance for residents who live within and surrounding the core." (24 V.S.A. §2793a).

Source: <https://accd.vermont.gov/community-development/designation-programs/village-centers>

West Burke's designation is up for renewal in March, 2022.

The following page contains a summary of benefits available to designated Village Centers.

## Designated Village Centers

## Benefits

### Program Benefits

The Vermont village center designation program supports local revitalization efforts across the state by providing technical assistance and state funding to help designated municipalities build strong communities. Once designated, the community will be eligible for the following benefits:

#### Technical Assistance

- Technical assistance provided by the state to support local village revitalization and planning efforts.

#### Downtown and Village Center Tax Credits

##### 10% Historic Tax Credits

- Available as an add-on to approved Federal Historic Tax Credit projects.
- Eligible costs include interior and exterior improvements, code compliance, plumbing and electrical upgrades.

##### 25% Historic Tax Credits

- Eligible facade work up to \$25,000.

##### 50% Code Improvement Tax Credits

- Available for up to \$50,000 each for sprinkler systems; up to \$75,000 for elevators; and \$12,000 for lifts.
- Eligible code work includes ADA modifications, electrical, fire safety, or plumbing up to \$50,000.

#### Priority Consideration for State Grants

- Priority consideration for various ACCD, VTrans and ANR grants and incentives including, ACCD's Municipal Planning Grants, State Historic Preservation grants, Vermont Community Development Program (VCDP) grants, VTrans Bike/Ped and Transportation Alternatives grants, Northern Border Regional Commission Grants, ANR Water and Wastewater subsidies and loans, and various other state grants and resources.

#### Priority Consideration by State Building And General Services (BGS)

- Priority site consideration by the State Building and General Services (BGS) when leasing or constructing buildings.

#### Neighborhood Development Area (NDA) Eligibility

- Communities may also designate Neighborhood Development Areas within 1/4 mile from the designated village center. Qualified projects are:
  - Exempt from Act 250 regulations for Priority Housing Projects and projects not qualifying for the exemption receive a 50% discount on application fees.
  - Exemption from the land gains tax for housing units sold.
  - Eligible for reduced state permit fees.



For more information, please contact:

Richard Amore: [richard.amore@vermont.gov](mailto:richard.amore@vermont.gov) or 802.585.0061

Website: <http://accd.vermont.gov/community-development/designation-programs/village-centers>

## MUNICIPAL PLANNING GRANTS

Grants encouraging and supporting planning and revitalization for local municipalities.

**Range:** Check website for details

**Eligibility:** Municipalities with adopted plans confirmed by their regional planning commission (Municipalities without confirmed town plans may also apply for funding for the writing of a town plan in order to gain RPC confirmation)

**Deadline:** Check website for details

Contact: Jenni Lavoie, Vermont Department of Housing and Community Development,

**E-mail:** [jenni.lavoie@vermont.gov](mailto:jenni.lavoie@vermont.gov)

**Website:** <http://accd.vermont.gov/community-development/funding-incentives/municipal-planning-grant>

## BUSINESS ASSISTANCE

### *USDA Rural Business Opportunity Grants*

This program is a competitive grant designed to support targeted technical assistance, training and other activities leading to the development or expansion of small and emerging private businesses in rural areas which will employ 50 or fewer new employees and has less than \$1 million in gross revenue.

**Range:** \$10,000 - \$500,000

**Eligibility:** RBDG funds must be directed for projects benefitting rural areas or towns outside the urbanized periphery of any city with a population of 50,000 or more.

**Deadlines:** None specified.

**Contact:** Cheryl Ducharme, Acting State Director

**Email:** Cheryl.Ducharme@usda.gov

**Website:** <https://www.rd.usda.gov/programs-services/rural-business-development-grants/vt>

### *Northern Community Investment Corporation (NCIC)*

Northern Community Investment Corporation is a Community Development Finance Institution providing capital and expertise to strengthen businesses, communities and employment opportunities across New Hampshire and Vermont.

For employers, NCIC offers large project financial packaging services along with lending solutions in partnership with banks to afford the business to retain cash equity.

## West Burke Vision & Economic Development Strategy

For small business, NCIC offers cost sharing professional services that the business may not otherwise afford.

For communities, NCIC offers project development, financial structuring, grant writing, and project and grant Management

**Range:** Varies with program and projects

**Eligibility:** Varies

**Deadlines:** Not specified.

**Contact:** Katelyn Robinson, Director of Economic Development

**Email:** [krobinson@ncic.org](mailto:krobinson@ncic.org)

**Website:** [www.ncic.org](http://www.ncic.org)

## HISTORIC PRESERVATION

### ***PRESERVATION TRUST OF VERMONT (PTV)***

#### *Paul Bruhn Historic Revitalization Grants*

PTV has \$625,000 available to preserve and restore buildings and community gathering spaces of economic and social significance in rural communities.

**Range:** Grants will be made in increments of \$50,000-\$100,000.

**Eligibility:** Examples of supported projects include roof repair or replacement, structural repairs, window and door restoration, and fire safety improvements.

**Deadlines:** January 15, 2021

**Contact:** Preservation Trust Field Service Representatives

**Email:** [ptv@ptvermont.org](mailto:ptv@ptvermont.org)

**Website:** <https://ptvermont.org/help/grants/paul-bruhn-historic-revitalization-grants/>

#### *Northeast Heritage Economy Program*

The goal of the Northeast Heritage Economy Program is to provide seed money to sub-grantees to create and/or enhance “third places” in rural communities where people gather, exchange ideas, experience culture, build relationships, and create community. These places help to make communities a desirable place to live, work, and start a business and include: non-profit, community supported stores providing space to sell and market local products; public spaces, like libraries and community centers

## West Burke Vision & Economic Development Strategy

providing critical resources for workforce development training; and cultural and arts centers offering classes, performances and partnerships.

Vermont will have two tiers of funding. The first tier, or highest priority projects, will be Community Supported Enterprises, specifically publicly-owned general stores, café, restaurants and pubs. The second tier of funding will be for preservation projects with strong economic development potential, such as job creation, business creation, workforce development, etc.

The Preservation Trust of Vermont has roughly \$230,000 available for eligible projects.

**Range:** Not specified.

**Eligibility:** Community Supported Enterprises, specifically publicly-owned general stores, café, restaurants and pubs as well as preservation projects with strong economic development potential, such as job creation, business creation, workforce development, etc.

**Deadlines:** Not specified.

**Contact:** Preservation Trust Field Service Representatives

**Email:** [ptv@ptvermont.org](mailto:ptv@ptvermont.org)

**Website:** <https://ptvermont.org/ptv-awards-nbrc-grants/>

### *1772 Foundation Grants*

In cooperation with the Preservation Trust of Vermont, the 1772 Foundation has announced that funding in the form of 1:1 matching grants of \$5,000 – 10,000 will be made available for the following historic preservation projects:

- Matching grants for exterior painting, finishes and surface restoration
- Matching grants to install or upgrade fire detection, lightning protection and security systems
- Matching grants for repairs to/restoration of porches, roofs and windows
- Matching grants for structural foundation and sill repair/replacement
- Matching grants for chimney and masonry repointing

To demonstrate the sustainability of historic sites, applicants may be required to submit a cyclical maintenance plan, condition assessment, restoration plan or stewardship plan that has been prepared or updated within the last five years. If an appropriate plan does not exist, the Foundation will consider providing support for development of a plan on a case-by-case basis.

**Range:** matching grants of \$5,000 – 10,000 (100% match)

**Eligibility:** See description above

**Deadlines:** Not specified.

**Contact:** Preservation Trust Field Service Representatives

**Email:** [ptv@ptvermont.org](mailto:ptv@ptvermont.org)

**Website:** <https://ptvermont.org/help/grants/1772-foundation-grants/>

*The Robert Sincerbeaux Fund Grants*

The RSF grants are often used to hire a preservation contractor or architect to evaluate the condition of an historic building and make recommendations for its care. The consultant will prepare a report that prioritizes repairs and gives rough cost estimates so groups can plan fundraising strategies. A corps of qualified consultants have generously offered to do assessments for nonprofit organizations for a flat fee of \$500; the Preservation Trust grant pays for half.

The grants may also be used for any other technical assistance that will move a project along its timeline. Eligible activities may include organizational development, project planning, fundraising consultation, feasibility assessment, and other project development activities.

**Range:** \$250 (100% match)

**Eligibility:** Not specified.

**Deadlines:** Rolling

**Contact:** Preservation Trust Field Service Representatives

**Email:** [ptv@ptvermont.org](mailto:ptv@ptvermont.org)

**Website:** <https://ptvermont.org/our-work/grants/rsf/>

*The Barn Grant Program*

The Barn Grant Program offers small planning grants to help with condition assessments for historic barns. These grants offset the cost of hiring a qualified contractor to evaluate the condition of an historic barn and make recommendations for its care. The consultant will prepare a report that prioritizes repairs and gives rough cost estimates. The condition assessments cost \$500, of which a grant from the Preservation Trust pays \$250.

Barn Grants have a. Applications are initiated by contacting our and setting up a site visit. Please be prepared to describe what you know is wrong with your building and any concerns you have at that time.

**Range:** \$250 (100% match)

**Eligibility:** Not specified.

**Deadlines:** rolling deadline

**Contact:** Preservation Trust Field Service Representatives

**Email:** [ptv@ptvermont.org](mailto:ptv@ptvermont.org)

**Website:** <https://ptvermont.org/our-work/grants/barn-grants/>

*Preservation Grants*

Through a partnership with the Freeman Foundation, Preservation Grants are available to non-profit organizations and municipalities for rehabilitating historic buildings in the Northeast Kingdom.

Eligible projects must have strong community support, as demonstrated by volunteer and fundraising efforts. Grants typically range from \$25,000 to \$45,000 and are offered once a year, typically in the spring.

Preservation Grants are usually awarded after ongoing work with the Preservation Trust. If you haven't done so already, please contact our Preservation Field Staff to discuss your project.

**Range:** \$25,000 to \$45,000

**Eligibility:**

**Deadlines:** Not specified (typically in Spring)

**Contact:** Preservation Trust Field Service Representatives

**Email:** [ptv@ptvermont.org](mailto:ptv@ptvermont.org)

**Website:** <https://ptvermont.org/our-work/grants/preservation-grants/>

*Historic Places Revolving Fund*

In June 2011, the Preservation Trust of Vermont established a Historic Places Revolving Fund with a \$65,000 grant from the 1772 Foundation — a Connecticut-based foundation that helps preservation projects and organizations around the nation. The goal of the fund is to acquire options on properties that are threatened in one way or another and then to find new owners and new economic uses for them.

**Range:** Not specified.

**Eligibility:** Not specified.

**Deadlines:** Not specified.

**Contact:** Preservation Trust Field Service Representatives

**Email:** [ptv@ptvermont.org](mailto:ptv@ptvermont.org)

**Website:** <https://ptvermont.org/our-work/revolving-fund/>

**VERMONT DIVISION FOR HISTORIC PRESERVATION**

The Vermont Division for Historic Preservation is able to award competitive 50/50 matching grants of up to \$15,000 for the repair of historic agricultural buildings. In order to qualify, the buildings must be at least 50 years old and either listed in, or eligible to be listed in, the National Register of Historic Places.

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### *Reimbursement Grant Programs*

The following are reimbursement grant programs, which means that if you are awarded a grant, you are responsible for paying for the full amount of the project and the State will reimburse you once the project and required paperwork are completed.

#### *Historic Preservation Grants*

The Historic Preservation Grant Program helps municipalities and non-profit organizations rehabilitate the historic buildings that are a vital part of Vermont's downtowns, villages, and rural communities, as well as its iconic landscape.

**Range:** 50/50 matching grants of up to \$20,000

**Eligibility:** municipalities and non-profit organizations

**Deadlines:** October 2021

**Contact:** *Caitlin Corkins, Tax Credits & Grants Coordinator*

**Email:** [caitlin.corkins@vermont.gov](mailto:caitlin.corkins@vermont.gov)

**Website:** <https://accd.vermont.gov/historic-preservation/funding/historic-preservation-grants>

#### *Barn Preservation Grants*

The Barn Preservation Grant program helps individuals, municipalities, and non-profit organizations to rehabilitate the historic agricultural buildings that are a symbol of Vermont's rural landscape. This is the oldest state-funded agricultural-based grant program in the United States.

**Range:** 50/50 matching grants of up to \$15,000

**Eligibility:** municipalities and non-profit organizations

**Deadlines:** November 2021

**Contact:** *Caitlin Corkins, Tax Credits & Grants Coordinator*

**Email:** [caitlin.corkins@vermont.gov](mailto:caitlin.corkins@vermont.gov)

**Website:** <https://accd.vermont.gov/historic-preservation/funding/historic-preservation-grants>

### *Certified Local Government Grants*

Vermont established its Certified Local Government (CLG) program in 1985 to better help local governments integrate historic preservation concerns with planning and decision-making processes. Because preservation most often happens at the local level, joining the CLG program is an important and effective way to preserve Vermont's historic places.

Certified communities are eligible to apply for a matching grant for preservation projects. VDHP awards 10% of its annual federal appropriation from the Historic Preservation Fund to CLG projects and educational opportunities each year. These grants are typically for projects in the \$5,000-\$10,000 range.

## West Burke Vision & Economic Development Strategy

In many cases, the products generated by CLG grants have provided credibility and visibility for Vermont's local historic preservation program.

**Range:** \$5,000-\$10,000

**Eligibility:** Certified Local Governments

**Deadlines:** Annually in December

**Contact:** Devin Colman, State Architectural Historian

**Email:** [devin.colman@vermont.gov](mailto:devin.colman@vermont.gov)

**Website:** <https://accd.vermont.gov/historic-preservation/funding/clg-grants>

### *Federal Rehabilitation Tax Credits*

Federal Rehabilitation Investment tax credits are available for eligible historic commercial buildings, meaning income-producing buildings, listed in the National Register of Historic Places. Many of Vermont's designated downtowns and villages are listed and pre-qualified for federal credits.

**Range:** Not specified.

**Eligibility:** Owners of eligible historic commercial buildings

**Deadlines:** July 1, 2021

**Contact:** Caitlin Corkins, Tax Credits & Grants Coordinator

**Email:** [caitlin.corkins@vermont.gov](mailto:caitlin.corkins@vermont.gov)

**Website:** <https://accd.vermont.gov/historic-preservation/funding/tax-credits>

## INFRASTRUCTURE

Northern Border Regional Commission.

The Northern Border Regional Commission (NBRC) invests in economic and infrastructure projects in the following Vermont counties: Addison, Bennington, Caledonia, Chittenden, Essex, Franklin, Grand Isle, Lamoille, Orange, Orleans, Rutland, Washington, Windham, Windsor. Depending on the level of economic and demographic distress in each county, NBRC funded projects can be eligible for up to an 80% matching grant. Among its several programs, the NBRC manages the Economic & Infrastructure Development Investment Program. The EID Investment Program provides Federal grants to employment generating projects. These projects have helped reduced poverty, lower unemployment, and reduce outmigration. Prioritized grant projects include those that:

- Revitalize and modernize essential infrastructure in Northern Border region communities,

## West Burke Vision & Economic Development Strategy

- Increase access, affordability, and use of high-speed telecommunications by Northern Border residents and businesses,
- Stabilize and reduce electric and thermal energy costs,
- Retain, expand and diversify business enterprise that capitalizes on the region's natural, cultural, and economic assets,
- Position the Northern Border region as an attractive and supportive place for creative and entrepreneurial people,
- Support and expand a highly productive workforce with skills suited to existing and future business needs,
- Foster entrepreneurial leadership and capacity for community economic development, and
- Inform and align local, state, and regional economic development decision making with regional data and perspectives.

**Range:** \$500,000 maximum award to eligible infrastructure projects, up to a \$250,000 maximum award for all other types of eligible projects

**Eligibility:** Public bodies, non-profits (501(c)), and state governments. Awards in Caledonia County require a 20% match. Funds can be used as match for leveraging other Federal grants, up to 80% of the total project.

**Deadline:** Annually in May

**Contact:** Kristie Farnham, NBRC Program Manager at VT ACCD

**Email:** Katie.corrigan@vermont.gov

**Website:** <http://www.nbrc.gov/content/vermont>

### *Bicycle and Pedestrian Program Grants*

The Bicycle and Pedestrian Program is administered by VTTrans and provides funding for scoping, design and construction of bicycle and pedestrian facilities, including sidewalks, improved pedestrian crossings, lighting, shared use paths, etc.

**Range:** No minimum or maximum cost. Local match of 50% for scoping and 20% for construction is required.

**Eligibility:** Municipalities, RPCs, schools districts, transit agencies

**Deadline:** Annually in July

**Contact:** Jon Kaplan

**Email:** jon.kaplan@vermont.gov

**Website:** <http://vtrans.vermont.gov/highway/local-projects/bike-ped>

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### *Transportation Alternatives Program*

The TAP provides grant funding for scoping, design and construction of on and off-road facilities for pedestrians, bicyclists and other non-motorized forms of transportation, including sidewalks, bicycle infrastructure, pedestrian and bicycle signals, lighting and other safety and accessibility related infrastructure, environmental remediation related to transportation, community improvement related to transportation, Safe Routes to School programs.

**Range:** Up to \$300,000

**Eligibility:** Municipalities, RPCs, school districts

**Deadline:** Annually in October

**Contact:** Scott Robertson

**Email:** [scott.robertson@vermont.gov](mailto:scott.robertson@vermont.gov)

**Website:** <http://vtrans.vermont.gov/highway/local-projects/transport-alt>

## RECREATION AND CONSERVATION

### *VOREC Community Grant Program*

The Vermont legislature established the Vermont Outdoor Recreation Communities pilot grant program in 2018 with the passage of Act 194. The program's purpose is to make grants available to help Vermont communities fully leverage their local outdoor recreation assets to achieve a status of being a truly "outdoor recreation friendly community" as envisioned by the Vermont Outdoor Recreation Economic Collaborative (VOREC) steering committee. VOREC's goals are to:

- Grow the outdoor recreation related business opportunities
- Increase participation in outdoor recreation activities
- Strengthen the quality and extent of outdoor recreation resources
- Increase stewardship of outdoor recreation resources

Grant funding can be used for a variety of purposes with the result being a community(ies) that can show measurable success supporting and growing their local economies through leveraging outdoor recreation.

**Range:** Not specified.

**Eligibility:** Municipalities

**Deadline:** Not specified.

**Contact:** Jessica Savage

**Email:** [jessica.savage@vermont.gov](mailto:jessica.savage@vermont.gov)

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**Website:** <https://fpr.vermont.gov/vorec-community-grant-program>

### *Land and Water Conservation Fund*

LWC funds are administered by the Department of Forests, Parks and Recreation (FPR) for the acquisition of land for parks and public outdoor recreation, or development of new facilities and/or renovation of existing facilities for outdoor recreation. The

**Range:** Not specified. A 50% local match is required

**Eligibility:** Municipalities and state agencies

**Deadline:** Pre-Application in October; Full application in December

**Contact:** Jessica Savage

**Email:** [jessica.savage@vermont.gov](mailto:jessica.savage@vermont.gov)

**Website:** <https://fpr.vermont.gov/land-and-water-conservation-fund>

### *Recreational Trails Program Grants*

The Recreational Trails Program (RTP) is a federally funded program of the Department of Transportation's Federal Highway Administration (FHWA), administered at the State level to help states develop and maintain recreational trails, trail-related facilities and trailheads. Both motorized and non-motorized trail projects may qualify for RTP funds.

**Range:** up to \$50,000

**Eligibility:** Municipalities, other governmental entities, and non-profit organizations

**Deadline:** Pre-applications are due December 1; Full applications due February 1

**Contact:** Sherry Smecker Winnie, Vermont Forests, Park and Recreation

**Email:** [sherry.winnie@vermont.gov](mailto:sherry.winnie@vermont.gov)

**Website:** <https://fpr.vermont.gov/recreational-trails-program>

## COMMUNITY FACILITIES

### *Community Facility Loans and Grants*

Federal USDA Rural Development loans and grants to assist rural communities develop or improve essential community facilities, including theaters, community centers, museums, libraries, adult and childcare centers, and municipal buildings. Funds may be used for acquisition, construction or improvements to buildings and equipment.

**Range:** Grants up to \$50,000 or 75% of the project cost, whichever is less. Grant applicants must show financial need. A larger than 25 percent match for grants may be required based on the applicant's service

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area population and income level (see list on website). Loans have no \$ limit and 100% financing can be provided. Interest rates are long term and fixed rates based on municipal bond rates.

**Eligibility:** Non-profit corporations and public bodies serving communities of less than 20,000 population (see list on website).

**Deadlines:** Ongoing, but contact appropriate Rural Development office early in project development.

**Contact:** Cheryl Ducharme, Acting State Director

**Email:** Cheryl.Ducharme@usda.gov

**Website:** <https://www.rd.usda.gov/programs-services/community-facilities-direct-loan-grant-program/vt>

### *Cultural Facilities Grant Program*

The cultural facilities grant program is administered by the Vermont Arts Council in conjunction with the Vermont Historical Society, and the Vermont Division for Historic Preservation. The purpose of the program is to enhance or expand the capacity of an existing building to provide cultural programming. The program awards grants on a competitive basis to nonprofit organizations and municipalities to make improvements to community facilities that provide cultural activities for the public.

**Range:** \$1,000 - \$30,000 and require a 1:1 match. The matching funds must be either cash, or 50% cash and 50% in-kind.

**Contact:** Sonia Rae, Artist and Community Services Manager, Vermont Arts Council

**Email:** [srae@vermontartscouncil.org](mailto:srae@vermontartscouncil.org)

**Website:** <http://www.vermontartscouncil.org>

## HOUSING

### *Landlord Repair Program*

The Landlord Repair Program assists landlords with low-interest loans and grants, through our Revolving Loan Fund, to address health & safety repairs to their units to keep their units on the housing market and safe for the tenants who live in them.

This program is being further developed with funding from the Governor's latest budget and, upon approval, will allow us to assist landlords in other ways with programs offered through COVID relief funding. Eligible Health & Safety repairs include:

- Electrical work
- Plumbing repair

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- Water & Well system work
- Roof repair
- Structural repair
- Accessibility improvements

**Range:** low-interest loans and up to \$5,000 in grant eligibility per unit

**Eligibility:** Landlords with units in Caledonia, Essex and Orleans counties

**Deadlines:** Not specified.

**Contact:** Jan Wade, HOC Office Services Specialist

**Email:** janw@ruraledge.org

**Website:** <https://ruraledge.org/rental-repair>

### *Home Repair Program*

The Home Repair Program is designed to assist income-eligible homeowners with low-interest rehab loans and grants, through our Revolving Loan Fund, to make health & safety repairs to live safely in their home. Eligible repairs may include:

- New roofs or Roof Repairs
- Structural & Foundation work
- Heating system maintenance or replacement
- Accessibility improvements
- Electrical repairs
- Weatherization and window replacement
- Plumbing repair
- Water & Well system repairs
- Septic System repair

**Range:** Not specified.

**Eligibility:** Homeowners who are residents of Caledonia, Orleans, or Essex counties at or below 80% of area median income.

**Deadlines:** Not specified.

**Contact:** Victoria Malick, Homeownership Specialist

**Email:** victoriam@ruraledge.org

**Website:** <https://ruraledge.org/home-repair>

2. Description of Tapestry Target Market Segments for Vermont

3. Description of Tapestry Target Market Segments for Metropolitan Areas that are major sources of tourists to Vermont

4. Description of PRIZM5 Target Market Segments for Area of Quebec within a 30-minute drive of Newport, VT

5. Results of Community Meeting on September 19, 2020