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APPENDIX A: STATE OF THE REGION

I. Introduction

This State of the Region report highlights points raised by local and regional data, as well as qualitative data from Dover-Wilmington residents, officials and businesses. The intent of the “State of the Region” is to provide community leaders with information required to make decisions on the economic future of their individual towns as well as the region.

II. Review of Existing Materials/Studies

There is no shortage of information and data to guide Wilmington and Dover toward a regional economic development strategy. The State of Vermont, the Windham Regional Planning Commission, and local planners have all created and accumulated substantial banks of facts, figures and initiatives. In preparing this Report, the Regional Plan, Town Plans, annual reports, Vermont Labor Data were reviewed along with the business plan from the Dover Economic Development Committee. The Tri-Town Economic Development forums produced numerous ideas for consideration and a preliminary work plan. Mt. Snow graciously provided private ski market and labor data.

In addition, conversations were held with community officials, Mt. Snow staff, business people and residents from both communities. On numerous topics, there was considerable consistency. All continue to point to Vermont and the Mt. Snow Valley as a special place worthy of protecting, but needing an economic push.

The following list summarizes the consistent and key goals and recommendations from the studies (not in particular order):

1. Encourage community connections. Explore regionalism for infrastructure and services. Continue the efforts of the Tri-Town Economic Development Committee. Currently not perceived as one valley; must unite as one. Create an identity and gel.
2. Enhance and expand high speed internet and cellular phone service. Visitors expect it. Businesses need it. Digital technology should be affordable and accessible to all.
3. Build on the recreational assets of the region. Promote trails, paths, waterways and ski areas. Create venues for recreation and gathering. Increase the number of events in the region.
4. Continue to grow as Vermont villages. Avoid connecting strip development and instead alter, expand or create villages. Balance growth of town centers with the protection of the Vermont landscape.
5. Marketing is and will continue to be a priority. Continue to work on Regional Branding and signage.
6. Second homeowners enhance the economy of the region.
7. Non-tourist growth is important, but not as broadly prioritized as the tourist economy. State support should focus on entrepreneurial growth. Diversify business growth. Attract and encourage the development of new businesses. Agriculture and forestry should remain key components of the region’s economy. How can they be made sustainable?
8. Housing prices affect the labor force. Allow for higher density housing.
9. Create a Route 100 Master Plan.
10. Goal to provide a Strong Diverse Economy that Provides Satisfactory and Rewarding Job Opportunities, Maintains Environmental Standards, and Expands Economic Opportunities for People in all income brackets.
11. Balance.

III. Employment and Labor Force

Employment in the leisure/hospitality sector generally is seasonal in nature. Service sector jobs also typically have non-traditional shifts, which may include early morning, longer shifts, weekend and/or evening hours. As noted in the accompanying Data Report, the regional economy is more affected by hard fiscal times which affect recreation, leisure and travel. The region's unemployment rate is well above the Vermont total rate. Brattleboro, by comparison, had an unemployment rate of 6.7% in May, 2009.

2008 Annual Vermont labor Force and Unemployment Rate

	2008 Annual			May 2009		
	Vermont	Dover	Wilmington	Vermont	Dover	Wilmington
Labor Force	356,400	930	1,430	358,800	980	1,480
Unemployment Rate	4.7%	7.9%	6%	6.8%	14.9%	11.7%

Monthly Labor Force and Unemployment Rates

	Dover, VT		Wilmington, VT	
	Labor Force	Unemployment Rate	Labor Force	Unemployment Rate
May 2009	980	14.9%	1,480	11.7%
April 2009	970	14.4%	1,460	11.0%
March 2009	910	7.2%	1,410	5.9%
February 2009	910	6.7%	1,410	5.4%
January 2009	910	7.1%	1,410	5.5%
December 2008	910	6.5%	1,420	5.4%
November 2008	940	9.4%	1,440	7.1%
October 2008	910	6.5%	1,430	6.0%
September 2008	920	8.3%	1,420	6.3%
August 2008	930	8.1%	1,420	5.5%
July 2008	950	9%	1,450	6.2%
June 2008	970	11.1%	1,470	7.4%
May 2008	960	12.7%	1,460	9.0%
April 2008	930	8.4%	1,450	7.7%
March 2008	900	4.6%	1,410	4.4%
February 2008	900	4.3%	1,400	3.4%
January 2008	910	5.4%	1,410	3.9%

Source: Vermont Department of Labor: Economic & Labor Market Information

According to the Windham Regional Planning Commission, some of the largest service employers in the region are health care providers, including: The Brattleboro Retreat, Eden Park Nursing Home, Brattleboro Memorial Hospital, and Carlos G. Otis Health Care Center. Some of these service providers are amongst the fast growing and high-wage areas of the economy, in part because of the growth in the health service industry. The State of Vermont projects that the fastest growing occupations in Vermont through 2010 are found in the health care and education areas:

Occupation	Annual Growth Rate	Total annual openings
Personal and Home Care Aides	4.3%	395
Home Health Aides	3.6%	71
Registered Nurses	2.5%	240
Pre-school Teachers	1.8%	29

Overall, Vermont expects to lose 2.6% (9,237) of its jobs by 2010. This includes a 2.8% reduction in the number of recreation/leisure services jobs and a 4.2% reduction in the Food and Drinking Services industry. Retail jobs will decrease between 2% and 8% depending on the merchandise.

Long-term projections from the Vermont Department of Labor, Economic & Labor Market Information for job growth in Southern Vermont show that the health and education trend will continue to lead the regional demand for labor with growth around 3% per year. Beyond these areas, the State anticipates significant growth in jobs for software engineers and data communications analysts with growth over two percent. However, other occupations in the region will have growth of less than 1% per year or have a decrease in occupational availability.

The region's residents historically have traveled to other areas of the State and other states to find employment.

Place of Work for Windham Region Workers

Place of Work	1990	2000
Brattleboro	42%	35%
Windham Region (not including Brattleboro, Rockingham, Wilmington/Dover)	23%	31%
Rockingham	10%	7%
Dover/Wilmington	9%	9%
Vermont Towns outside of Windham Region	5%	5%
New Hampshire	6%	6%
Massachusetts	5%	5%

On the other hand, Mt. Snow Ski area as a leading regional employer (260 full-time, 140 summer help, 1200 during ski season) reports difficulty in filling seasonal. service jobs and skilled labor (plumbing, carpentry) often looking to other regions to fill its labor needs.

IV. Quality of Life

Wages in Windham County are lower in Windham County than in Vermont as a whole. Local wages in the Dover-Wilmington Region are even lower. This is due to the high number of service jobs in the region. In 2004 the average retail and leisure/hospitality sector wages in Windham County were 28 percent and 48 percent less than the overall average wage for the county, respectively.

	Population	% Share of County	Annual Avg. Employment	Annual Avg. Wage	Homestead Education Tax Rate (2007)
Vermont	623,908		302,969	\$35,585	
Windham County	43,898	100%	22,636	\$33,949	
Dover	1,444	3.3%	1,132	\$22,520	\$1.13
Wilmington	2,343	5.3%	1,090	\$25,594	\$1.35
Whitingham	1,231	2.8%	197	\$26,639	\$1.36

The median sales price for both year-round and vacation homes continues to increase in Dover-Wilmington, but the number of annual sales has dropped. From 2000 to 2007, the median sales price rose from \$110,000 to \$197,000 (year round) and from \$131,000 to \$276,000 vacation/second homes. Still, Windham County in 2007 had the highest number of vacation homes sold in any county in Vermont. The number of year-round homes sold each year in Windham County is approximately the same as the number of vacation homes sold.

Services. A Vermont Conundrum doesn't seem to be a conundrum for the region's residents and second home owners. A consistent theme of the interviews held with town staff, residents and small businesses is the lack of larger services such as a grocery store, general merchandise, and construction materials. There is a recognized need for larger scale retail. Residents walking the aisles of Shaw's in Wilmington can be heard planning what they will get at Shaw's and what they will pick up at Hanniford's on their trips to Brattleboro. Similarly, clothes are

purchased at Wal-Mart in Hinsdale on planned trips. Contractors plan trips for materials to Home Depots in western Massachusetts. Many noted the success Rite-Aid was having as a new chain store in the area. Yet, when residents were then posed the question of locating a larger retail store in the area, they generally were opposed noting the potential change in the area's Vermont landscape. While it clearly increases the cost of living in the region, it appears to be an accepted part of life. The remaining question is: Does the lack of larger stores affect the overnight visitors to the region in their ability to purchase goods or find additional activity beyond a day's recreation?

What's Going On? Many have recognized that to draw visitors to spur the economy, there should be an increase in available activities in the region. Through the arts and recreation, the Chamber, individual business, and community volunteers are finding ways to expand the seasons in the region. Mt. Snow's summer event calendar lists numerous mountain bike events, a blues festival and craft show. Wilmington has downtown walks. There is a blueberry fest. Hotels and Inns are marketing to summer travelers including motorcycle tours and mountain bikers.

The report, *Advancing Vermont's Creative Economy*, notes that the arts economy will need incentives to grow. The Valley region has a strong base and draw for the creative economy with a growing number of events and activities, restaurants, and galleries. As noted in the Data Report, the region's population is aging. Creative communities stimulate growth and retention of young people. "Communities that want to build an economy based on the jobs of the future must cultivate a creative workforce", according to the report. To do this, Vermont and the region must (1) Support the growth of creative/cultural enterprises; (2) Promote the roles that creativity, culture and innovation play in the economy; (3) Invest in communities so they can build on their past while adapting for the future; and (4) Develop Vermont's creative Economy through community-based planning and improved collaboration. The Valley region, based on community activities and plans to date, seems poised and prepared to undertake these actions.

Education. Officials and business owners commented on the ability of the region's towns to improve the school facilities and system. Some noted that the quality of the school system can affect (positively for elementary schools, negatively for Twin Valley) whether employees will live in the region. Many noted that changes may be needed at the State of Vermont level regarding the distribution of Education Taxes in order to improve the school facilities. In order to support creative ideas and the arts as noted above, the region's schools must emphasize the teaching of creative skills.

V. Tourism, Non-Tourism and the Fiscal Climate

The Dover-Wilmington Region has attracted tourists for generations. Its location in Southeastern Vermont brings it within convenient range of travelers from large urban areas. The past decade has not seen a great increase of skiers and the industry is searching for new markets, such as the younger snowboarding generation. From 1991-1999, Mt. Snow captured approximately 13-14% of the Vermont Market Share of skiers. Since 2001, the percentage has been slowly declining. In 2009, Mt. Snow recorded 9.4% of the market share, a slight rebound from a low mark in 2006-2007.

Year	Total Vermont	Total Mt. Snow	Mt. Snow % of Vermont
1994-1995	4,109,109	461,270	12.6%
1999-2000	3,957,457	505,025	12.8%
2004-2005	4,399,273	523,698	11.9%
2009	4,000,000	425,158	9.4%

Businesses that have benefited from the growth related to tourism and recreation include the arts, entertainment, lodging, restaurants, gasoline stations, retail shops, outdoor equipment sales, construction and building materials, and maintenance and repair services (Windham Regional Plan). The April 2009 Vermont and Travel Indicators report shows that travel related businesses employ over 31,000 residents. The National Ski Areas Association Strategic Outlook notes that "Creativity is needed to develop compelling packages that incorporate additional goods and services that customers value". Packages of services and goods could be bundled with vacations to attract visitors.

A 2003 tourism study produced by the Vermont Department of Travel and Tourism revealed that:

1. Retail expenditure was the largest spending category for visitors (27 percent), followed by lodging (24 percent), food and restaurants (24 percent), and recreation (11 percent);
2. Major segments of leisure travelers visited historic sites and attended cultural activities (41 percent), took part in outdoor activities (22 percent), and bought maple syrup (37 percent); and
3. Two-thirds of overnight visitors came during the summer months of June through August. This last is particularly interesting to the Dover-Wilmington Region as it is the opposite of the ski-based Mt. Snow industry. It points to an opportunity for expanding tourism attractions to other seasons. Agriculture, recreation and heritage sites are attractions for tourists. There are numerous locations that provide these services. Many are publicized in the Chamber of Commerce and Welcome Centers. As noted in the Dover and Tri-Town Economic Development plans, marketing must be more aggressive to continue to attract visitors.

Some information gathered from reports shared by the Mt. Snow Ski Area:

1. The breakdown of revenue at the ski area is: Lodging 16%, Food and Beverage 10%, Ticket Sales 34%, Retail 8%, and Ski School 9%. The Kottke 2009 End of Season Survey, “Many resorts of all types and locations commented that ancillary revenues (ski school, food & beverage, retail, etc.) were negatively impacted due to more conservative skier spending patterns...”
2. Ski visitors are staying and skiing three days on average at Mt. Snow. The 3-4 day stay has become a target market for Mt. Snow.
3. While the number of season’s passes dropped across the Northeast, the number at Mt. Snow rose. Usage of season’s passes also increased.

Mount Snow and the Dover-Wilmington Region share economic interests. The goals of highlighting recreation, creating venues for arts, recreation and gathering, and the optimization of marketing efforts are held in common. Sharing resources to enhance the region as a destination will assist the overall economic climate.

VI. Zoning and Land Use

Dover and Wilmington have recently approved Town Plans and accompanying recommended land use regulatory amendments. The link between planning and land use regulation in Vermont is strong, but often challenging to implement because of the regular updating of plans. The Town Plans are consistent with the Windham Regional Plan, part of which is excerpted below regarding resort areas.

Resort Centers (from the Windham Regional Plan)

“Resort development is generally concentrated around ski area base facilities, and these built-up areas are recognized as resort centers. This includes Mount Snow and Haystack. Growth in the vicinity of these resort centers, which has been stimulated by resort development and expansion, is sometimes termed secondary development. Seasonal homes are perhaps the most discussed form of secondary development, but lodging and restaurants are also prevalent near the region's resort centers. Much of this secondary development has occurred in places having sewer systems, along major routes, and in and around historic village areas. The resort centers currently do not have specific boundaries that define their limits, and future efforts to better define these areas and plan for their development need to take into account the substantial changes that have occurred—and continue to occur—in the resort industry.

The resort centers are located in the region's uplands where soils are often shallow and slopes are steep. Many streams and rivers originate from these lands, and some are productive forestlands and valuable wildlife habitat. These conditions have been a guiding factor in resort center planning, development, and expansion. This Plan recognizes the need for orderly expansion of recreation facilities, commercial services, and housing in resort centers along with careful environmental management. Successful resort centers will provide year-round recreational activities for residents and visitors. The Plan considers commercial recreation to be a legitimate land use that should not depend on secondary housing development for its economic viability. High home prices could have

the effect of creating exclusive second home communities, thereby contributing to workers' inability to afford housing and needing to commute from farther away. To that end, there needs to be a balance of housing options to enhance the overall vitality of a resort community. Town and regional facilities must not be overburdened nor should natural resource protection be compromised by either primary or secondary development at resort centers. Resort centers deserve continuing and comprehensive planning attention by towns, resort managers, and the WRC working cooperatively together. It is appropriate that the results of this coordinated planning be incorporated in town and regional plans and be reflected in programs and decision making at all governmental levels. This planning should reflect and address the relationship between resort based areas, related recreation and facility developments, natural resources, transportation corridors, and historic village and settlement patterns." *It is suggested here in the State of the Region report that planning and communication around the Mt. Snow resort should also address desired economic growth, affordable housing, and labor requirements.*

Zoning in both Dover and Wilmington recognize development patterns beyond the resort and vacation homes in the communities. Development along Route 100, in town centers and outlying rural areas are addressed. The commercial and village districts could be reviewed for expanded area or depth from the streets. Districts that currently allow linear growth along main arteries could be altered to create more compact villages around intersections.

Regulation

Local zoning officials and businesses generally concurred the local permitting and review of economic and housing growth was reasonable in the amount of time for review. Vermont's land use laws, on the other hand, can present hurdles to regional growth, particularly for large scale developments such as Mt. Snow. The Summit on the Future of Vermont calls for a stakeholder review of land use planning in Vermont to suggest legislative changes.

APPENDIX B: DATA REPORT

I. Demographic Profile

A) Population

	Census 2000		ESRI 2009		ESRI 2014 (Projections)	
	<i>Dover</i>	<i>Wilmington</i>	<i>Dover</i>	<i>Wilmington</i>	<i>Dover</i>	<i>Wilmington</i>
<i>Population</i>	1,415	2,302	1,493	2,437	1,512	2,469
<i>Male</i>	51.8%	50.3%	51.8%	50.2%	52.3%	50.3%
<i>Female</i>	48.2%	49.7%	48.2%	49.8%	47.7%	49.7%
<i>Households</i>	613	1,025	679	1,132	697	1,160
<i>Families</i>	373	621	402	666	407	674
<i>Avg. Household Size</i>	2.31	2.24	2.20	2.14	2.17	2.12
<i>Median Age</i>	41.4	41.7	43.6	45.2	42.9	46.4

Source: U.S. Census 2000 and ESRI forecasts for 2009 and 2014

The towns of Dover and Vermont show modest increases in population projections from the year 2000 to the year 2014 (6.9% and 7.3% respectively). The increase in the projections of households is a bit higher (13.7% and 13.2%), while the average household size is expected to decline by 6% and 5.4% for Dover and Wilmington respectively. The median age for both towns is the early 40s and is expected to increase to the mid 40s by 2014. The population in both towns is predominantly white, with a small percentage being Asian. There is not much of a change being projected in the ethnic make-up of the population of both towns.

B) Race and Ethnicity (%)

	Census 2000		ESRI 2009		ESRI 2014 (Projections)	
	<i>Dover</i>	<i>Wilmington</i>	<i>Dover</i>	<i>Wilmington</i>	<i>Dover</i>	<i>Wilmington</i>
<i>White Alone</i>	97.7	97.8	96.9	97.3	96.3	97.1
<i>Black Alone</i>	0.1	0.2	0.1	0.3	0.1	0.3
<i>Asian Alone</i>	1.1	0.6	1.6	0.8	2.0	1.0
<i>Other Race Alone</i>	0.4	0.2	0.5	0.3	0.7	0.3
<i>Hispanic Origin</i>	1.2	0.9	1.5	1.1	1.9	1.3

Source: U.S. Census 2000 and ESRI forecasts for 2009 and 2014

II. Housing Profile

A) Housing

	Census 2000		ESRI 2009		ESRI 2014 (Projections)	
	<i>Dover</i>	<i>Wilmington</i>	<i>Dover</i>	<i>Wilmington</i>	<i>Dover</i>	<i>Wilmington</i>
<i>Total Housing Units</i>	2,778	2,300	3,063	2,586	3,084	2,623
<i>Occupied</i>	22.1%	44.6%	22.2%	43.8%	22.6%	44.2%
<i>Owner</i>	16.2%	30.7%	16.2%	30.3%	15.9%	30.3%
<i>Renter</i>	5.9%	13.9%	6.0%	13.5%	6.7%	14.0%
<i>Vacant</i>	77.9%	55.4	77.8%	56.2%	77.4%	55.8%
<i>Median Value</i>	\$143,077	\$119,679	\$268,750	\$232,031	\$306,875	\$265,726

Source: U.S. 2000 Census of Population and Housing; ESRI forecasts for 2009 and 2014

The towns of Dover and Wilmington have a high rate of vacant housing units for all years reported and projected. This unusually high rate of vacant units is mostly due to the fact that a large percentage of these units are kept as “Seasonal/Recreational/Occasional Use” units. Census 2000 data reported that Dover had 95.7% and Wilmington had 94.1% of its vacant units in this category.

Currently, the median home value in Dover is \$268,750 and in Wilmington it is \$232,031, compared to the median home value for the U.S. at \$162,279. Median monthly owner costs for units with mortgage in the year 2000 were \$1,065 in Dover and \$946 in Wilmington. The median rent for units in the same year was \$555 in Dover and \$487 in Wilmington. Census 2000 reported the median year a housing structure was built in Dover to be 1984, and in Wilmington it was 1973.

III. Educational Profile

A) Educational Attainment

	Census 2000		ESRI 2009	
	<i>Dover</i>	<i>Wilmington</i>	<i>Dover</i>	<i>Wilmington</i>
<i>No High School</i>	6.2%	9.6%	4.5%	7.2%
<i>High School Only</i>	23.7%	29.9%	22.8%	29.7%
<i>Associates Degree</i>	7.7%	8.0%	8.2%	8.7%
<i>Bachelor's Degree</i>	29.3%	19.4%	31.1%	21.1%
<i>Masters/Professional/Doctorate Degree</i>	12.2%	11.3%	13.8%	12.8%

Source: U.S. 2000 Census of Population and Housing; ESRI forecasts for 2009 and 2014

Both towns have a generally higher rate of educational attainment than the country as a whole. Dover does not have a high school within its boundaries, whereas Wilmington shares its middle and high school (Twin Valley Middle/High School) with Whitingham. The 2008 dropout rate for Twin Valley High School was 2.54%, compared to 2.3% for the state of Vermont as a whole.

IV. Economic Profile

A) Workforce and Labor

	2008 Annual		May 2009	
	<i>Dover</i>	<i>Wilmington</i>	<i>Dover</i>	<i>Wilmington</i>
<i>Labor Force</i>	930	1,430	980	1,480
<i>Unemployment Rate</i>	7.9%	6%	14.9%	11.7%

Source: Vermont Department of Labor: Economic & Labor Market Information

The towns of Dover and Wilmington have much higher unemployment rates than the state of Vermont (2008 Annual – 4.8%, May 2009 – 7.1%). The affect that the ongoing recession is having on the unemployment rates is evident in the rise in these percentages from May 2008 to May 2009. This is understandable as tourism and recreation suffer the most in such economic times and both these towns are primary rural resort towns that base their main economic activity on the state park and Mount Snow. Construction is another industry that has suffered during the current economic recession. It is also evident that this tourism industry is seasonal and peak months would be from December to April, which is when we see the lowest levels of unemployment rates (see table below).

Monthly Labor Force and Unemployment Rates

	Dover, VT		Wilmington, VT	
	<i>Labor Force</i>	<i>Unemployment Rate</i>	<i>Labor Force</i>	<i>Unemployment Rate</i>
<i>May 2009</i>	980	14.9%	1,480	11.7%
<i>April 2009</i>	970	14.4%	1,460	11.0%
<i>March 2009</i>	910	7.2%	1,410	5.9%
<i>February 2009</i>	910	6.7%	1,410	5.4%
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<i>December 2008</i>	910	6.5%	1,420	5.4%
<i>November 2008</i>	940	9.4%	1,440	7.1%
<i>October 2008</i>	910	6.5%	1,430	6.0%
<i>September 2008</i>	920	8.3%	1,420	6.3%
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<i>July 2008</i>	950	9%	1,450	6.2%
<i>June 2008</i>	970	11.1%	1,470	7.4%
<i>May 2008</i>	960	12.7%	1,460	9.0%
<i>April 2008</i>	930	8.4%	1,450	7.7%
<i>March 2008</i>	900	4.6%	1,410	4.4%
<i>February 2008</i>	900	4.3%	1,400	3.4%
<i>January 2008</i>	910	5.4%	1,410	3.9%

Source: Vermont Department of Labor: Economic & Labor Market Information

B) Employment and Wages (2008)

	Establishments (% of total)		Employment (% of total)		Average Wage	
	<i>Dover</i>	<i>Wilmington</i>	<i>Dover</i>	<i>Wilmington</i>	<i>Dover</i>	<i>Wilmington</i>
Natural Resources & Mining	-	0.6	-	-	-	-
Construction	16.5	16.7	-	5.5	-	\$33,248
Manufacturing	0.9	3.2	-	-	-	-
Trade, Trsp. & Util.	10.1	26.9	4.2	26.3	\$28,601	\$26,911
Information	1.8	2.6	-	1.5	-	\$42,064
Financial Activities	16.5	7.1	6.0	3.0	\$30,353	\$32,112
Prof & Bus Servs	12.8	10.9	2.8	4.4	\$32,237	\$38,802
Educ & Health Serv	4.6	5.1	-	9.1	-	\$26,728
Leisure & Hosp	25.7	16.7	70.2	20.0	\$19,251	\$22,065
Other Private	6.4	6.4	3.0	4.1	\$19,712	\$24,032
Public/Government	4.6	4.5	5.1	24.0	\$34,769	\$29,803

Source: Vermont Department of Labor: Economic & Labor Market Information

The town of Dover has the bulk of its employment in the Leisure and Hospitality sector, while Wilmington shares its majority employment between the three sectors of Trade, Transportation & Utilities, Leisure & Hospitality, and the Government/Public sector. Typical to the hospitality sector is the low wages, whereas Information, Financial activities, Professional and Business services, and the government sector have the highest wages.

C) **Income**

	2000		2009		2014	
	<i>Dover</i>	<i>Wilmington</i>	<i>Dover</i>	<i>Wilmington</i>	<i>Dover</i>	<i>Wilmington</i>
Per Capita Income	\$23,516-	\$24,721	\$31,820	\$29,682	\$33,366	\$31,608
Med Hshld Inc	\$43,776	\$37,331	\$58,944	\$46,334	\$60,269	\$48,304
Avg Hshld Inc	\$53,825	\$55,921	\$69,967	\$63,790	\$72,382	\$67,155
Med Fam Inc	\$49,666	\$46,898	\$64,823	\$59,600	\$66,006	\$61,043
Avg Fam Inc	\$60,380	\$67,977	\$76,744	\$72,668	\$78,344	\$74,985
% Below Poverty	7.9%	9.8%				

Source: U.S. Census 2000; ESRI forecasts for 2009 & 2014

The town of Dover has a higher Per Capita Income and Median Household and Family Income than Wilmington. Dover also had a lower percentage of households living below the poverty line in the year 2000. Projections show an increase in all incomes for both towns, however, the rate of increase is lower from the year 2009 to 2014 than it is from the year 2000 to 2009.

V. Expenditures and Spending Potential

The following sections show the spending potential of residents of Dover and Wilmington, compared to those of the surrounding area (Southern Vermont Region) and the larger surrounding area (see study area definitions in the Appendix), in different expense categories. The spending potential index represents the amount spent on a good/service compared to the national average of 100. Only those items in which either Dover or Wilmington have a spending potential equal to or higher than 110 have been included in the tables. For a more detailed profile, please refer to the Appendix.

A) **Automotive Aftermarket Expenditures**

	<i>Dover</i>	<i>Wilmington</i>	<i>Southern Vermont Region</i>	<i>Larger Region</i>
Products				
Vehicle Coolant/Brake/Transmission Fluids	112	116	92	87
Motor Oil	122	136	97	89
Vehicle Parts/Equipment/Accessories	110	113	90	85
Tire Purchase/Replacement	110	112	90	85
Services				
Vehicle Clutch/Transmission Repair	120	127	93	86
Vehicle Drive Shaft & Rear-end Repair	113	118	92	86

B) Financial Expenditures

	<i>Dover</i>	<i>Wilmington</i>	<i>Southern Vermont Region</i>	<i>Larger Region</i>
Assets				
Annual Changes to U.S. Savings Bonds	108	113	86	76
Liabilities				
Interest paid on Used Car/Truck/Van Loan	110	111	91	87
Principal paid on Used Car/Truck/Van Loan	111	114	93	88

C) House and Home Expenditures

	<i>Dover</i>	<i>Wilmington</i>	<i>Southern Vermont Region</i>	<i>Larger Region</i>
Owned Dwellings				
Ground Rent	118	126	94	86
Maintenance & Remodeling Materials	116	126	92	82
Household Operations				
Lawn & Garden	110	113	92	85
Moving/Storage/Freight Express	112	113	88	83
PC Repair (personal use)	110	111	90	86
Water Softening Services	123	149	107	95
Utilities, Fuels, Public Services				
Bottled Gas	178	247	127	101
Fuel Oil	114	129	101	92
Car/Wood/Other Fuel	204	294	140	108
Household Textiles				
Materials for Slipcovers/Curtains	112	115	93	87
Major Appliances				
Dishwashers & Disposals	115	122	93	85
Clothes Washers	110	111	91	84
Clothes Dryers	110	111	91	85
Window Air Conditioners	120	138	99	91
Electric Floor Cleaning Equipment	118	126	93	85
Sewing Machines & Miscellaneous Appliances	134	156	104	91
Household Items				
Hand Tools	110	112	90	85

D) Household Budget Expenditures

	<i>Dover</i>	<i>Wilmington</i>	<i>Southern Vermont Region</i>	<i>Larger Region</i>
Smoking Products	112	113	96	92

E) Medical Expenditures

	<i>Dover</i>	<i>Wilmington</i>	<i>Southern Vermont Region</i>	<i>Larger Region</i>
Medical Care				
Lab Tests, X-Rays	111	114	94	87
Non Prescription Drugs	120	130	96	88
Prescription Drugs	112	115	96	90
Medicare Prescription Drug Premium	119	131	104	97
Hearing Aids	139	165	110	97
Health Insurance				
Medicare Payments	115	122	101	94
Long Term care Insurance	112	112	96	90

F) Recreation Expenditures

	<i>Dover</i>	<i>Wilmington</i>	<i>Southern Vermont Region</i>	<i>Larger Region</i>
Recreational Vehicles and Fees	143	176	104	88
Purchase of RVs or Boats	155	197	109	90
Sports, Recreation and Exercise Equipment				
Hunting and Fishing Equipment	120	85	63	57
Winter Sports Equipment	119	132	89	79
Water Sports Equipment	110	130	96	87
Rental/Repair of Sports/Rec./Exercise Equip.	116	120	90	82
Photographic Equipment and Supplies				
Film	116	125	95	88
Film Processing	111	114	91	85

G) Retail Marketplace

- The table below shows a snapshot of the industry groups and whether the demands of residents of an area are being met with a sufficient supply within the area. Amounts in **red** would mean that the area has excess supply of the industry group and that it attracts customers/dollar sales from outside the area. Amounts in **green** would mean the opposite, that there is not enough supply and the residents have to travel out of the area to fulfill their demands. *For example, there is about \$4,013,000 worth of business demand in the Motor Vehicle Industry in Dover which is not being met, and the residents have to go beyond the Dover area for their needs.* For more details on the surplus/leakage factors, please see the report in the appendix.

Study Area using Zip Codes

Industry	Dover (\$,000s)	Wilmington (\$,000s)	Southern VT Region (\$,000s)	Larger Region (\$,000s)
<i>Motor Vehicle & Parts Dealers</i>	4,013	5,670	46,854	176,452
<i>Automobile Dealers</i>	3,566	5,746	37,481	157,309
<i>Other Motor Vehicle Dealers</i>	200	88	299	2,493
<i>Auto parts, accessories & tire stores</i>	247	164	9,074	16,650
<i>Furniture & Home furnishing stores</i>	1,819	34	2,075	10,106
<i>Furniture Stores</i>	1,874	563	1,491	2,160
<i>Home furnishing stores</i>	56	529	3,567	7,946
<i>Electronics & Appliance Stores</i>	475	926	10,101	3,163
<i>Bldg Materials, Garden Equip & Supply Store</i>	721	777	10,551	45,144
<i>Bldg material & supplies dealers</i>	638	1,001	11,713	47,031
<i>Lawn & garden equip & supplies stores</i>	83	225	1,161	1,888
<i>Food & Beverage Stores</i>	2,166	10,105	86,849	134,136
<i>Grocery Stores</i>	1,009	10,468	80,631	122,036
<i>Specialty Food Stores</i>	347	286	3,932	4,249
<i>Beer, Wine, & Liquor Stores</i>	809	76	2,286	7,851
<i>Health & Persona Care Stores</i>	940	348	168	10,026
<i>Gas Stations</i>	2,025	6,763	105,509	125,078
<i>Clothing and Accessory Stores</i>	850	1,222	11,034	12,008
<i>Clothing stores</i>	641	911	10,216	13,951
<i>Shoe Stores</i>	86	131	233	638
<i>Jewelry, luggage, leather goods stores</i>	123	180	1,051	1,305
<i>Sports goods, hobby, book & music stores</i>	1,032	213	3,426	9,836
<i>Sports goods, hobby, musical instruments</i>	1,137	1	2,669	6,173
<i>Book, periodical, & music stores</i>	106	212	758	3,663
<i>General Merchandise Stores</i>	5	2,005	18,944	6,533
<i>Department stores (excl. leased depts.)</i>	174	268	6,012	47,156
<i>Other General Merchandise stores</i>	179	1,737	24,956	40,623
<i>Miscellaneous Store Retailers</i>	324	1,972	10,384	13,497
<i>Florists</i>	43	517	629	1,661
<i>Office supplies, stationery, gift stores</i>	181	687	1,945	2,642
<i>Used merchandise stores</i>	43	70	898	1,238
<i>Other Misc store retailers</i>	56	697	6,912	7,956

<i>Nonstore Retailers</i>	3,054	546	4,419	1,604
<i>Electronic Shopping & mail-order houses</i>	0	0	0	1,218
<i>Vending machine operators</i>	3,306	66	2,740	4,519
<i>Direct selling establishments</i>	251	480	7,158	4,905
<i>Food services & drinking places</i>	908	1,027	4,998	35,135
<i>Full-Service restaurants</i>	1,373	1,754	1,189	6,725
<i>Limited service eating places</i>	258	99	10,758	48,863
<i>Special food services</i>	806	1,057	8,171	7,591
<i>Drinking places – alcoholic beverages</i>	600	231	1,222	588

- The table below shows a snapshot of the industry groups and whether the demands of residents of an area (defined by a central point of Rt 9 and Rt 100, and 3 rings of drive times drawn from the central point; first ring has a drive time of 10 mins, the second ring has a drive time of 30 mins and the third ring has a drive time of 60 mins) are being met with a sufficient supply within the area. Amounts in red would mean that the area has excess supply of the industry group and that it attracts customers/dollar sales from outside the area. Amounts in green would mean the opposite, that there is not enough supply and the residents have to travel out of the area to fulfill their demands. For more details on the surplus/leakage factors, please see the report in the appendix.

Study Area using Drive times to generate rings

<i>Industry</i>	<i>10 Mins (\$,000s)</i>	<i>30 Mins (\$,000s)</i>	<i>60 Mins (\$,000s)</i>
<i>Motor Vehicle & Parts Dealers</i>	4,644	9,416	166,270
<i>Automobile Dealers</i>	4,847	4,194	127,321
<i>Other Motor Vehicle Dealers</i>	21	1,379	24,140
<i>Auto parts, accessories & tire stores</i>	223	3,483	14,808
<i>Furniture & Home furnishing stores</i>	638	1,037	9,829
<i>Furniture Stores</i>	84	1,717	8,983
<i>Home furnishing stores</i>	554	680	846
<i>Electronics & Appliance Stores</i>	744	5,161	27,697
<i>Bldg Materials, Garden Equip & Supply Store</i>	736	77	32,464
<i>Bldg material & supplies dealers</i>	913	938	34,360
<i>Lawn & garden equip & supplies stores</i>	177	1,015	1,896
<i>Food & Beverage Stores</i>	12,124	59,044	122,866
<i>Grocery Stores</i>	11,946	56,755	103,553
<i>Specialty Food Stores</i>	43	1,255	7,127
<i>Beer, Wine, & Liquor Stores</i>	222	1,035	12,185
<i>Health & Persona Care Stores</i>	469	104	25,992
<i>Gas Stations</i>	6,927	52,181	174,877
<i>Clothing and Accessory Stores</i>	1,042	7,825	48,012
<i>Clothing stores</i>	777	7,125	45,486
<i>Shoe Stores</i>	111	869	2,024
<i>Jewelry, luggage, leather goods stores</i>	154	169	502
<i>Sports goods, hobby, book & music stores</i>	590	4,437	807
<i>Sports goods, hobby, musical instruments</i>	405	2,878	2,841
<i>Book, periodical, & music stores</i>	185	1,558	2,035
<i>General Merchandise Stores</i>	1,282	11,505	93,586

<i>Department stores (excl. leased depts.)</i>	228	1,532	27,491
<i>Other General Merchandise stores</i>	1,055	9,974	121,077
Miscellaneous Store Retailers	2,001	6,599	19,133
<i>Florists</i>	522	580	928
<i>Office supplies, stationery, gift stores</i>	703	1,337	5,671
<i>Used merchandise stores</i>	72	211	2,223
<i>Other Misc store retailers</i>	704	4,470	21,653
Nonstore Retailers	104	832	31,657
<i>Electronic Shopping & mail-order houses</i>	0	0	2,659
<i>Vending machine operators</i>	503	2,915	8,808
<i>Direct selling establishments</i>	398	3,747	25,508
Food services & drinking places	1,844	8,660	31,909
<i>Full-Service restaurants</i>	2,310	5,582	50,814
<i>Limited service eating places</i>	113	5,939	37,572
<i>Special food services</i>	893	4,524	17,943
<i>Drinking places – alcoholic beverages</i>	313	1,664	725

ESRI – Environmental Systems Research Institute

BAO – Business Analyst Online

Area Explanation (for reports created in ESRI BAO)

Town of Dover – Zip Codes included in this area are 05341 (East Dover) and 05356 (West Dover)

Town of Wilmington – Zip Code included in this area is 05363

Southern Vermont Region – Included Zip codes are 05201 (Bennington), 05257 (North Bennington), 05301 (Brattleboro), 05341 (East Dover), 05342 (Jacksonville), 05345 (Newfane), 05350 (Readsboro), 05351 (South Newfane), 05355 (Wardsboro), 05356 (West Dover), 05358 (West Halifax), 05360 (West Wardsboro), 05361 (Whitingham), 05362 (Williamsville), 05363 (Wilmington)

Larger Region – This area includes all the regions included in the “Southern Vermont Region” plus 01301 (Greenfield, MA), 03431 (Keene, NH), 03451 (Hinsdale, NH)

Map with Rings – Center point for the study area was taken at the intersection of Rt. 9 and Rt. 100. Rings were created around this center point using drive times of 10 minutes, 30 minutes, and 60 minutes.

ESRI Report Definitions

Source: U.S. Census Bureau, 2002 NAICS Definitions

Food & Beverage Stores (NAICS 445) – “Industries in the Food and Beverage Stores subsector usually retail food and beverages merchandise from fixed point-of-sale locations. Establishments in this subsector have special equipment (e.g., freezers, refrigerated display cases, refrigerators) for displaying food and beverage goods. They have staff trained in the processing of food products to guarantee the proper storage and sanitary conditions required by regulatory authority.”

Specialty Food Stores (NAICS 4452) – “This industry group comprises establishments primarily engaged in retailing specialized lines of food”. Includes Meat markets, Fish/Seafood Markets, Fruit & Vegetable Markets, Baked Goods stores, Confectionery & Nuts Stores.

Health & Personal Care Stores (NAICS 446) – “Industries in the Health and Personal Care Stores subsector retail health and personal care merchandise from fixed point-of-sale locations. Establishments in this subsector are characterized principally by the products they retail, and some health and personal care stores may have specialized staff trained in dealing with the products. Staff may include pharmacists, opticians, and other professionals engaged in retailing, advising customers, and/or fitting the product sold to the customer's needs.”

Gas Stations (NAICS 447) – “Industries in the Gasoline Stations subsector group establishments retailing automotive fuels (e.g., gasoline, diesel fuel, gasohol) and automotive oils and retailing these products in combination with convenience store items. These establishments have specialized equipment for the storage and dispensing of automotive fuels.”

Sports Goods, Hobby, Books and Music Stores (NAICS 451) – “Industries in the Sporting Goods, Hobby, Book, and Music Stores subsector are engaged in retailing and providing expertise on use of sporting equipment or other specific leisure activities, such as needlework and musical instruments. Book stores are also included in this subsector.”

General Merchandise Stores (NAICS 452) – “Industries in the General Merchandise Stores subsector retail new general merchandise from fixed point-of-sale locations. Establishments in this subsector are unique in that they have the equipment and staff capable of retailing a large variety of goods from a single location. This includes a variety of display equipment and staff trained to provide information on many lines of products.”

Department Stores (NAICS 4521) – “This industry comprises establishments known as department stores primarily engaged in retailing a wide range of the following new products with no one merchandise line predominating: apparel, furniture, appliances and home furnishings; and selected additional items, such as paint, hardware, toiletries, cosmetics, photographic equipment, jewelry, toys, and sporting goods. Merchandise lines are normally arranged in separate departments.”

Other General Merchandise Stores (NAICS 4529) – “This industry group comprises establishments primarily engaged in retailing new goods in general merchandise stores (except department stores).”

Miscellaneous Store Retailers (NAICS 453) – “Industries in the Miscellaneous Store Retailers subsector retail merchandise from fixed point-of-sale locations (except new or used motor vehicles and parts; new furniture and house furnishings; new appliances and electronic products; new building materials; and garden equipment and supplies; food and beverages; health and personal care goods; gasoline; new clothing and accessories; and new

sporting goods, hobby goods, books, and music). Establishments in this subsector include stores with unique characteristics like florists, used merchandise stores, and pet and pet supply stores as well as other store retailers.”

Florists (NAICS 4531) – “This industry comprises establishments known as florists primarily engaged in retailing cut flowers, floral arrangements, and potted plants purchased from others. These establishments usually prepare the arrangements they sell.”

Office Supplies, Stationery, and Gift Stores (NAICS 4532) – “This industry comprises establishments primarily engaged in one or more of the following: (1) retailing new stationery, school supplies, and office supplies; (2) selling a combination of new office equipment, furniture, and supplies; and (3) selling new office equipment, furniture, and supplies in combination with selling new computers. This industry also comprises establishments primarily engaged in retailing new gifts, novelty merchandise, souvenirs, greeting cards, seasonal and holiday decorations, and curios.”

Used Merchandise Stores (NAICS 4533) – “This industry comprises establishments primarily engaged in retailing used merchandise, antiques, and secondhand goods (except motor vehicles, such as automobiles, RVs, motorcycles, and boats; motor vehicle parts; tires; and mobile homes).”

Other Miscellaneous Store Retailers (NAICS 4539) – “This industry group comprises establishments primarily engaged in retailing new miscellaneous specialty store merchandise (except motor vehicle and parts dealers; furniture and home furnishings stores; consumer-type electronics and appliance stores; building material and garden equipment and supplies dealers; food and beverage stores; health and personal care stores; gasoline stations; clothing and clothing accessories stores; sporting goods, hobby, book, and music stores; general merchandise stores; florists; office supplies, stationery, and gift stores; and used merchandise stores).”

Nonstore Retailers (NAICS 454) – “Industries in the Nonstore Retailers subsector retail merchandise using methods, such as the broadcasting of infomercials, the broadcasting and publishing of direct-response advertising, the publishing of paper and electronic catalogs, door-to-door solicitation, in-home demonstration, selling from portable stalls and distribution through vending machines. Establishments in this subsector include mail-order houses, vending machine operators, home delivery sales, door-to-door sales, party plan sales, electronic shopping, and sales through portable stalls (e.g., street vendors, except food). Establishments engaged in the direct sale (i.e., nonstore) of products, such as home heating oil dealers and newspaper delivery are included in this subsector.”

Vending Machine Operators (NAICS 4542) – “This industry comprises establishments primarily engaged in retailing merchandise through vending machines that they service.”

Direct Selling Establishments (NAICS 4543) – “This industry group comprises establishments primarily engaged in nonstore retailing (except electronic, mail-order, or vending machine sales). These establishments typically go to the customers' location rather than the customer coming to them (e.g., door-to-door sales, home parties). Examples of establishments in this industry are home delivery newspaper routes; home delivery of heating oil, liquefied petroleum (LP) gas, and other fuels; locker meat provisioners; frozen food and freezer plan providers; coffee-break services providers; and bottled water or water softener services.”

Food Service & Drinking Places (NAICS 722) – “Industries in the Food Services and Drinking Places subsector prepare meals, snacks, and beverages to customer order for immediate on-premises and off-premises consumption. There is a wide range of establishments in these industries. Some provide food and drink only; while others provide various combinations of seating space, waiter/waitress services and incidental amenities, such as limited entertainment. The industries in the subsector are grouped based on the type and level of services provided. The industry groups are full-service restaurants; limited-service eating places; special food services, such as food service contractors, caterers, and mobile food services; and drinking places.

Food services and drink activities at hotels and motels; amusement parks, theaters, casinos, country clubs, and similar recreational facilities; and civic and social organizations are included in this subsector only if these services are provided by a separate establishment primarily engaged in providing food and beverage services.

Excluded from this subsector are establishments operating dinner cruises. These establishments are classified in Subsector 487, Scenic and Sightseeing Transportation because those establishments utilize transportation equipment to provide scenic recreational entertainment.”

APPENDIX C: REPORT OF THE VERMONT TOURISM INDUSTRY

During the year 2007, visitors made an estimated 14.3 million trips to the state for leisure, business, or personal travel, which represents a 7% increase in the figures from 2005. Visitor spending totaled \$1.6 billion (see breakdown in Table 1) and supported about 37,490 jobs (see breakdown in Table 2), in 2007. Windham County taxable meals receipts grew 7.4%, from \$64.4 million in 2005 to \$69.1 million in 2007. During the same period, Windham County had the largest drop in taxable room receipts of 34.6% from \$50.3 million in 2005 to \$32.9 million in 2007. A part of this drop has been attributed to unfavorable winter weather conditions that deter skiers from planning overnight trips to the ski resort areas.

Table 1: Visitor Spending by Activity

<i>Activity</i>	<i>% of total spending</i>
Food & Beverage	25.5%
Lodging	19.9%
Gasoline	19.1%
Groceries	13.3%
Shopping	11.7%
Amusement/Recreation	8.7%
Other transportation in VT	1.9%

Source: Economic and Policy Resources Inc.

Table 2: Jobs Supported by Visitor Spending

<i>Type of Job</i>	<i>Number of Jobs</i>
Direct Wage & Salary Jobs	19,704
Proprietors in the Industry	7,630
Indirect Wage & Salary Jobs	10,156

Source: Economic and Policy Resources Inc.

Domestic Visitors

Domestic travelers made up over half (57.8%) of all the visitors to the state of Vermont in 2007. The table below shows that there has been an overall increase of 11.7% in domestic person trips from the year 2005 to 2007. A large part of this increase is attributed to the increase in day trips of domestic tourists (52.7%). “Second Home” trips are attributed to those out-of-state residents going to vacation/second homes in Vermont that they own.

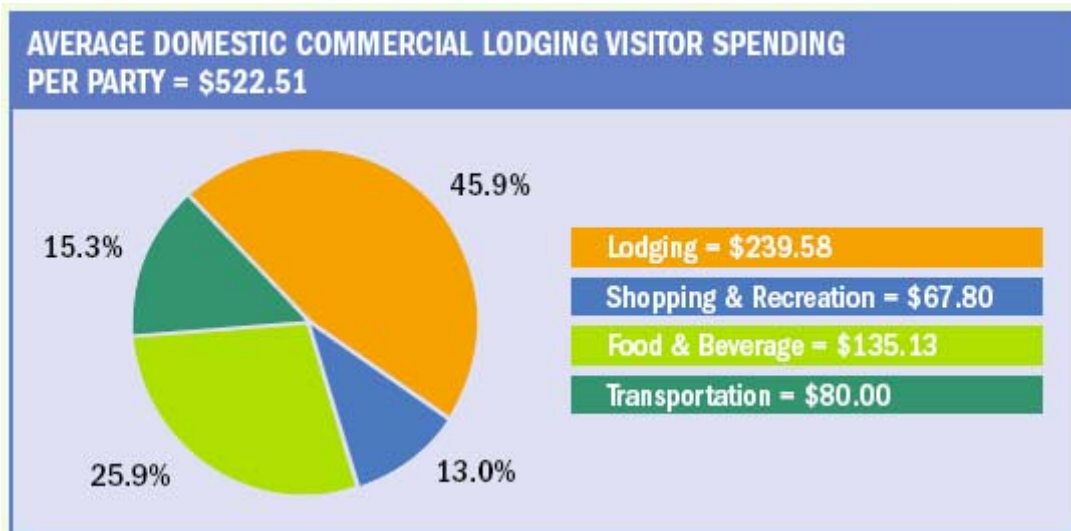
Table 3: Domestic Visitors by Trip Type

<i>Type of Person Trip</i>	<i>2007 (000s)</i>	<i>2005 (000s)</i>	<i>Nominal % Change</i>
Day Trips	1,567.5	1,026.7	52.7%
Overnight Trips	5,384.7	5,086.1	5.9%
Second Home Trips	1,340.9	1,310.6	2.3%
Total Domestic Trips	8,293.1	7,423.4	11.7%

Source: Economic & Policy Resources Inc

Other quick facts pertaining to this tourist segment are:

- 18.9% of total domestic trips in 2007 were day trips, compared to 13.9% in 2005.
- 70% of the domestic visitors in 2007 came from the New England and the Mid Atlantic states.
- Even though there was an increase in domestic visitors from 2005 to 2007, there was virtually no increase in their total overall spending.
- In 2007, domestic travelers on day trips spent on average \$67 per person per trip, while those on overnight trips spent \$157 per person per trip, and those going to their second homes spent \$302 per person per trip.
- There was a distinct increase in the party size of domestic visitors from 2005 to 2007 for all lodging types (staying with friends and family, or staying in a commercial lodging facility).
- The graphs shown below, taken from the “Benchmark Study of the Economic Impact of Visitor Expenditures on the Vermont Economy-2007”, depict the average domestic spending per party of those staying with friends and family, compared to those staying at commercial lodging facilities





Canadian Visitors

An important segment, the Canadian visitors made up about 20% of the total trips in 2007. This is an increase of 7.8% over the person trips made in 2005. Sharing a border with Canada and being within a two hour drive for many Canadian residents, Vermont is the beneficiary of many visitor trips originating in Canada. The table below shows that 72% of Canadian visitor trips were day trips in 2007.

Table 4: Canadian Visitors by Trip Type

Type of Person Trip	2007 (000s)	2005 (000s)	Nominal % Change
Day Trips	2,001.3	1,921.0	4.2%
Overnight Trips	765.9	644.0	18.9%
Total Domestic Trips	2,767.2	2,565	7.9%

Source: Economic & Policy Resources Inc

Some quick facts pertaining to this tourist segment:

- In 2007, Canadian visitors on day trips spent on average \$80 per person per trip, representing an increase of 22.3% from 2005 spending figures.
- In 2007, Canadian visitors on overnight trips spent on average \$193 per person per trip, representing an increase of 15% from 2005 spending figures.
- Length of stay increased modestly between 2005 and 2007 (from 2.7 to 2.9 nights).

In-State Visitors

Vermonters, making non-routine trips within the state made up about 23% of the total trips made in 2007. This represents a slight decline of 3.9% over the trips made in 2005. 70% of these trips were day trips, a decline of about 4.8% over those made in 2005 as shown in the table below.

Table 5: In-State Visitors by Trip Type

<i>Type of Person Trip</i>	<i>2007 (000s)</i>	<i>2005 (000s)</i>	<i>Nominal % Change</i>
Day Trips	2,318.9	2,435.6	-4.8%
Overnight Trips	574.4	569.1	0.9%
Second Home Trips	390.5	410.8	-4.9%
Total Domestic Trips	3,283.8	3,415.5	-3.9%

Source: Economic & Policy Resources Inc

Some quick facts pertaining to this tourist segment:

- A modest increase in the length of stay has been reported from 1.5 in nights in 2005 to 1.9 nights in 2007.
- In-state visitors on day trips spent \$60.20 per person per trip in 2007, representing a decrease of 9% over 2005 spending figures.
- In-state visitors on overnight trips spent \$124.78 per person per trip in 2007, representing a decrease of 9.6% over 2005 spending figures.
- On the other hand, in-state visitors going to their vacation/second homes spent \$72.86 per person per trip in 2007, representing an increase of 6.3% over 2005 spending figures.

Impacts of Visitor Activity

Compared to national averages, Vermont’s employment in industries related to hospitality and tourism varies largely with visitor spending, as shown in the table below. Transportation is the only industry where visitor spending does not make more of an impact in Vermont than in the U.S., and that is mainly because Vermont is not a hub for major transportation modes such as air and shipping.

Table 6: Share of Total Sector Jobs supported by Visitor Spending – U.S. vs. Vermont

<i>Sector</i>	<i>U.S. (Percent of total jobs in sector)</i>	<i>Vermont (Percent of total jobs in sector)</i>
Hotel and Lodging	74.0%	88.3%
Eating and Drinking	19.6%	32.3%
Transportation	33.5%	17.5%
Recreation and Entertainment	27.2%	35.3%
Gasoline and Oil	6.6%	22.0%
Retail and Related	2.5%	5.5%

Source: Economic & Policy Resources Inc

Visitor Profiling

Spending Patterns

According to a “Visitor Profiling Research” done for the Vermont Department of Tourism and Marketing in September 2007, visitors were divided into six groups namely, Sight-Seers, Historians, Water-Bugs, Relaxers, Skiers, and Athletics. Results from this study will be presented in the following sections with an emphasis on skiers (wherever possible) since this group of visitors would make up the majority of visitors in the Dover-Wilmington Area. The table below shows general characteristics and amounts spent per trip by these different visitor groups.

Table 7: Visitor Profile Groups and Spending Amounts

	<i>Sight-Seers</i>	<i>Historians</i>	<i>Water-Bugs</i>	<i>Relaxers</i>	<i>Skiers</i>	<i>Athletics</i>
Spending per person	\$524.13	\$519.78	\$568.97	\$414.04	\$419.07	\$573.43
Visited VT Once	45%	33%	23%	27%	9%	1%
Visited 5+ times/yr	14%	24%	30%	36%	61%	56%

Source: Portland Research Group, Visitor Profiling (2007)

Even though skiers spent lower during their trips, the frequency of their visits is much higher than the other groups. October was the most favored month to visit Vermont according to the study. 72% of respondents were traveling with another adult during their trips to Vermont. 44% of visitors had one child under the age of 18 traveling with them, while 34% of visitors had no children traveling with them. Focusing on skiers, 61% traveled in groups of two and 14% traveled in groups of five adults. 18% of skiers traveled without any children in their party, while 38% and

33% traveled with one and three or more children in their party respectively. The likelihood of returning to visit Vermont in the next 12 months ranged from a low of 53% for sight seers to a high of 86% for skiers.

Transportation & Lodging

75% of visitors used a private automobile to travel to Vermont. Skiers were most likely (94%) to use their car to travel to Vermont. The table below shows that skiers and athletics were more likely than the other groups to stay with friends and family during their visit to Vermont. Skiers were also most likely (70%) to stay up to 3 nights during their trip, compared to Water Bugs who were most likely (66%) to stay for 4 or more nights during their trip.

Table 8: Top Types of Lodging and Number of Nights Stayed

	<i>Sight-Seers</i>	<i>Historians</i>	<i>Water-Bugs</i>	<i>Relaxers</i>	<i>Skiers</i>	<i>Athletics</i>
Hotel/Motel	56%	54%	40%	51%	30%	33%
Bed & Breakfast/Inns	23%	34%	26%	25%	18%	24%
Friends & Family	7%	9%	12%	16%	26%	28%
Stayed up to 3 nights	46%	61%	34%	68%	70%	46%
Stayed 4+ nights	54%	39%	66%	32%	30%	54%

Source: Portland Research Group, Visitor Profiling (2007)

Outdoor Activities

Hiking and picnicking were the two main activities that were engaged in during visits. Skiers though, were the least likely to engage in these activities compared to other groups. 45% of visitors who engaged in outdoor activities, used a state park for their activities. Water Bugs were most likely to use state parks (68%), while skiers were least likely to use state parks (35%). Most visitors to state parks (95%) were likely to visit a state park again, citing Beauty/Scenery, Clean/Maintained, and Number of Activities as the top three reasons to do so. The Vermont State Park website was the primary source for learning about state parks in Vermont for most groups. For skiers, VermontVacation.com and referrals from friends and family played the major source for learning about state parks. About 78% of visitors who did not use a state park for their last visit, would consider using one for their next visit.

Table 9: Other Outdoor Activities

	<i>Sight-Seers</i>	<i>Historians</i>	<i>Water-Bugs</i>	<i>Relaxers</i>	<i>Skiers</i>	<i>Athletics</i>
Shopping	97%	93%	98%	92%	83%	98%
Viewing/Cultural/Learning	100%	100%	90%	53%	44%	90%
Trail/Street/Road	52%	44%	57%	36%	30%	53%
Sports	7%	9%	24%	11%	39%	39%
Winter/Snow	2%	2%	6%	5%	86%	75%
Water/Boating	18%	11%	71%	19%	18%	50%

Source: Portland Research Group, Visitor Profiling (2007)

In the shopping category, 95% of visitors bought locally produced food products. The top viewing/cultural/learning activity (72%) included visiting historical sites. Auto Touring was the most popular activity (75%) for those who

participated in Trail/Street/Road activities. The most popular Sports activity was running/jogging (41%). Alpine skiing was the most popular Winter/Snow activity (65%). The most popular water/Boating activity was swimming in lakes, streams, etc (57%).

References

Portland Research Group, Economic and Policy Resources, and the Vermont Department of Tourism and Marketing. (2007) Vermont Visitor Profiling Research.

Economic and Policy Resources, Inc. (2007) The Travel and Tourism Industry in Vermont: A Benchmark Study of the Economic Impact of Visitor Spending on the Vermont Economy-2007

Tourist Impact on Dover & Wilmington

No.	FROM TOURISM REPORT	Range	
1	Number of Visitors to Mount Snow (Range)	425,000	500,000
2	Amount Spent per person - (Tourism Report, Table 7)	419	419
3	Total Amount Spent	178,075,000	209,500,000
4	Spending by category - (Tourism Report, Table 1)		
5	Food & Beverage (25.5%)	45,409,125	53,422,500
6	Lodging (19.9%)	35,436,925	41,690,500
7	Gasoline (19.1%)	34,012,325	40,014,500
8	Groceries (13.3%)	23,683,975	27,863,500
9	Shopping (11.7%)	20,834,775	24,511,500
10	Amusement/Recreation (8.7%)	15,492,525	18,226,500
11	Other Transportation in VT (1.9%)	3,383,425	3,980,500

FROM DATA REPORT

Estimated Total Demand/Supply Scenario (Residents + Tourists)		10 min drive time area		30 min drive time area	
12	Food Services & Drinking Places				
	Resident Scenario - \$1,844,000 excess supply				
	Totally (Resident + Tourist demand)	43,565,125	51,578,500	36,749,125	44,762,500
13	Gas Stations				
	Resident Scenario - \$6,927,000 excess supply				
	Totally (Resident + Tourist demand)	27,085,325	33,087,500	18,168,675	12,166,500
14	Food & Beverage Stores				
	Resident Scenario - \$12,124,000 excess supply				
	Totally (Resident + Tourist demand)	11,559,975	15,739,500	35,360,025	31,180,500
15	Shopping				
	Resident Scenario - \$1,059,000 excess supply*				
	Totally (Resident + Tourist demand)	19,775,775	23,452,500	16,501,775	20,178,500

* Health & Personal Care + Sports goods, hobby, book & music stores

APPENDIX D: JOB DESCRIPTION -- PLANNER

Position

Economic Development Director

Duties

Acts as professional staff to the Economic Development Commission and provides expertise and assumes a proactive role in dealing with economic development issues.

Reports to

The Economic Development Commission

Primary Responsibilities

- Promotion of economic development that is consistent with the character of the Towns.
- Manage the day to day activities of the EDC and represent the Commission when necessary at meetings and other gatherings of the business community.
- Act as the principal liaison between the Towns, in particular the EDC, and senior management of Mount Snow and other local industries. Serve as the policy advisor to the EDC.
- Direct the activities of the EDC including but not limited to maintenance of records and financial accounts, meeting notices, agendas and minutes, correspondence, outreach, and day to day liaison activities with the Selectmen.
- Work with the Selectmen, Economic Development Commission, Town Administrators and other town agencies to implement the Economic Strategies Plan.
- Meet with businesses, particularly within SoVT, and encourage them to relocate or expand their business within the Valley.
- Maintain an up to date inventory of available land and building space available for commercial and/or industrial development; provide “matching” service for those businesses seeking land or building space and those property owners offering these resources.
- Develop and administer economic development grant proposals and work with banks to obtain CRA finds.
- Conduct town-wide surveys relative to economic development.
- Create and maintain an inventory of federal, state, and local financial assistance or other incentive programs available to assist businesses seeking to locate or expand in the Valley
- Provide assistance to businesses in applying for these programs.
- Perform other duties as required

Qualifications

Equivalent to a Master’s Degree in Economics, Business Administration, Planning or Public Administration.

Experience

At least five years of directly related experience. Supervisory experience preferable.

Required Knowledge and Abilities

- General knowledge and understanding of the real estate development process.
- Knowledge of the operation of business, local, state and federal government.
- Knowledge of community and real estate management and marketing
- Knowledge of urban planning principles
- Ability to communicate effectively, both orally and in writing
- Ability to work effectively with businesses, other employees, the general public and the media.
- Evidence of grant proposal writing and administration

Compensation and Benefits

The Towns will fund the Economic Development Director position for a period of three years at \$50,000 plus benefits per year. The Director is expected to raise a significant portion of his/her salary from grants, projects or other funding sources thereafter.

APPENDIX E: ORGANIZATIONAL STRUCTURES FOR ECONOMIC DEVELOPMENT

At this time the Economic Development Committee structure is both appropriate and adequate for Dover and Wilmington; it has political support and the necessary focus on local development opportunities. If desirable, it may join other commission to create a regional entity. However, in the short term two important elements are necessary: First, it must expand its technical capacity through the hiring of a professional economic development coordinator to carry out its work in a timely and professional way. Secondly, as projects begin to materialize, it needs to receive a designation from the Town as a designated development agency. This will permit it to work directly with state and federal agencies and funding sources. Both these actions are appropriate under its commission structure.

The “Selection Matrix” which follows reflects the general focus of various development structures, from “public” planning departments to “private” partnerships. The ability to respond quickly to opportunities were key elements of success, as well as strong municipal political support.

Selection Matrix

CRITERIA	Planning Department	Development Authority	E.D. Commission	Development Corporation	Partnership
Fits Strategy					
Planning	x				
Promotion		x	x	x	x
Financing		x		x	x
Infrastructure Development	x	x	x	x	
Eminent Domain		x			
Tax Incentives	x				
Land Assembly		x	x	x	x
Technical Assistance	x			x	
Geographic Scope					
Neighborhood	x	x	x	x	x
Municipal	x	x	x	x	x
Regional				x	x
Representation					
Government	x	x			
Public Sector Reps	x	x	x	x	
Private Owners					x
Residents	x	x	x	x	
Funding Sources					
Municipal	x	x	x	x	
State/Federal	x	x	x	x	x
Private				x	x

APPENDIX F: ECONOMIC DEVELOPMENT PROGRAMS DIRECTORY

Research on Federal Economic Development Programs

The following federal funding programs are designed to assist economic development in urban and suburban areas. Programs may be available to communities, state agencies, or other qualified economic development organizations. Several federal agencies were found that assist with economic development through a wide variety of programs.

Building, Construction, Infrastructure

Department of Commerce, Economic Development Administration, www.doc.gov/eda

The Public Works and Economic Development Program supports locally-developed projects that encourage long-term economic self-sufficiency and global competitiveness. Examples include water and sewer plants, industrial access roads, rail and port improvements, skill training facilities, technology infrastructure, as well as renovation and construction of publicly-owned buildings.

Housing and Urban Development, www.hud.gov

Community Development Block Grants, typically issued by HUD through the state governments or directly to entitlement communities, may be used for a large variety of construction or infrastructure projects provided. These grants must be used to reduce blighted conditions, or to create jobs for low and moderate income persons.

Department of Agriculture, www.usda.gov

The USDA offers Rural Development Grants for construction, infrastructure and public facilities. Though typically for rural areas, some small cities may qualify for some of the development programs.

US Department of Transportation, www.bywayonline.org/grants/

The National Scenic Byways Discretionary Grants program provides merit-based funding for byway-related projects each year. See <http://www.mapc.org/resources/battle-road-scenic-byway-road-revolutions>

Planning, Feasibility Studies

Environmental Protection Agency, www.epa.gov

Sustainable Development Challenge Grants aim to encourage communities to work with businesses and government to develop local approaches that link environmental quality management with sustainable development and revitalization.

Economic Development Administration, www.doc.gov/eda

Economic Adjustment Program assists state and local agencies design and implement strategies to bring about change to an economy. The program focuses on areas that have experienced or are under threat of serious damage to the underlying economic base. The Program supports three types of grant activities: strategic planning, project implementation, and revolving loan funds.

Partnership Planning Grants for Economic Development Districts. The EDA provides funding to partners to develop a local comprehensive planning process leading to the formulation and implementation of economic development strategies.

Local Technical Assistance Program. The EDA Program helps fill the information gaps that may prevent public and non-profit leaders from making optimal decisions on local economic development issues. The program has great flexibility to support a variety of activities.

Short Term Planning Grants to Urban Areas. EDA Planning Grants provide support for significant new economic development planning, policy making and implementation efforts, and to establish comprehensive economic development planning processes. The grants assist economic development planning such as analysis, goal definition, opportunity identification and the formulation and implementation of development programs.

Workforce Training

Department of Education, www.doe.gov

The Department of Education offers competitive grants programs for the training of workforces.

Department of Health & Human Services, www.acf.dhhs.gov/programs

Community Economic Development Funds offer flexible funding for community development targeting low income populations. These funds may be used for planning.

Business Assistance

Housing and Urban Development, www.hud.gov

Empowerment Zones and Enterprise Communities Initiative. Provides inner city residents and business with resources to effect change and create partnerships for economic development and neighborhood revitalization.

Community Development Block Grants may be used for business assistance including grants, loans, technical assistance programs, and physical improvements.

Small Business Administration, www.sba.gov/financing

The Small Business Administration has many loan and technical assistance programs specifically designed to assist businesses with issues ranging from training to pollution control. Assistance may include acquisition, management, expansion of facilities, and purchase of equipment. The SBA offers assistance to veterans and persons with disabilities.

USDA Rural Development, www.rurdev.usda.gov

Business and Industry (B&I) Guaranteed Loans. Loan guarantees are made to improve, develop or finance business, industry and employment in rural communities. This can include pollution control and abatement. The guarantee funds may be used for real estate purchase or improvement, equipment, or working capital.

Intermediary Relending Program Loans. Loans are made to finance business facilities and community development projects. Applicants may be public entities or not-for-profit corporations.

The Wholesale and Alternative Markets Program promotes regional economic development and improved market access for the small and medium sized farmer. Program activities include planning and design of facilities including Farmers' Markets. www.ams.usda.gov.

State Funding Programs

Vermont Agency of Transportation

<http://www.aot.state.vt.us/progdev/Sections/LTF/Enhancements%20Program/EnhancementsHomePage.htm>

Governor Douglas Announces \$2.75 Million in Community Enhancement Grants with Emphasis on Bike/Ped Projects.

Vermont Department of Housing and Community Affairs. <http://www.dhca.state.vt.us/Planning/MPG.htm>

Municipal Planning Grant (MPG) Program annually funds a range of projects to support municipal planning efforts including town plans and updates, bylaws, and other projects. Grants are only available to municipalities with a confirmed local planning process. Municipalities without a confirmed local planning process may apply for funding to do so.

Broadband

The Recovery Act appropriated \$7.2 billion and directed the Department of Agriculture's Rural Utilities Service (RUS) and The Department of Commerce's National Telecommunications Information Administration (NTIA) to expand broadband access to unserved and underserved communities across the U.S., increase jobs, spur investments in technology and infrastructure, and provide long-term economic benefits.

The federal website is www.broadbandusa.gov

The state government of Vermont also has a website dedicated to broadband and it is <http://recovery.vermont.gov/broadband>

Foundations

Orton Family Foundation. <http://www.orton.org/>

Much of the Foundation's work is carried out in partnership with communities, non-profit organizations, businesses and government agencies at all geographic scales. The Foundation periodically issues Requests for Proposals for new projects that fit our project priorities, or Requests for Qualifications for assistance with ongoing projects. Criteria for selection vary with each RFP.

Windham Foundation. <http://www.windham-foundation.org/>

The mission of the Windham Foundation of Grafton, Vermont is to promote the vitality of Grafton and Vermont's rural communities through its philanthropic and educational programs and its subsidiaries whose operations contribute to these endeavors. The philanthropic programs of the Windham Foundation are varied and we are proud to say that we have given millions of dollars that directly benefit Vermont and Vermonters.

Local Financing Initiatives

In terms of gaining support from the business community, the EDC should approach the owners/operators on a project by project basis. In the beginning, it would be best to request help for small projects (such as volunteer time for marketing the community, preparing marketing material) and when credibility is gained, to get increased support for a business improvements fund or a revolving loan program that would be administered by the EDC. The EDC should also explore innovative tax incentives to promote desired commercial and economic development in the Towns. These incentive tools include negotiated tax agreements and tax increment financing projects (TIFs).

Tax incentives and/ or abatements can be negotiated between the Town and a developer or property owner based on some type of linkage or reciprocal investment in the community. Tax abatement financing is attractive since it is virtually the only finance tool available at the sole discretion of local government. Tax abatements are given to businesses to offset property, sale, or inventory taxes. Abatements can reduce a developer/owner's tax bill, freeze the assessed value of a building and the land it will occupy, or freeze the total amount of taxes the owner must pay on its real property at the pre-development level. In all cases, abatements and credits reduce a business' cash outflow. For example, the Town could offer an investor a 80% credit in the first year. The credit line would then decline by 10 percentage points in each of the next 7 years. In the eighth year, the investor will be paying 100% of the taxes. The abatements over the eight year period would help the investor cover additional costs or risk factors and the Town would benefit in the long run by stimulating needed development.

Tax increment financing is a technique used to disperse the cost of development to those government agencies that will benefit from the increased tax base that a TIF project will generate. First a TIF area needs to be defined by the TIF authority (the EDC could act as the TIF authority if approved by Selectmen). The assessed property valuation of this area is frozen for a specific period of time (usually ranging from ten to twenty five years). This frozen value is referred to as the "tax increment base value", and it remains the same for the life of the project. The TIF authority then uses its powers of land assembly, sale, site clearance, infrastructure developments etc. to improve the district and make it more attractive to business and developers.

Once the land has been secured by the TIF authority, it is usually sold to a real estate developer, who is responsible for attracting business to the district. As private investment begins to accumulate, the assessed valuation and corresponding property taxes generated by the district increases. However, this increase is not channeled to the taxing body (the Town). Instead, this revenue is earmarked for the TIF authority and is used to finance any debt that the authority accumulated when making improvements to the district. The difference

between the “tax increment base value” and the assessed value after development is known as the “tax increment”.

There are two basic ways for the TIF authority to raise the initial monies needed to finance the infrastructure improvements. First, the authority can pay for improvements as they go, using the tax increment from the previous year. This method can be quite slow as development can occur only gradually. However, the authority does not need to issue bonds, thus reducing the risk of the project. The second financing method, which is more common, is the issuance of bonds (either general obligation bonds or revenue bonds). These bonds give the authority an immediate means of financing a TIF project. The issuance of bonds entails a higher risk. If development fails to occur or does not reach expected levels, it will be difficult to pay off the bond issues. Thus there is a trade off between the higher risk of using bonds and the increased speed of development.

Another local financing strategy is to create a local revolving loan fund or capital bank by forming a strong partnership with commercial banks in Town, private corporations and foundations and using public grants. The passage and subsequent utilization of the *Community Reinvestment Act* (CRA) requires banks to be players in “community development” within the communities in which they are located. They can contribute funds directly (make loans) or indirectly (make grants or loans to community development corporations or revolving loan programs that focus on community development) within their jurisdiction. Community development is defined as:

Activities that promote economic development by financing businesses or farms that meet the size eligibility standards of the Small Business Administration’s Development Company or Small Business Investment Company Programs or have gross annual revenues of \$1 million or less;

Community services targeted to low or moderate income individuals;

Activities that revitalize or stabilize low or moderate income geographies

There is no list of eligible activities or formal application criteria for CRA funds. As such this is a negotiation process between the Town, the EDC and the banks. The type and amount of assistance depends on the banks’ current CRA rating, actions the banks are taking at present, their assets, their available funds and, perhaps most importantly, their interest.

Transfer of Development Rights

What is TDR?

TDR is a voluntary and market-based land use tool used by communities to direct development away from rural, open space, and farm lands and towards areas most appropriate for growth.

The goal of the program is to have an exchange take place – extra development in acceptable growth areas in exchange for the preservation of lands a community wants to save– as a way to redirect development.

Under a TDR program landowners in an open space or agricultural district can **voluntarily** sever development rights from their property while retaining ownership of the land. They can then sell those rights to a developer in the form of **development credits** to be used on another parcel that the town has identified for growth. Common characteristics include:

- Preserves open space and agricultural lands without public expenditure.
- Encourages development in appropriate areas with existing infrastructure.
- Saves money by avoiding added infrastructure costs for development on greenfields and by maximizing the efficient use of existing infrastructure.
- Promotes mixed-use and compact development.
- Has the potential to create opportunities for affordable housing projects.
- Enables communities to guide development according to the vision of their comprehensive plan.

What is a development right?

Development rights can be easier to understand in the context of the property owner's bundle of rights. These rights are given and recognized by the government and are subject to limitations and restrictions, as well as to the police powers of taxation and eminent domain. Often compared to a bundle of sticks, they include water and mineral rights and the right to subdivide or develop the property. **The development right stick allows a landowner to develop their property according to existing zoning and land use regulations. Each of the rights, including the right to develop, can be separated from the bundle and leased or sold.**

How are the receiving and sending area properties identified?

TDR programs generally designate “**sending areas**”, from where rights can be sold, and “**receiving areas**”, to which development credits can be sent. The sending areas are lands that the community wishes to protect and can include agricultural districts, open space, land with rural character, critical habitat, and water resource areas. Receiving areas are town centers and land appropriate for development due to its proximity to infrastructure and public services.

Receiving Area

How can we be sure that the denser projects that TDR allows in receiving areas will fit with the surrounding district and with our community's overall character?

Many communities publish a set of design guidelines for projects utilizing TDR credits, ensuring that the receiving area will fit in with the surrounding land uses and structure and will reflect the goals of the community. Communities also often set density caps for receiving areas.

Are there any benefits for current property owners, residents and businesses in the receiving areas?

While there are no guaranteed benefits for current property owners, residents and businesses in the receiving area, successful TDR programs are often implemented as part of an overall strategy for revitalizing town and village centers as well as preserving farmlands and open space. Therefore, the town and village centers designated as receiving areas are frequently the subject of planning studies, design guidelines and municipal and state investments that benefit property owners and residents. Public investments, projects undertaken through the TDR program and design guidelines put in place for redevelopment often serve to revitalize an area and enhance the market value of existing buildings.

Sending Area

Is participation voluntary or mandatory?

The program is voluntary. Landowners in the sending area can elect to transfer their development rights. They can also choose not to participate.

What is the benefit of owning land in the sending area?

Landowners in the sending area have the opportunity to sell the rights to develop their land. In this way they can retain the open space or agricultural aspects of their property in perpetuity while being compensated for the market value of the development rights.

How is it determined how much development rights are worth?

A real estate analysis has been conducted to determine initial values. Once the program is up and running the real estate market will determine prices.

When development rights are sold, how are sending area properties constrained from future development?

Once landowners transfer their development rights they agree to put an easement (make *easement* a link to Land Trust Alliance <http://www.lta.org/conserv/option.htm>) on the property that restricts the land from development in perpetuity – this includes prohibition of subdivision and the construction of non-farm structures.