

Town of Danville, VT

Economic Analysis and Recommendations

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Prepared for:

The Town of Danville, Vermont



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About Camoin Associates

Camoin Associates has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin Associates has had the opportunity to serve EDOs and local and state governments from Maine to California; corporations and organizations that include Lowes Home Improvement, FedEx, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of \$6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to projects in 31 states and garnered attention from national media outlets including *Marketplace* (NPR), *Forbes* magazine, *The New York Times* and *The Wall Street Journal*. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. We are based in Saratoga Springs, NY, with regional offices in Portland, ME; Boston, MA; Richmond, VA and Brattleboro, VT. To learn more about our experience and projects in all of our service lines, please visit our website at www.camoinassociates.com. You can also find us on Twitter [@camoinassociate](https://twitter.com/camoinassociate) and on [Facebook](https://www.facebook.com/camoinassociates).

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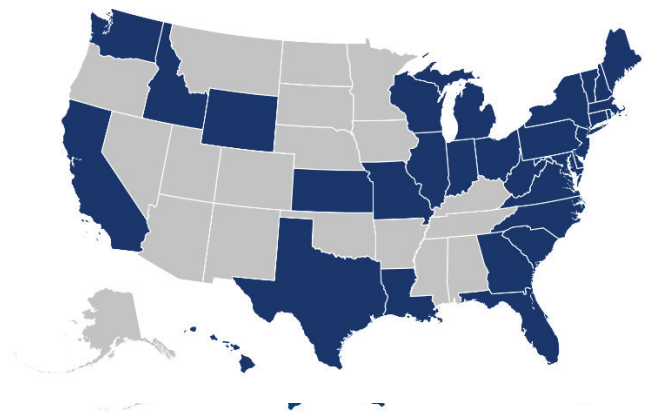


Table of Contents

| | |
|---|----|
| Introduction | 1 |
| Summary of Findings..... | 1 |
| General Economic Development Recommendations | 4 |
| Trail Specific Economic Development Recommendations | 6 |
| Attachment A: Economic Data Analysis..... | 12 |
| Demographic and Socioeconomic Profile | 13 |
| Industry Overview..... | 18 |
| Attachment B: Data Sources | 20 |
| Attachment C: Interviews | 21 |



Introduction

As a subconsultant to DuBois and King, Camoin Associates was commissioned to assist the Town of Danville, VT (the “Town”) with development of strategic economic development related recommendations, including both general economic development policy/programming to support existing businesses and a more focused look at the relationship between the Lamoille Valley Rail Trail users and business opportunities. This report was completed to inform the Town’s Village to Village plan; a greater strategic planning effort being undertaken by the Town to identify and connect the many assets of the town, including the Lamoille Valley Rail Trail (LVRT). This report is based on a review of basic economic data, informational interviews with key stakeholders within the town, Camoin’s extensive experience working with similar communities throughout the State of Vermont and the nation, and a review of case studies.

Summary of Findings

Current Situation

The following are some of the key findings of the data analysis, research, and interviews. These findings are helpful to set the stage for developing recommendations that fit the demographics and economic makeup of Danville.

Data Analysis

- **Population:** From 2010 to 2018, the Town of Danville showed population growth of 86 people or +4.6%, which is a higher percent jump compared to that of the county and state (1.5% and 2.8%)¹. Looking forward to 2023, the Town of Danville and Caledonia County are projected to decline in population by 0.2% and 1.0%. Declining/stable population may have an impact on the ability to support existing businesses without influx of visitors from the rail trail.
- **Households:** The Town of Danville showed growth in number of households from 2010 to 2018 (40 new households), followed by a steady out through 2023 (4.3% growth between 2010 and 2018 and .3% decline through 2023). The recent growth in households corresponds with a growth in the number of housing units in Danville.
- **Age Distribution:** Similar to the rest of Vermont and New England, the population in Danville is nearly a decade older than the median age for the United States (48.2 and 38.3). Older and aging populations require a certain set of goods and services and might impact the types of business and houses that are in demand. Many other communities are dealing with similar trending demographics that are impacting the workforce and ability to be competitive for new business investment.
- **Household Income:** The median household income for those in Danville is nearly \$60,000. This is higher than the surrounding county of Caledonia, the rest of Vermont and the United States. The Town of Danville has a significantly higher proportion of households within the \$75,000 to \$99,999 income cohort compared to the county, state, and nation. Higher than average income is a good signal for local establishments who may be able to serve the local residents who may be slightly less cost conscious.

¹ Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023 Esri converted Census 2000 data into 2010 geography.



- **Economy:** The largest industries in Danville are Government (including public schools) and Construction. A quarter of people who live in Danville commute to St. Johnsbury for work. The total number of jobs in Danville continues to decline.

Interview Themes:

A significant portion of the research conducted for this project involved discussions with individuals who live, work, or are familiar with Danville and the issues and challenges that exist. In a community as small as Danville, data can only tell a portion of the story and listening to what is going on “on the ground” is critical to identify true opportunities and solutions. The following is a summary of the major findings of the interview process.

- **Pride in Community:** An overwhelming theme through the interviews was the pride that people feel for Danville in its current form. The small town, village green, quintessential New England feel is something that people talked about in each of the interviews and are qualities that they do not want to change. The Farmer’s Market on the green, the community events, the rail trail, the library, the restaurants and cafes, are all aspects of life that they love. There were very little negative things that people had to say about living or working in Danville and little that people talked about wishing for or wanting when it came to additional types of goods or services in their community. It was clear from the interviews that residents do not envision Danville with a more developed downtown, but rather have a desire to see increased support for existing businesses.

Danville is recognized as a great place to live due to the rural development, proximity to the highway, central location to employment centers (for example, St. Johnsbury and Montpelier), mid-ranged housing prices, community feel, and recreational opportunities. The quality of life in Danville does increase demand for housing and it was noted that there is need for additional multi-family rental units.

Senior housing was identified as a need for the community, as it is throughout New England. The town has an older population than the rest of the region and state and as those residents want to (or have to) move out of their existing units it will be important to be able to have places for them to go within Danville if they would like that. The demand for assisted living, nursing homes, and continuing care facilities continues to grow. Services for older residents also becomes increasingly important as they have limited transportation options and have greater health care needs, however there are innovations occurring in the industry to be able to serve rural customers more easily, such as telehealth and mobile clinics.

- **Ease of Working with the Town:** Oftentimes the ability to work with a town on issues related to permitting, site review, or the development process can hinder projects and investment. However, in Danville it was made clear that the process of working with the Town is simple and straightforward. There were no issues noted related to ability to make capital improvements, add new signs for businesses, or make upgrades. There was limited mention of issues related to Act 250 at the state level, but interviewees were consistently positive about working with Town officials and different Town departments.
- **Recreation Industry:** Building on the recreation opportunities in Danville was identified as an opportunity by many of the interviewees. Certainly making use of the opportunities afforded by the rail trail (all seasons), but also outdoor events (races, festivals, etc.), water related recreation at Joe’s Pond (multi-season including boating, ice fishing, skating, etc.), outdoor outfitters, and off road biking options. Building the reputation of Danville as a great starting and ending place for all types of outdoor recreation will help drive business activity.

- **New Energy and Ideas:** While the data suggests that the population in Danville is older than the region and that the population is aging, it was interesting to hear in the interviews about new energy and residents that are moving to town. New events like movies in the park, the expanding brewery, and residents with skills related to website development, will help ensure that Danville remains an attractive place to live for all ages and families.

Broadband and cell service were two issues that came up related to the ability to attract and retain younger people and families to the area. Ensuring that residents and businesses have adequate service to work remotely and utilize their devices is important when trying to get people to live in a more rural community. Currently there are two primary providers for Danville. As of 2018, fiber optic broadband connection has not yet reached Caledonia County. The average download speed in Danville is 27.47 Mbps which is about 13% faster than the average for Vermont but nearly 50% slower than the national average. (Source: Broadbandnow.Com)

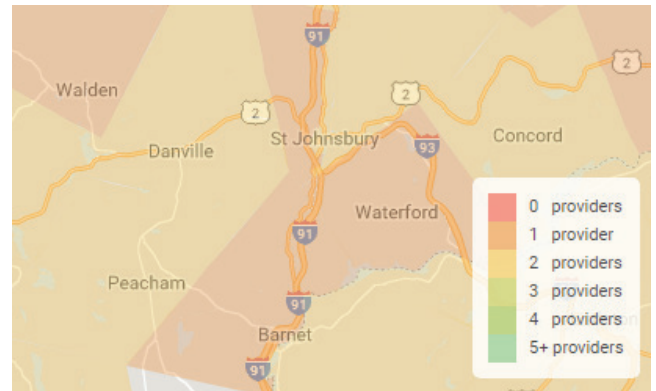


Figure 1: Number of broadband providers. Source: Broadbandnow.com

A number of residents who responded to a draft of this report indicated that the coverage numbers presented above are not accurately representative of broadband speeds or the availability of broadband. There is still a strong perception that coverage is inadequate town-wide and more should be done to encourage the expansion of broadband in Danville.

- **Safety, Signage, and Parking:** Issues related to safety and signage came up throughout the interviews both in terms of attracting people to town (signs on the LVRT but also on the roadway) and safety related to speed of traffic. Additionally, limited parking and lack of clarity on where to park was also identified as an issue for the downtown district as people may not know where they can park and then are less likely to come back to Danville. The work being completed through this grant is intended to help address some of these issues more specifically.
- **Train Depot:** The historic train depot was discussed as having the potential for more than just its current use as the recycling center. Opportunities related to establishing a visitor center with information about the area and different attractions was mentioned a few times as well as the opportunity for cheap or free co-working or incubator space. Many want the space to retain its historic character.
- **Business Support Programs:** The Northeastern Vermont Development Association (NVDA) has a robust suite of programs available to support businesses, including a revolving loan fund, industrial parks, and the ability to assist businesses with their use of statewide programs. They partner with the Small Business Development Center to offer training on topics such as marketing and website development. Participation by Danville businesses is limited.

Lamoille Valley Rail Trail

Danville is lucky to have easy access to the Lamoille Valley Rail Trail (LVRT), a crushed stone multi-use trail in northern Vermont. While the ultimate goal of those building the LVRT is to complete the longest trail in New England (at 93 miles) there are currently two sections in operation. One opened section starts in St. Johnsville, VT

and passes west through Danville, ending at Joe's Pond in West Danville. This 15.4-mile section was opened in 2015 and serves to accommodate year-round users including hikers, bicyclists, dog sledders, snowshoers, cross country skiers, horseback riders, and snowmobilers.

Residents and business owners recognize the positive impact that the Lamoille Valley Rail Trail has had on the town of Danville and the potential it has for greater impact. Business owners with locations right on the trail or near the trail heads report high levels of visitation during seasons/days when the use of the trail is greatest. Expanded facilities, signage, directions to the village center and other nearby destinations, and activity near the trail were all identified as potential ways to increase the amount of use of the trail and increase the business impact. Some interviewees talked about the need for a bigger attraction near the rail trail to make the Danville section more attractive, such as a restaurant or brewery². Nearby communities have had luck in attracting people who are doing brewery or beer tours by bike, so being able to connect into that trend in tourism would likely benefit Danville and any potential establishment owner.

A survey was conducted during the summer/fall of 2018 on users of the LVRT including questions related to spending habits and economic development. The following are some of the relevant findings of that survey, and information related to spending/economic development.

- During their visit to the LVRT, nearly 50% report visiting Joe's Pond but less than half visit the Danville or West Danville village or a business.
- The survey, which was mostly made up of those who primarily hike and bike on the LVRT, found that nearly 60% report spending no money on their last use of the LVRT. 30% report spending money on beverages, 15% report buying candy/snack food, another 12% report buying meals, and 11% report buying sandwiches.
- On average, those surveyed report spending approximately \$9.00 per person on an average visit to the LVRT.
- In terms of what types of amenities users would like to see on the trail, the following are some of the most common:
 - Stores
 - Food (healthy snacks, restaurants, café, coffee, water)
 - Bathrooms

The Lamoille Valley Rail Trail is expected to bring in about \$2 million per year from tourists once the trail is finished.*

** Stowetoday.com, New rail trail is already boosting the local economy, 7/7/16*

The relatively low amount of spending per person that is reported by survey takers suggests not many people are traveling distances to the LVRT and staying for long periods of time in the area. Other long distance trail systems generate higher spending per person, per day amounts because people will travel to visit and therefore have lodging, meal, transportation, and equipment expenses. The lack of services near the LVRT also limits the spending potential.

Additionally, the lack of spending estimates from snowmobile users (due to the timing of the survey) probably brought the average spending down as the snowmobile community tends to spend higher amounts.

General Economic Development Recommendations

Based on the information collected from the data analysis and the interviews, Camoin Associates has identified several general economic development programming recommendations that will help new and existing businesses

² It is noted that current sewer capacity would not be able to accommodate a full new brewery. It could be possible to partner with a brewer that produces elsewhere but as their retail and tasting facility in Danville. Other options that do not require onsite brewing would be a bar/restaurant with an extensive Vermont beer menu that would be attractive to a similar type of tourist. There are many different options that could have a similar impact but that would not put such a strain on the infrastructure.

in Danville. It should be noted that the items listed below should be pursued in conjunction with other partner organizations and entities in the region and not necessarily all in Danville's control. The items that are underlined have been identified as a priority action that can be completed relatively easily and in the short term and have a big impact.

Improve signs and wayfinding | The Town of Danville should focus on expanding signage and wayfinding tools throughout the community (including, but not limited to on the LVRT) to promote the businesses in town, the farmers market, parking options, and general community assets and destinations. Creating a more recognizable and flexible branding and wayfinding programming will help attract more people to come and stay in Danville and visit the various attractions. Ensuring that local businesses and local attractions are on the signs and that they are updated regularly will help direct visitors to the LVRT and Joe's Pond to the different destinations in town.

Review zoning and infrastructure to conform with community desires | Conduct a review of the zoning code to ensure that the economic and community development goals of the community are represented by the regulations. For example, if the town would like to see an outdoor recreation retailer and/or restaurant located near major recreation destinations and along the travel corridors then the zoning code should allow that type of development by-right and make it easy and predictable for the investors to complete the project. Allowances for outdoor seating, on-site production of value added food products, and other activities that would serve the business's ability to diversify should be easy to incorporate into site plans. Additionally, identify properties or areas in the community that would be appropriate for housing development and ensure that zoning regulations would make that possible. The demand exists for additional housing in the community, particularly multifamily rental housing, and bringing more people into the community will create additional economic activity and support for existing and new businesses.

Additionally, conduct a full review of the existing infrastructure and how it relates to the community's economic and community development needs. Consider the water/wastewater capacity, access to broadband, cell service, roads, and all other infrastructure to identify if there are certain barriers to the types of development desired. Create a capital improvement plan that aligns with the community's development goals and identifies potential funding sources such as Tax Increment Financing (TIF), state and federal funds, bonds, and public-private-partnerships.

Expand business and workforce support | While the NVDA does a great job offering programming, there does exist opportunity to expand networking and training opportunities for Danville businesses, both in terms of increasing awareness of what is offered as well as expanding the courses and trainings available. Working with local businesses to identify the types of business training that is needed and then identifying the right providers to offer training at convenient times for businesses will help existing and future businesses get the resources they need to be successful. These types of services will support businesses in all sectors of the economy and should be pursued regionally.

The typical business retention and expansion support service suite includes regular business visitation with major employers to identify and address any issues; provision of business planning and training related to various topics like human resources, online marketing, social media use, and accounting; workforce development assistance and recruitment support; and, assistance with accessing capital and funding different projects. Business retention and expansion programs are critical to ensure existing businesses are supported and able to remain viable.

In addition to support services for existing businesses, continuing to improve workforce development programs in coordination with industry will play an important role in the region. Partnering with educational providers such as Lyndon College and others in the region will help create the critical mass needed to create quality programming. The St. Johnsbury Academy Electrical Trade Program has been successful in training students and connecting them with employers, the region should work to grow those types of programs with educational providers in the area. Additionally, expanding programming related to work readiness, interview preparation, resume writing, and soft skills will prepare them for the work world and help employers find qualified applicants.

Coordinate business partnership opportunities | Developing and updating marketing materials that highlight the town's assets is a critical piece in attracting people to live in and visit Danville. Creating marketing material that can be placed in bed and breakfasts, at local retailers, and made available online which lists upcoming events, local establishments, and other town amenities would go a long way to creating a more cohesive Danville experience. Consider helping local establishments create systems that offer coupons or benefits to visiting more than one place and encourage sharing of resources and networks to create a longer visit and more attractive destination.

Enhance the quality of life, Vermont-image, and regional awareness | Look to increase the number of events in the community that bring people together, help support community spirit, engage new people in volunteer activities, and build the Vermont, small-town image. Events like food and drink festivals, craft festivals, and outdoor recreation events all build on the "Vermont" brand. Work regionally and statewide to identify how to attract a major event to host in Danville or cooperate with neighboring communities to co-host. Consider programming that builds off of the existing assets of the town of the LVRT, Joe's Pond, and regional trail systems.

Use the Town website to host a community calendar and cross-promote events and duplicate efforts on social media. Include regional residents in events to increase collaboration opportunities and increase awareness of what Danville has to offer, both for business and for residents. Look to increase awareness of Danville in the region through the development of a welcome center or information center at the old Train Depot; include information about events, local businesses, community history, and recreational assets.

Highlight and promote the brand of Danville as a classic Vermont town with modern events that complement the high quality of life aspects of a tightknit community, access to recreational resources, and the ability to be able to work from home and enjoy all the perks. Consider an "I am Danville" type promotion (print and digital media) that highlights different residents and why they live and like living in Danville.

Access to and expansion of the LVRT will also be a critical factor when people of all ages consider locating in Danville. While not called out specifically in the interviews, in general there is more and more research that highlights the benefit of trail access on property values and desirability.

Pursue development that is attractive to young people | With an aging population it will be critical to make sure that their needs to are being met, while also continuing to attract and retain young professionals and families. When reviewing potential development or policy decisions, consider the impact this will have on young people. Look to attract businesses like breweries, restaurants, outdoor recreation services, and other types of industries that align with the image and goals of Danville but that would also make it attractive as a place to live for someone looking to settle and make roots. Additionally, consider encouraging a wider variety of housing options, including multifamily and more senior housing options to make it feasible for people to move to the area or stay in the area after they need to move out of their larger home.

Trail Specific Economic Development Recommendations

More and more, people are looking towards recreational trails as a way to spend time with friends and family, travel, vacation, and/or exercise. Trail users are local and from out-of-town; they are fitness enthusiasts and weekend warriors; and they travel for the day or the week (and sometimes longer for long distance trail trips). Trail development in proximity to an area provides an opportunity for increased economic activity.

The purpose of this section is to show how trail development, particularly the development of the Lamoille Valley Rail Trail and the attraction of more users, can support the current businesses that exist throughout Danville through increasing economic activity. By supporting existing businesses, it strengthens their ability to provide for Danville through products and services offered, places to gather, and support (monetary and in-kind) to other efforts within Danville. In all, creating more viable businesses create a stronger community.

Ultimately, these efforts and recommendations aim to strengthen the interdependent small-town web between local government, nonprofits and educational institutions, businesses, and community members. While tourists come to visit, Danville residents live here year-round. The question then is: *How can trail access help support the kind of community Danville residents want?*

Danville is a small, rural town with limited resources (time, people, money) to implement a lot of big initiatives. The recommendations provided below are crafted given this context and where possible, we provide specific, doable actions that can help draw economic opportunity. The “return on investment” for each recommendation should be examined by asking: *What actions will have the most impact?* and, *Are there partnerships that will make it easier to get this done?* If possible, to show impact, consider creating a “before” and “after” snapshot. By measuring steps taken, even anecdotally, it will help clarify how effective each action is and determine whether additional resources should be committed in the future.

Case studies featured below (in the blue boxes) were chosen based on their size, ability to scale and replicate efforts in Danville, and level of completeness. In addition to the case studies, we reviewed other guidance documents that have been prepared to help communities maximize trails for economic development to identify strategies that align with Danville’s size, capacity, and infrastructure.

Internal Education & Outreach | Make sure to increase awareness of people in Danville about the trail, the soon-to-be extent of the trail, and what trail users might be looking for. By having business owners think like trail users, they can more readily provide unique services and products. This education push involves knowing what you have and understanding what trail users seek. Specific actions include:

- Set up an information booth at the farmer’s market or other events that happen in the town. Or simply walk around the market, hand out fliers, and talk to people.
- Use existing information channels (social media accounts, Chamber of Commerce, local paper, newsletters, bulletin boards, online sources, etc.) to communicate about the trail and its users.

External Promotion | Continue to promote the Lamoille Valley Rail Trail as a destination for trail tourists, especially as the trail continues to be extended. Utilize social media campaigns to target people who are within driving distance and interested in outdoor recreation. Focus on creating the image of Danville and the LVRT as an all-season weekend destination.

84.2% of Great Allegheny Passage riders found out about business or attractions on social media or online. The trail’s site has more than 1.5 million views a year.*

* 2017 Trail Town Guide



Continue to work to develop the necessary amenities that make a town a desirable start or ending place for a trail trip. Types of establishments that are typically successful at attracting trail users include: outdoor outfitters and rental shops, breweries or local beer distributor, restaurants, and specialty stores for Vermont made products. Work to expand the number of people using the trail through adequate parking, signage, events, and amenities so that the impact of the trail on Danville will continue to increase. For Danville to see economic growth related to the LVRT it is critical that the awareness of Danville be raised as a trail town that has amenities, resources, and entertainment for all types of users.

Access to the Town | At present, direct access to the town is not clear. Trail users need to travel along busy and dangerous roads to access the town. While this may be a longer-term project, start by identifying where along the LVRT users can get on and off the trail to access town resources. There is potential to use Peacham Road to get into town from the rail trail, but road infrastructure investment would be needed.

Consider creating a “side-tour map” which will allow trail users to explore the countryside of Danville. A map and identified route gives trail users more confidence to venture, as it provides guidance on the best route. Work with nearby towns to create destinations and share the cost of map creation. Ultimately, the goal is to provide a clear and safe way trail users can access and leave the town. Without access to the town and the existing businesses it will be difficult to draw trail users to Danville, so this recommendation is a priority.

Web and Social Media Presence | Out-of-towners almost exclusively look on-line (both websites and social media) as they investigate new areas to explore. Because the LVRT is relatively new, and not yet complete, it will only continue to gain traction. Specific actions include:

GREAT ALLEGHENY PASSAGE | CUMBERLAND, MD TO PITTSBURG, PA

About | The Great Allegheny Passage (GAP) offers a 150-mile trail to hikers, bikers, snowshoers, and cross-country skiers. It has helpful information to plan your visit, both online, in a smartphone app, and available by hardcopy. Each town the trail passes through is described, offering information on and things to do and services provided in each. (<https://gaptrail.org/>)

Impact | To measure economic impact of GAP, multiple studies have been completed. To date, trail use has generated 270 new jobs in 8 years, 65 new businesses, and an \$124 average daily spend by each overnight visitor. These types of metrics are crucial when looking for grant funding or building support for the trail.

Take-a-Ways | The robust website GAP maintains offers everything a potential trail user is looking for, including an interactive trail map, trail alerts, and guide to trail services. Danville residents can learn about different amenities and the regional influence a trail can have. While the LVRT is not yet complete, organizers should look to GAP’s content and layout to understand what is most important to include in online materials, how to describe the trail assets to locals and visitors, and how to coordinate website with social media and in -person promotion.



Signage provides an entry point into a trail town along the GAP. Business names are located on a map to indicate services offered.

- Build off what other organizations have already done, including VAST
- Have businesses link to the LVRT website and post about in social media.
- Post via the LVRT Facebook and Instagram page about specific Danville activities.
- Promote additional businesses and information in Danville directly on the LVRT website and social media pages.

Signage & Wayfinding | Signage is necessary to directing people where you want (and don't want) them to go. If there aren't signs, people may pass by town completely. Signage should be consistent and provide details like the name of your town, the direction and distance to the area or specific locations, trail rules and if possible, a map with business locations. A simple bulletin board can offer a place for businesses to advertise specials directly to trail users. Include in signage the types of businesses that are available, how far to travel, and any trail- user specific amenities that will be there when they get there (bathroom, bike rack, gasoline, etc.). Focus on highlighting the aspects of the community that are particularly welcoming and accommodating.

Trail User Amenities | Once a trail user turns off the trail and heads to town, offer them a reason to stay – a destination. When you are traveling by trail for hours on end, you get thirsty, hungry, cold (or hot), need to find a bathroom, and a place to sit. In meeting these needs, you need safe places to store or park your bike, sled, horse, or skis. Safe storage provides a sense of comfort for trail users, and they will be less likely to leave as a result. Providing parking in eyesight of an establishment is ideal. In addition to parking, provide places to rest, such as benches or picnic tables. Improved bathroom access, garbage's, and facilities, will also make Danville a more likely starting, stopping, or ending point for trail users.

Current overnight accommodations in Danville are limited to a B&B and an RV/Campground. There are also a dozen or so homes or rooms listed on the AirBnB site as available for short term rentals. As Danville develops an improved perception as a good place to start a rail trail trip and as the full trail gets developed there will be need for additional overnight accommodations. Building out the reputation, assets, and amenities for tourists will need to come before a hotel or other accommodations will likely be financial viable. Reviewing policies and regulations related to home/room sharing (like AirBnB) and making sure they are in line with community goals would be the first step in promoting increased year round tourism. Creating guidelines, best practices, and support for those hoping to rent their space on these types of platforms could help generate more frequent and impactful visitation.

How Things Look | Identify eyesores around town (or perceived eyesores to trail users) and think about what easy fix can be done to create a more inviting atmosphere. A row of sunflowers or native perennials, a garbage pick-up day, and a fresh coat of paint can go a long way to show community care. Trail users are more apt to visit a town that looks inviting.

THE VIRGINIA CREEPER TRAIL, VA

About | This 34-mile year-round trail opened in 1987 and serves rural communities and their visitors. The trail has access to amenities like bike rentals, shuttles, dining, and lodging, and is known for its picturesque scenery.

Impact | Over 250,000 people enjoy this trail every year. One trail town, Damascus (pop. ~800), reaps huge benefits. Several restaurants have opened, and a total of seven businesses shuttle trail users. It is estimated tourists spend \$450,000-500,000 annually, and as of July of 2018 the town is debt free.*

Take-a-Ways | State-wide, Virginia offers a “Trails Toolbox” that provides many ideas for small town trail development and maintenance. This trail also has engaged students to conduct trail user surveys, created an annual clean-up day, and provided basic trail and business information on a static webpage.

* <https://www.100daysinappalachia.com/2018/07/07/if-we-build-it-the-tourism-economy-in-s-w-virginia/>



This business along the Virginia Creeper Trail offers bike parking and picnic tables to allow for a rest.

Business Services | To increase customer satisfaction, the Town should provide businesses with some guidance about the type of services desired by trail users. This list of services is adapted from the 2017 Trail Town Guide:

- Be knowledgeable about the region, be ready to provide recommendations, and invite them back.
- Offer bike parking or special equipment storage.
- Keep basic tools on-hand in case the need arises for a trail user.
- Know peak travel times and set hours that accommodate for trail users. Post hours in plain sight.
- Sell small snack items that are easy for trail users to carry and that accommodate to various dietary preferences or needs.
- Keep a guestbook and send out promos to encourage another visit.
- Seek feedback from customers and ask what they are looking for.
- Offer trail users a ride to lodging accommodations.
- Ship goods to entice trail users to make a larger purchase. Highlight and promote this option on all marketing materials.
- Create discounted packages or other promotional discounts for trail users that combine the services and goods of multiple Danville businesses.

Future Forward | While this 15.4-mile section presents an opportunity for day trips, once the entire 93-mile LVRT is complete it will offer many more economic opportunities with people looking to complete the entire trail. They will need a variety of lodging opportunities and may want to investigate other happenings like an annual Danville event or recreate at Joe's Pond. Know that whatever efforts are taken in the short term will pay-off as more riders will be

using the trail in the long term. Also, continue to pursue and advocate for future development in a way that will benefit Danville.

Other Marketing Ideas |

- Build off branding and promotional efforts already underway by LVRT to prevent duplicating efforts. Ensure the LVRT is creating a type of protocol for trail town businesses, which may include: providing amenities to trail users, being friendly and helpful in accessing resources, sharing knowledge of the trail and the area, and providing ideas on what to do along the trail. Connect branding efforts to social media promotions and information dissemination.
- Create a coordinated and professional campaign to spread the word both online (social media and website) and in person (signage, pamphlets, maps) regarding events, trail happenings, user amenities (local and regional businesses), and other information that will create awareness and comfort with the LVRT for local and regional users. Provide social media training to existing businesses and those who participate in any type of communication about the LVRT.
- Create an on-trail event, as they are allowed on the LVRT. The Town of Jefferson has had an annual Bike-A-Thon event for the past couple years and Danville could consider a similar event such as a race or fundraiser. Combine with town events that already draw a large crowd, such as the Autumn on the Green event.
- Consider marketing efforts focused in St. J, as the trail from St. J and back again is perfect for day or afternoon ride. Riders can stop in Danville for a drink or a bite and continue back, or vice versa. Push marketing campaigns to those who live, work, or visit St. J through Facebook, traditional news media, and signage.
- Install public art. It can reflect your town's local flavor and entice passers-by to pull into town to explore. Consider an art event on the Village Green that reflects use of the LVRT, artistic designs on the bike racks to make them stand out more, unique wayfinding tools, and installing pieces both in town and along the LVRT so that people who want to see the entire exhibit would be drawn to explore.
- Think about trail use as an extension of events already happening in Danville such as the Danville Farmer's Market, Autumn on the Green, Danville Fair, and the Great Vermont Corn Maze. Consider if the LVRT and Joes Pond can be included into the events through side venues, musical performances, races, or other events that draw people from the primary event to see the other assets and recreational opportunities and stay in the community longer.

Attachment A: Economic Data Analysis

Geographies Studied

The market analysis considers several different geographical areas to compare local and regional trends, as well as to align with the available data sources. The following geographies were considered:

Town of Danville

The Town of Danville is interested in understanding the demographic and socioeconomic trends in their small community. Therefore, the town is the primary study geography in this market analysis. The Zip Codes covering the town, Danville (05828) and West Danville (05873), were used when examining industry data.

Caledonia County

The Town of Danville is located within Caledonia County. The county is used as a primary geography to provide local context.

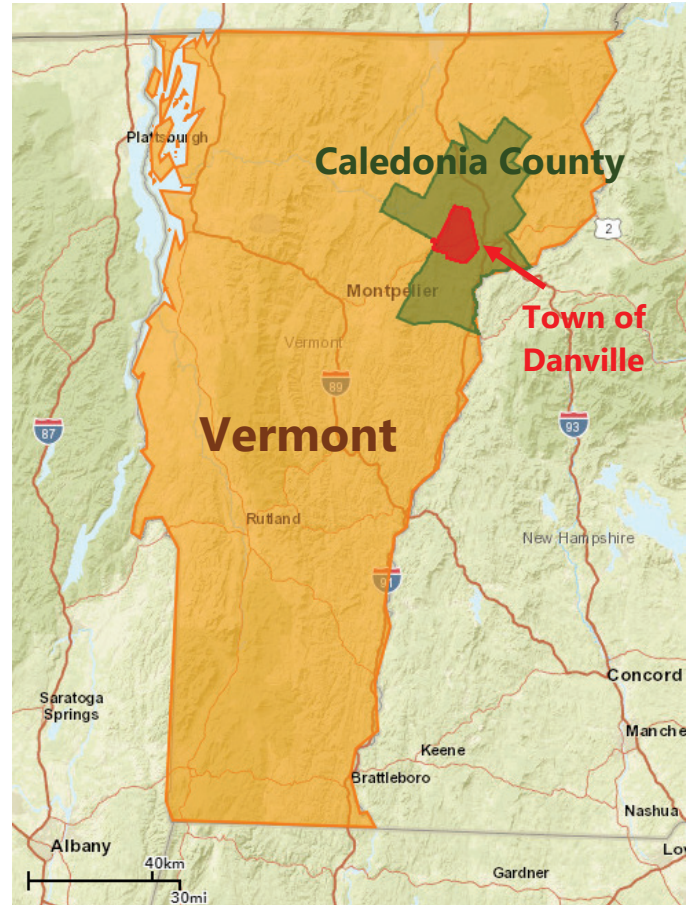
State of Vermont

State data was utilized to offer greater insight into the economy surrounding the town and county.

United States

National data was collected to offer trends for comparison.

Figure 2: Map of Study Areas



Demographic and Socioeconomic Profile

To inform the strategic recommendations outlined above, Camoin Associates completed a basic analysis of the demographic and socioeconomic situation within the Town of Danville, Vermont and surrounding Caledonia County. This data was compared to the State of Vermont and the United States for greater regional context. It is important to note that Danville is on the border with Washington County (home Montpelier) and close to New Hampshire and therefore there are other factors at play.

Population

Table 1 below displays the historic and projected population trends for the four comparison geographies. From 2010 to 2018, the Town of Danville showed significant population growth at 4.6% compared to that of the county and state (1.5% and 2.8%). Population growth was the strongest at the national level with a 6.9% expansion.

Looking forward to 2023, growth rates across all geographies is expected to decline. The Town of Danville and Caledonia County are projected to decline in population by 0.2% and 1.0%. In contrast, the state and nation are projected to grow 1.2% and 4.2% respectively.

Table 1: Population, 2010 - 2023

| Population, 2010 - 2023 | | | | | |
|-------------------------|-------------|-------------|-------------|-------------------------|-------------------------|
| | 2010 | 2018 | 2023 | % Change 2010 - 2018 | % Change 2018 - 2023 |
| Town of Danville | 2,196 | 2,297 | 2,293 | 4.6% | (0.2%) |
| Caledonia County | 31,227 | 31,707 | 31,405 | 1.5% | (1.0%) |
| Vermont | 625,741 | 643,518 | 651,536 | 2.8% | 1.2% |
| United States | 308,745,538 | 330,088,686 | 343,954,683 | 6.9% | 4.2% |

Source: Esri

Households

Historic and projected trends for number of households follow population trends across the geographies. The Town of Danville showed significant growth in number of households from 2010 to 2018, followed by a decline into 2023. Caledonia County is projected to decline in the number of households into 2023, at a slightly greater rate than the town at 1.2% compared to 0.3%. Household growth is strongest at the national level for both 2010 to 2018 and 2018 to 2023.

Table 2: Number of Households, 2010 - 2023

| Number of Households, 2010 - 2023 | | | | | |
|-----------------------------------|-------------|-------------|-------------|-------------------------|-------------------------|
| | 2010 | 2018 | 2023 | % Change 2010 - 2018 | % Change 2018 - 2023 |
| Town of Danville | 928 | 968 | 965 | 4.3% | (0.3%) |
| Caledonia County | 12,553 | 12,718 | 12,569 | 1.3% | (1.2%) |
| Vermont | 256,442 | 265,086 | 268,976 | 3.4% | 1.5% |
| United States | 116,716,292 | 124,110,001 | 129,076,036 | 6.3% | 4.0% |

Source: Esri

Age Distribution

The Town of Danville has the highest median age of all geographies at 48.2 years for 2018. This is nearly a decade older than the median age for the United States. The Town of Danville’s median age is projected to continue to grow by 3.3% to 49.8 by 2023. This growth outpaces the median age growth in the county, state, and nation, which all have growth rates of 1.8%, indicating that the Town of Danville’s population is aging at a faster rate.

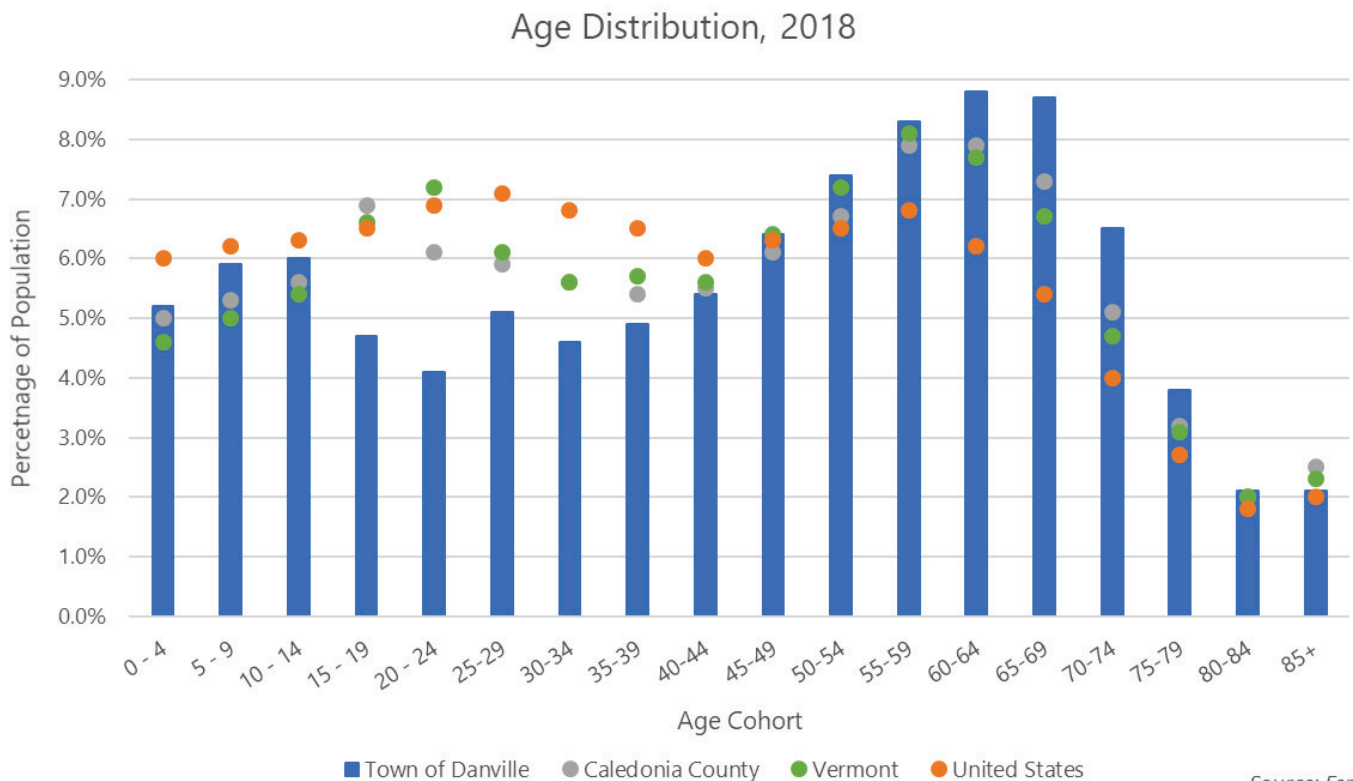
Table 3: Median Age, 2010 - 2023

| Median Age, 2010 - 2023 | | | | | |
|-------------------------|------|------|------|----------------------|----------------------|
| | 2010 | 2018 | 2023 | % Change 2010 - 2018 | % Change 2018 - 2023 |
| Town of Danville | 46.0 | 48.2 | 49.8 | 4.8% | 3.3% |
| Caledonia County | 42.0 | 43.9 | 44.7 | 4.5% | 1.8% |
| Vermont | 41.5 | 43.3 | 44.1 | 4.3% | 1.8% |
| United States | 37.1 | 38.3 | 39.0 | 3.2% | 1.8% |

Source: Esri

Figure 2 below displays the age distribution of the Town of Danville to that of Caledonia County, Vermont, and the United States. The Town of Danville has a significantly smaller proportion of individuals aged 15 to 39 compared to the county, state, and nation. Similarly, the Town of Danville has a significantly higher proportion of individuals across all cohorts aged 50 to 84 compared to the other geographies.

Figure 3: Age Distribution, 2018



Household Income

As of 2018, the Town of Danville has the highest median household income of all study geographies at approximately \$60,000. Median household incomes are the lowest for the surrounding county at approximately \$47,000. Looking forward to 2023, the median household income for the Town of Danville is projected to grow at a rate of 6.7%. The state and country are projected to see more rapid growth than the town, at 8.5% and 13.1% respectively.

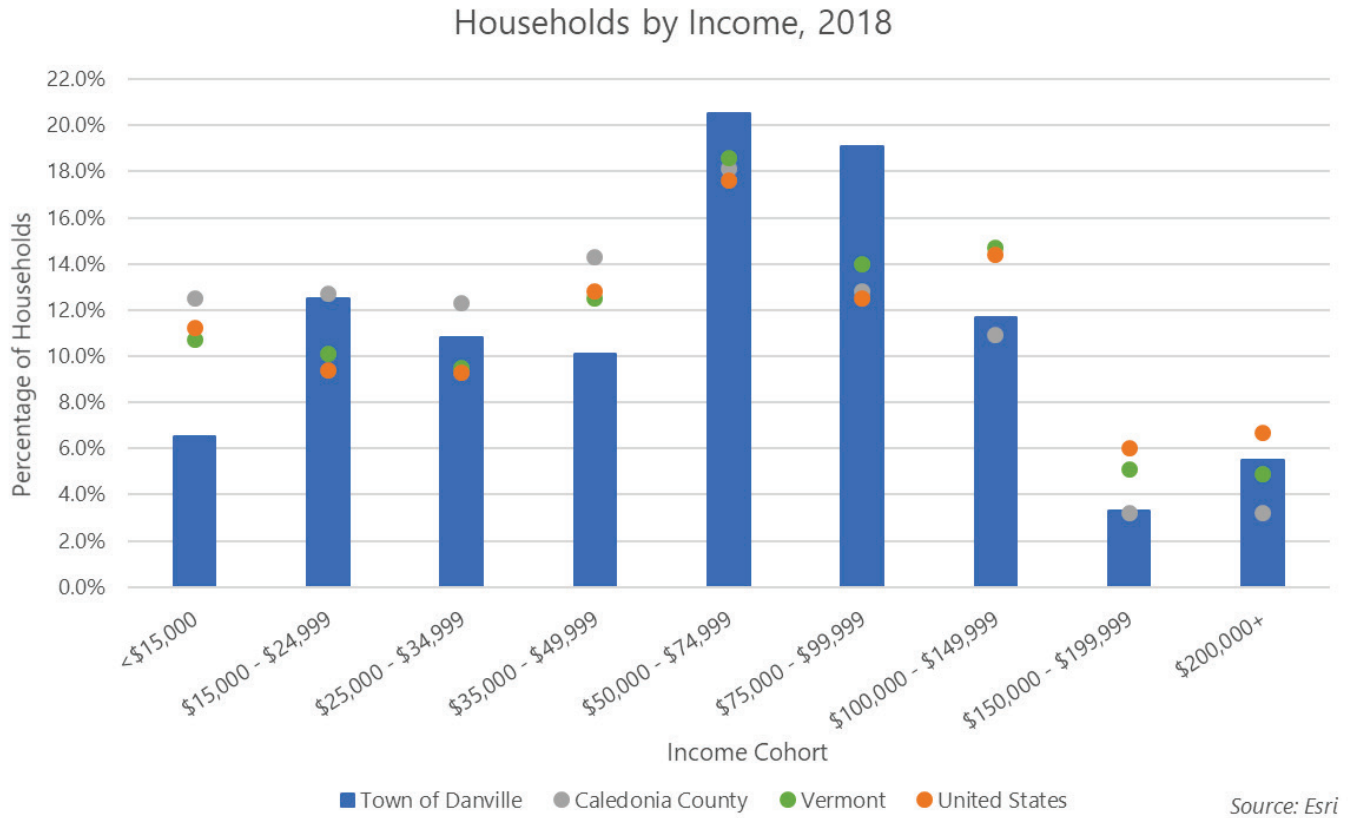
Table 4: Median Household Income, 2018 - 2023

| Median Household Income, 2018 - 2023 | | | |
|--------------------------------------|-----------|-----------|-------------------------|
| | 2018 | 2023 | % Change 2018 - 2023 |
| Town of Danville | \$ 59,725 | \$ 63,723 | 6.7% |
| Caledonia County | \$ 47,469 | \$ 50,576 | 6.5% |
| Vermont | \$ 57,396 | \$ 62,280 | 8.5% |
| United States | \$ 58,100 | \$ 65,727 | 13.1% |

Source: Esri

Figure 3 displays household income distribution for the town, county, state, and nation. All four geographies are most concentrated in the \$50,000 to \$74,999 household income range. The Town of Danville has a significantly lower concentration of households in the less than \$15,000 income cohorts, contributing to the higher median household income. Additionally, the town lags in proportion of households within the \$35,000 to \$49,999 income cohort. The Town of Danville has a significantly higher proportion of households within the \$75,000 to \$99,999 income cohort compared to the county, state, and nation.

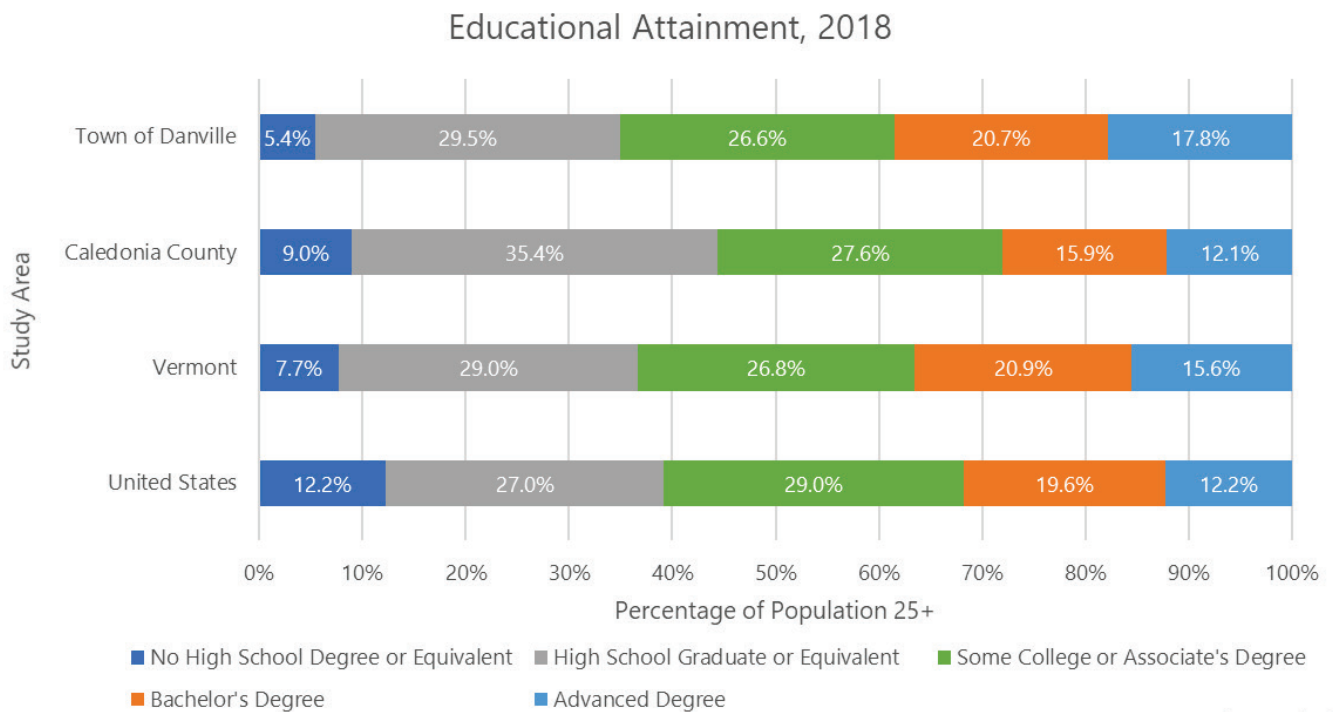
Figure 4: Households by Income, 2018



Educational Attainment

Figure 4 below compares education attainment figures for the four study areas. The Town of Danville has a relatively highly educated community compared to the county, state, and nation. Within the town there is a high presence of individuals with advanced degrees at 17.8%, compared to 12.1% in the county, 15.6% in the state, and 12.2% in the nation.

Figure 5: Educational Attainment, 2018



Source: Esri

Industry Overview

The Industry Overview provides insight on the economic situation in the Town of Danville in the context of the county, state, and nation. Industry data is sourced from Economic Modeling Specialists, International (EMSI). Data at the town level is shown for the Danville (05828) and West Danville (05873) Zip Code area.

Table 5 below outlines historical and projected job growth across the comparison geographies. The Town of Danville has experienced significant job loss of 7.1% over the past five years and is projected to continue declining by 1.5% by 2023. The county experienced job decline over the past five years, but at a slower rate than the town at 3.5%. Conversely, during that time Vermont and the United States experienced historic growths and are projected to continue expanding.

The town demonstrates the lowest average earnings per job in 2018, at approximately \$39,000. This falls \$8,000 below the county, \$16,000 below the state, and a staggering \$26,000 below the national average.

Table 5: Employment Growth, 2013 - 2023

| Employment Growth, 2013 - 2023 | | | | | | |
|--------------------------------|-------------|-------------|-------------|----------------------|----------------------|---------------------------------|
| | 2013 Jobs | 2018 Jobs | 2023 Jobs | 2013 - 2018 % Change | 2018 - 2023 % Change | Average Earnings Per Job (2018) |
| Town of Danville | 941 | 874 | 861 | (7.1%) | (1.5%) | \$ 38,532 |
| Caledonia County | 13,227 | 12,765 | 12,851 | (3.5%) | 0.7% | \$ 46,514 |
| Vermont | 352,375 | 362,029 | 370,261 | 2.7% | 2.3% | \$ 54,192 |
| United States | 150,497,974 | 163,694,294 | 172,004,305 | 8.8% | 5.1% | \$ 64,161 |

Source: EMSI

The following table summarizes the types of jobs that can be found in the Town of Danville by 2-digit North American Industrial Classification System code (NAICS). Government (including public school) and Construction are the largest industries in Danville accounting for more than half of all the jobs.

Table 6: Jobs in Danville by 2-digit NAICS

| Jobs in Danville by 2-digit NAICS | | |
|-----------------------------------|--|-----------|
| NAICS | Description | 2018 Jobs |
| 11 | Agriculture, Forestry, Fishing and Hunting | 27 |
| 21 | Mining, Quarrying, and Oil and Gas Extraction | 0 |
| 22 | Utilities | 0 |
| 23 | Construction | 139 |
| 31 | Manufacturing | 0 |
| 42 | Wholesale Trade | 0 |
| 44 | Retail Trade | 63 |
| 48 | Transportation and Warehousing | <10 |
| 51 | Information | 22 |
| 52 | Finance and Insurance | 23 |
| 53 | Real Estate and Rental and Leasing | <10 |
| 54 | Professional, Scientific, and Technical Services | 36 |
| 55 | Management of Companies and Enterprises | 0 |
| 56 | Administrative and Support and Waste Management and Remediation Services | 22 |
| 61 | Educational Services | 0 |
| 62 | Health Care and Social Assistance | 49 |
| 71 | Arts, Entertainment, and Recreation | <10 |
| 72 | Accommodation and Food Services | 87 |
| 81 | Other Services (except Public Administration) | 24 |
| 90 | Government | 372 |
| 99 | Unclassified Industry | 0 |

Source: EMSI

The data below shows that a quarter of the people who live in Danville and work are traveling to St. Johnsbury.

Table 7: Where do people who live in Danville work?

| Where do people who live in Danville work? | |
|--|-------|
| Location | Share |
| St. Johnsbury CDP, VT | 25.7% |
| Danville CDP, VT | 7.4% |
| Lyndonville village, VT | 3.4% |
| Burlington city, VT | 2.2% |
| Montpelier city, VT | 2.2% |
| Barre city, VT | 1.6% |
| Plainfield CDP, VT | 1.6% |
| Quechee CDP, VT | 1.5% |
| Hardwick CDP, VT | 1.4% |
| Newport city, VT | 1.3% |
| All Other Locations | 51.5% |

Source: U.S. Census, On the Map

Attachment B: Data Sources

Proprietary Data Sources

Economic Modeling Specialists International (EMSI)

To analyze the industrial makeup of a study area, industry data organized by the North American Industrial Classification System (NAICS) is assessed. Camoin Associates subscribes to Economic Modeling Specialists Intl. (EMSI), a proprietary data provider that aggregates economic data from approximately 90 sources. EMSI industry data, in our experience, is more complete than most or perhaps all local data sources (for more information on EMSI, please see www.economicmodeling.com). This is because local data sources typically miss significant employment counts by industry because data on sole proprietorships and contractual employment (i.e. 1099 contractor positions) is not included and because certain employment counts are suppressed from BLS/BEA figures for confidentiality reasons when too few establishments exist within a single NAICS code.

Esri Business Analyst Online (BAO)

ESRI is the leading provider of location-driven market insights. It combines demographic, lifestyle, and spending data with map-based analytics to provide market intelligence for strategic decision-making. ESRI uses proprietary statistical models and data from the U.S. Census Bureau, the U.S. Postal Service, and various other sources to present current conditions and project future trends. Esri data are used by developers to maximize their portfolio, retailers to understand growth opportunities, and by economic developers to attract business that fit their community. For more information, visit www.esri.com.

Public Data Sources

American Community Survey (ACS), U.S. Census

The American Community Survey (ACS) is an ongoing statistical survey by the U.S. Census Bureau that gathers demographic and socioeconomic information on age, sex, race, family and relationships, income and benefits, health insurance, education, veteran status, disabilities, commute patterns, and other topics. The survey is mandatory to fill out, but the survey is only sent to a small sample of the population on a rotating basis. The survey is crucial to major planning decisions, like vital services and infrastructure investments, made by municipalities and cities. The questions on the ACS are different than those asked on the decennial census and provide ongoing demographic updates of the nation down to the block group level. For more information on the ACS, visit <http://www.census.gov/programs-surveys/acs/>

Attachment C: Interviews

We would like to thank all of our interview participants and community stakeholders for devoting time to assisting the Camoin Team in the completion of this Project. We gained valuable first-hand knowledge and important suggestions from these interviews that enhanced the outcome of our final product.

Eric Bach
Anna Clark
Elizabeth Everts
Brad Fontaine
Molly Gleason
Jane Kitchel

Justin Lavelly
Peter McAlleny
Libby Ratico
David Snedeker
Deb Stresing
Lori Webster



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