



MAD RIVER VALLEY

PLANNING DISTRICT

Fayston • Waitsfield • Warren



2018 ANNUAL DATA REPORT

MRV TOWN LEADERSHIP MEETING 11/29/18

MRV VISION STATEMENT

DECEMBER 2015

The Mad River Valley is an innovative, vibrant, connected and caring community honoring its past, celebrating its landscape and actively pursuing its potential.

Our vision is to...

- Be a welcoming community that builds a **healthy and sustainable environment**.
- Support the **historic settlement pattern** of vibrant villages surrounded by rural countryside.
- Identify and promote the Valley's **historic and cultural heritage**.
- Promote and maintain a **diverse economy** that supports existing businesses and attracts new ones.
- Enhance the Valley's year round **recreational opportunities**.
- Invest in a safe, environmentally friendly, efficient, and integrated **transportation network**.
- Provide access to safe, affordable and energy efficient **housing** for current and prospective residents.
- Steward and sustainably use the Valley's natural resources and **environmental quality** for the benefit of future generations.

Developed through an extensive public process

Says who our community is and what we want our community to become

VISION -> DATA THEMES

I. Community

II. Economy

III. Housing

IV. Transportation

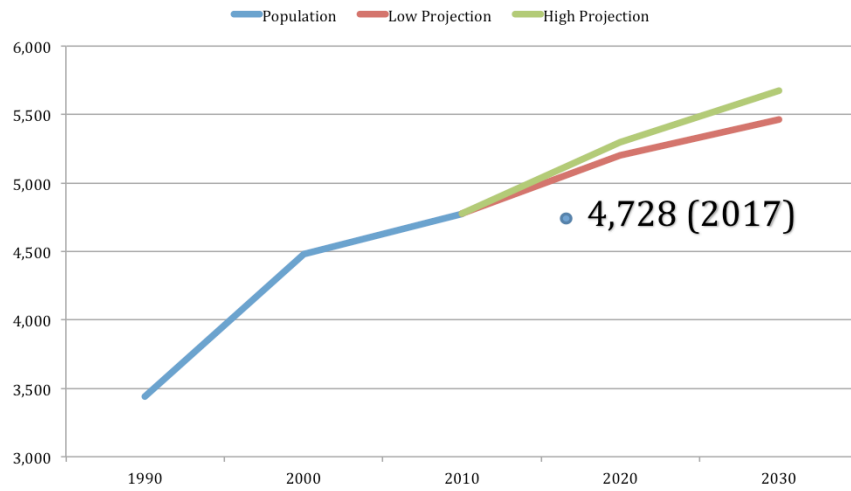
V. Recreation

VI. Environment

- To make manageable, we have broken data into chapters and provide context in each
- MRVPD MOU requires us to collect certain data points and track trends over time
- The Vision lays out what is important to the community and guides the work of MRVPD.
- We are organizing data for this presentation in a way that helps measure our progress toward achieving this vision

I. COMMUNITY

MRV Population & Projections 1990-2030



Source: U.S. Census, VT ACCD

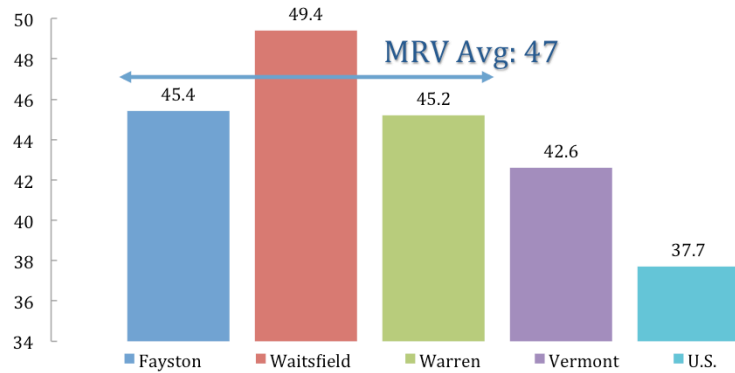
- Community context...Who are we?

Population Stable over time, down slightly 2015-16 (most recent ACS data), not growing as fast as expected

- 2010 population was just under 5,000 people (4,777)
- MRV saw a high rate of population growth between 1990 and 2000 (30%)
- Growth slowed to 7% between 2000 and 2010
- Projected to grow by 14-19% percent, County only by 1-5%
- As of 2016 census update, MRV population was **4,702, down 1.6% from 2010. County Down ~1% from 2010-16 also. State down .4% over same period.**

I. COMMUNITY

Median Age, 2016

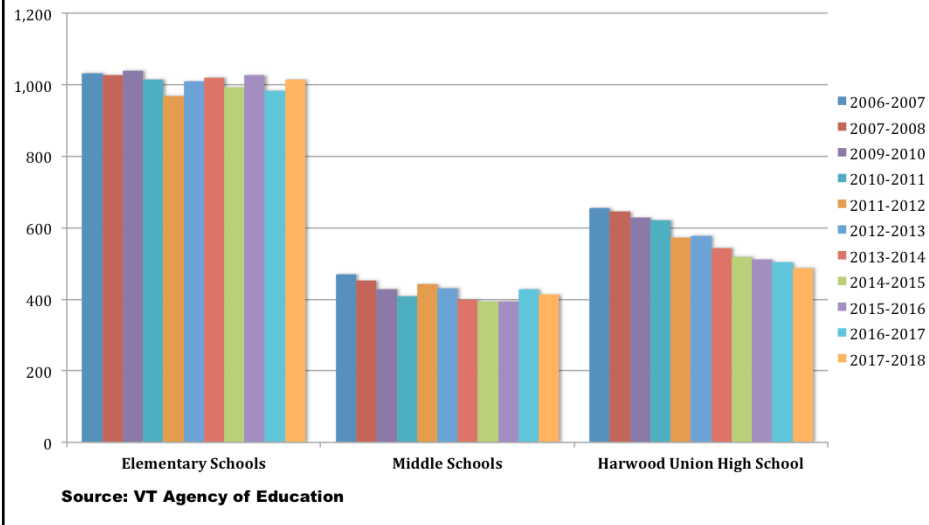


Source: American Community Survey

- Vermont is the 2nd oldest state in the nation (ME oldest, then VT & NH)
- MRV is older than the state as a whole with an avg. age of 47
- Avg. was 40 years in 2000...aging at a faster rate than other areas

I. COMMUNITY

Harwood Unified Union School District Enrollment



MRV Elementary Schools include: Waitsfield, Warren, Fayston, Thatcher Brook (Waterbury);

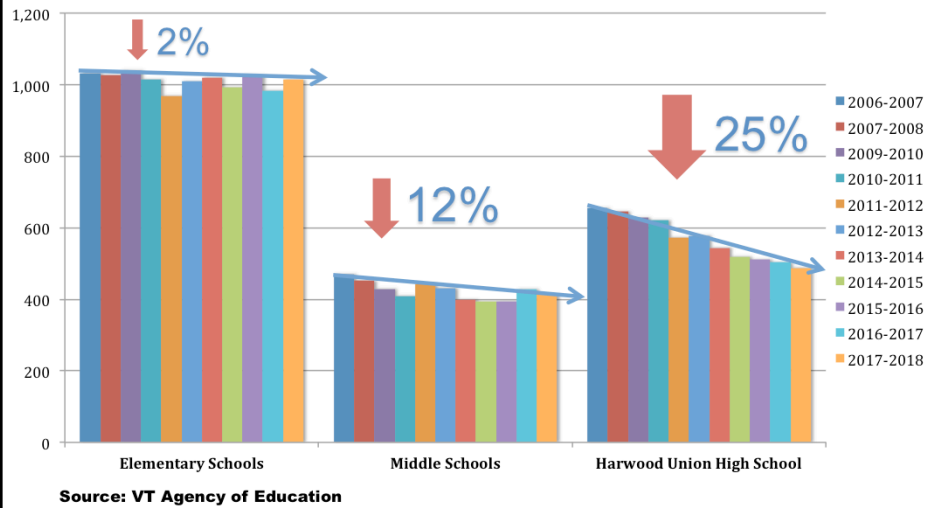
Middle Schools include Crossett Brook, HUMS;

High School is Harwood Union High School

- MRV Elementary school enrollment over the last year actually increased by 3%
- VT Data:
 - 2006-2018: Total enrollment down 9%, Elementary up 5%, Middle down 13%, High School down 24%
 - *Note: Elementary schools have more grades, which can explain more students

I. COMMUNITY

Harwood Unified Union School District Enrollment



2018

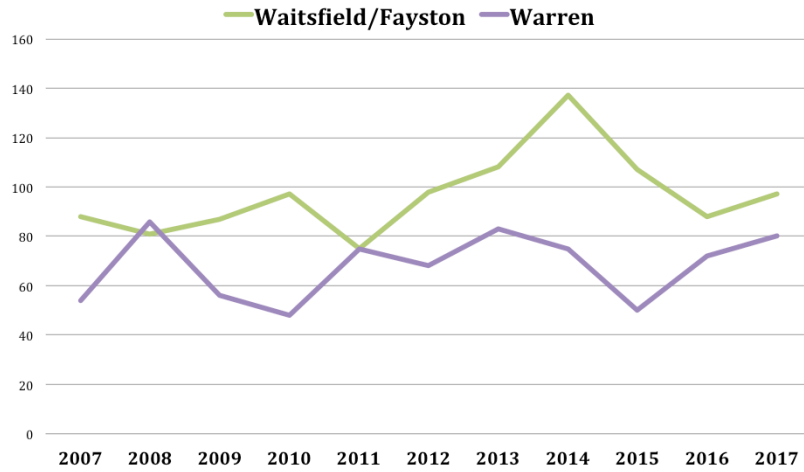
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I. COMMUNITY

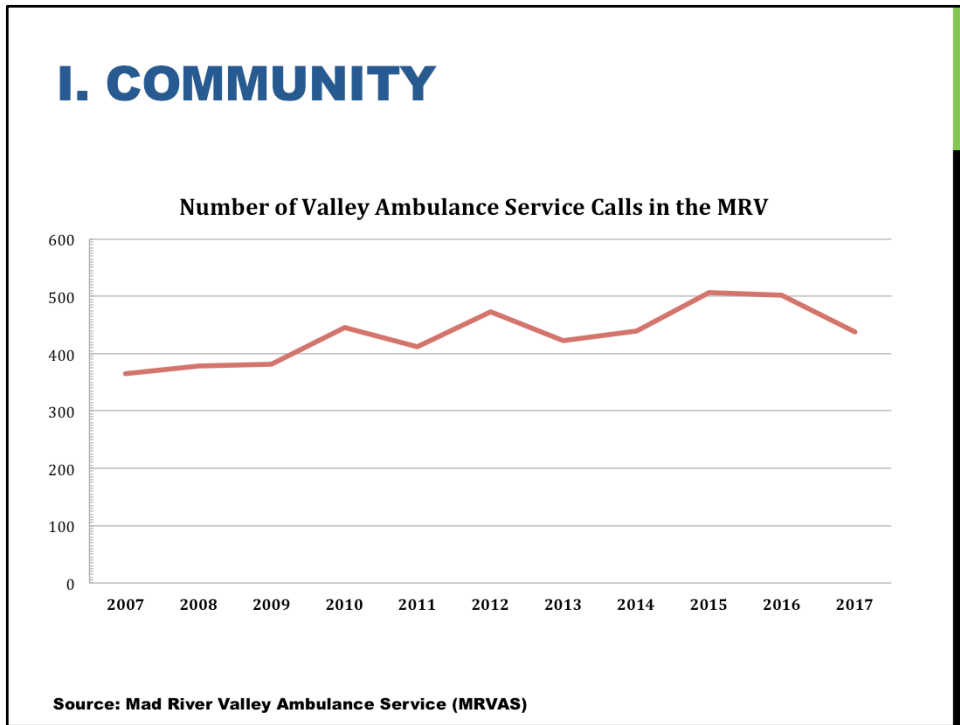
Number of Fire Calls in the MRV



Source: Waittsfield-Fayston, Warren Fire Departments

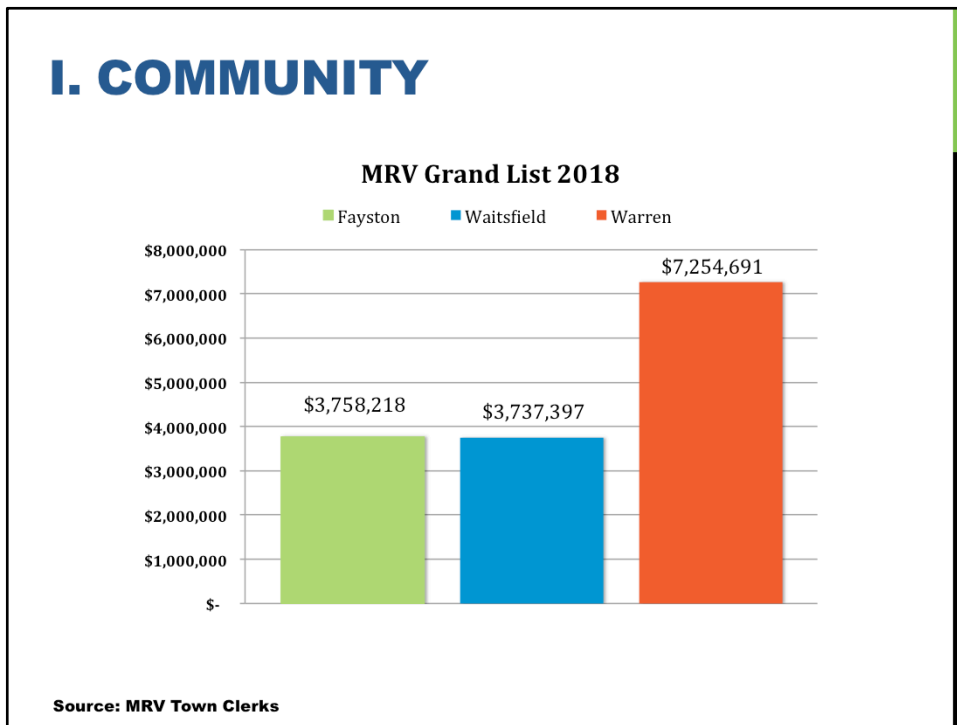
Overall more calls in Waittsfield/Fayston than Warren, but it changes from year to year

I. COMMUNITY



- Ambulance calls **down 13% from 2016; Ambulance calls are up by 20% from 2007 to 2017**
- Not surprising because **age is up in MRV**


I. COMMUNITY



The Grand List is 1% of the listed property value established by the local assessing officials, and the value used to determine municipal taxes within a given town. It includes any business personal property taxable at the local level and excludes locally voted exemptions. Based on the owner of record on April 1 each year.

- Waitsfield and Fayston has nearly identical grand list values
- **Warren is much much larger**
- Year to year changes aren't very large (1% increase overall)
 - Waitsfield, Warren, and Moretown all saw less than 1% increases
 - Fayston saw a 1.4% decrease

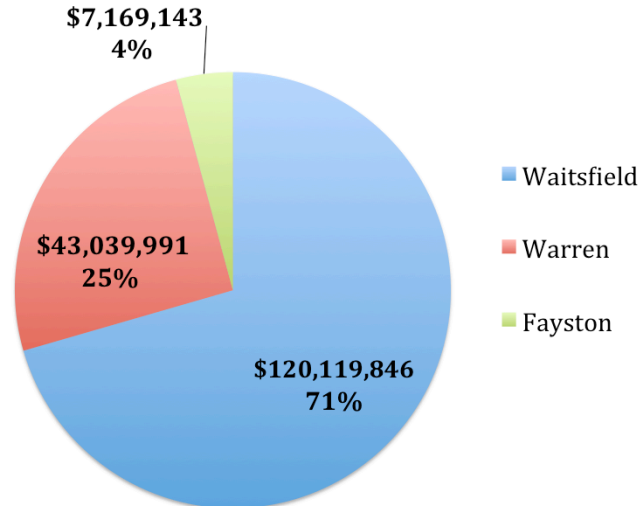
I. COMMUNITY...TAKEAWAYS

- **Aging population**
- **Population not growing as quickly as predicted**
- **High School & Middle School enrollment** 
- **Elementary enrollment stable**
- **Ambulance calls up over time**

Important to consider future service provision given community demographics and trends

II. ECONOMY

2017 MRV Gross Sales Tax Receipts by Town

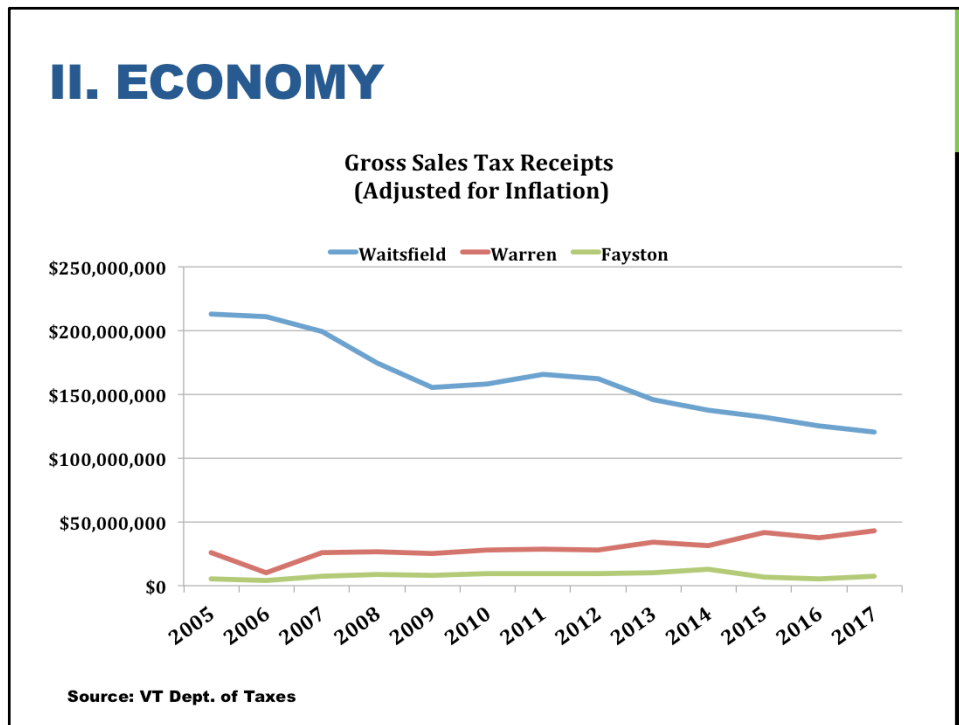


Source: VT Dept. of Taxes

We also analyzed data related to sales tax receipts in the MRV

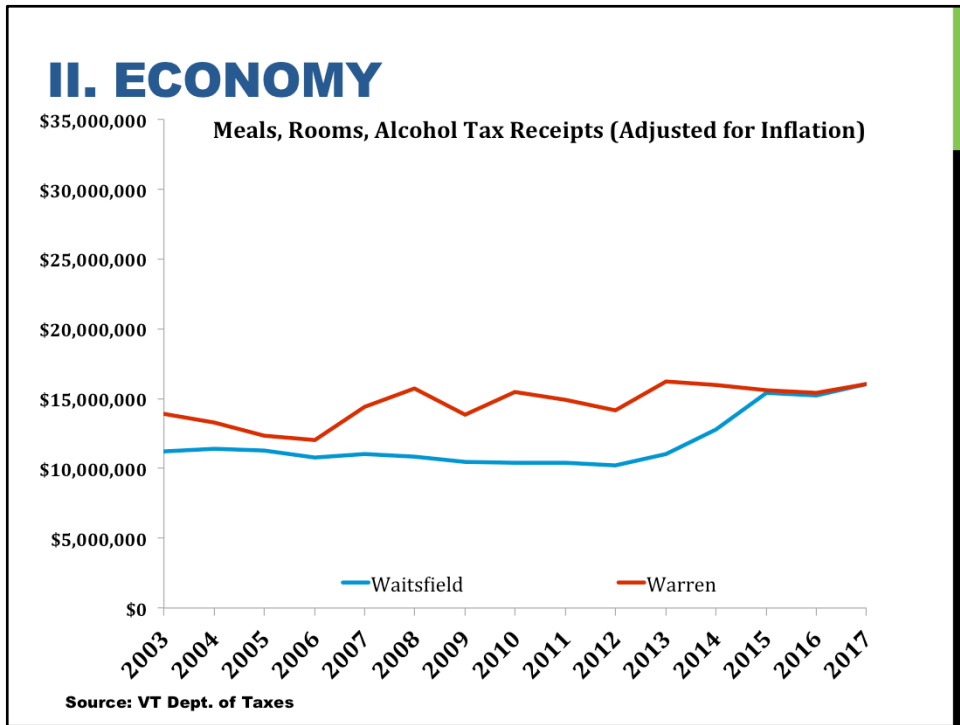
- “Gross” receipts” are the **sum of all sales that happen in a municipality**. This may include both taxable sales (toys, tools, etc.) and nontaxable sales (clothing, food products, etc.) but will not include the sales for which Use tax is remitted by businesses in that town. may or may not include sales subject to exemptions.
- Graph shows gross sales tax receipts by town for 2017 (Overall down 1% from 2016 after inflation)
- Shows predominance of sales tax revenue in Waitsfield, defined as the MRV’s commercial center

II. ECONOMY



Overall there has been a **downward trend in gross sales since 2005, falling 30% since 2005**

- The majority of the decrease found in the MRV can be attributed to Waitsfield, which has experienced a **44% decrease in receipts since 2005**.
- While a much smaller volume, **Warren has experienced an upward trend during this same time period (2005 to 2017), an increase of 67%**. Fayston has increased by 30% from 2005 to 2017.



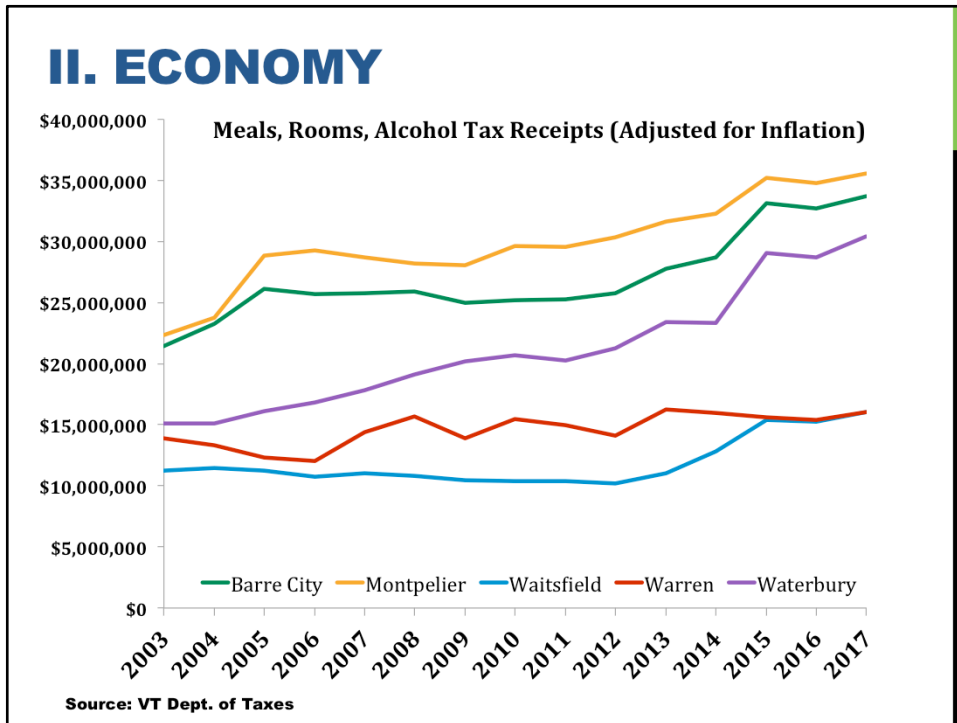
BUT some sales are increasing for Waitfield...Meals, Rooms and Alcohol Receipts (total taxable receipts value, not total tax amount collected)

Graph shows a comparison of Waitfield and Warren’s combined inflation adjusted Meals, Rooms, and Alcohol tax receipts:

- Consistent gains in Waitfield since 2012, **overall 25% increase from 2014 to 2017** —now **stabilizing (up 5% from 2016)**
- Warren’s receipts have generally been more volatile over time and saw an **increase of 1% 2014-2017, and increase of 4% from 2016**

*Fayston not included **as less than 10 accounts reporting** leads to suppression of receipts data to protect confidentiality

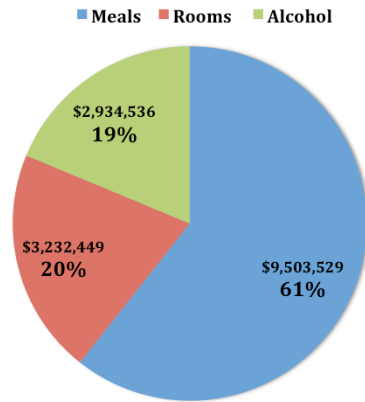
II. ECONOMY



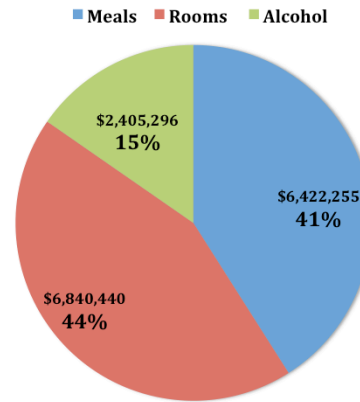
- Shows a comparison of Meals, Rooms, & Alcohol tax receipts within the region,
- Upward trend for Montpelier, Waitsfield, and **Waterbury (steepest increase of all areas from 2014-17 with 30%, Waitsfield close second at 25% increase from 2014-17)**
 - *Note: Barre population =~8000, Montpelier ~7500, Waterbury ~1833, Waitsfield ~1709, Warren ~1677
- Waitsfield trending like cities, though all beginning to level off
- Warren seems to be stabilizing w/ modest gain

II. ECONOMY

2017 Waitsfield Tax Receipts



2017 Warren Tax Receipts



Source: VT Dept. of Taxes

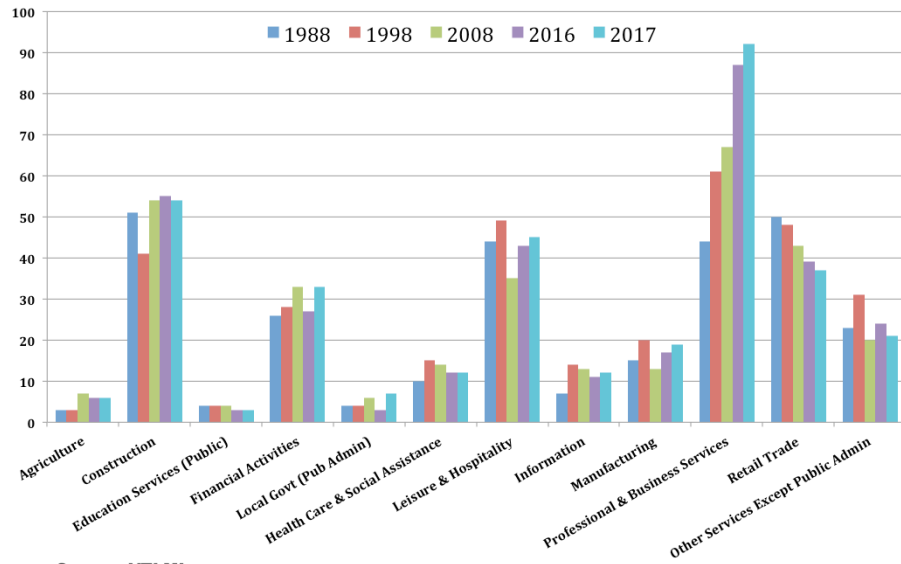
Meals, Rooms & Alcohol Receipts breakdown between Warren & Waitsfield
Comparison of 2017 tax receipts by town illustrates a **predominance of meals revenue in Waitsfield and lodging revenue in Warren.**

- Compared to 2016 receipts, Waitsfield **experienced increased tax receipts for Meals/Alcohol, decrease for Rooms, & Warren experienced the same**
 - Alcohol receipts increased by 5% in Waitsfield and 4% in Warren.
 - Meals receipts increased 8% in Waitsfield and a 10% in Warren.
 - Rooms receipts showed a 2% decrease in Waitsfield, 1% decrease for Warren

Fayston's M/R/A tax receipts were suppressed due to a confidentiality threshold for towns that have fewer than 10 businesses reporting.

II. ECONOMY

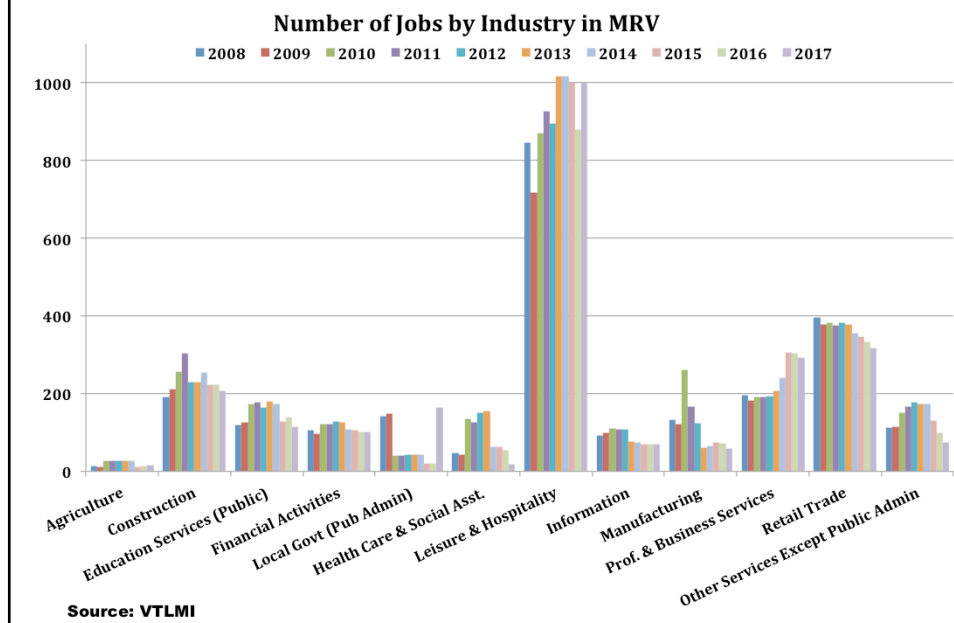
Number of Businesses by Industry



Source: VTLMI

- MRVPD also gathers data about MRV Employment
- *Note: Not all categories/ sectors of employment are shown here; Graph shows trends over 3 decades and most current two years
- **Construction, Leisure & Hospitality, & Professional & Business Services** are a large part of the MRV economy
- More gains than losses in terms of the number of businesses between 2016 and 2017, **4% gain overall between 2016-2017 (from 327 to 341 businesses)** in these categories

II. ECONOMY

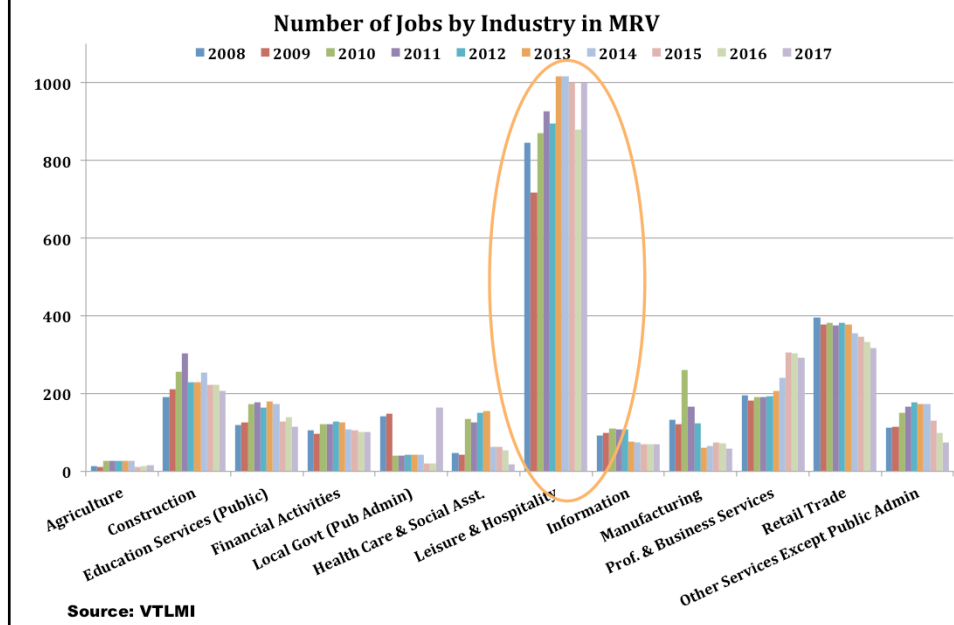


- *Note: Graph shows covered employment (jobs covered by unemployment insurance); This represents the number of jobs, not workers (1 worker could have more than 1 job)

- **38% of the total jobs in MRV are in the Leisure & Hospitality sector; 12% of total jobs in Retail**

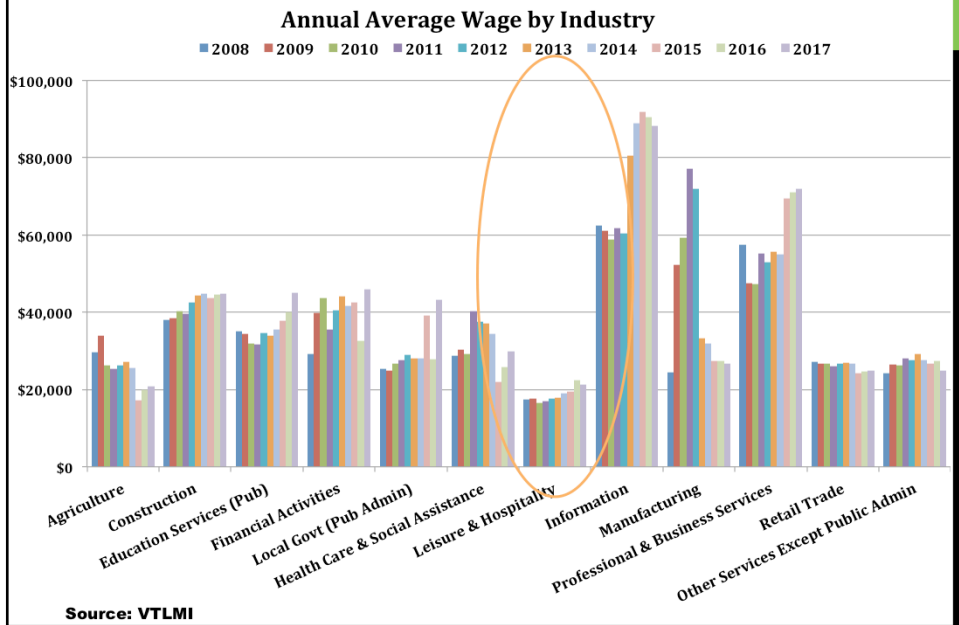
Figures important relative to each other, though sector definitions change which can explain some gains and losses

II. ECONOMY



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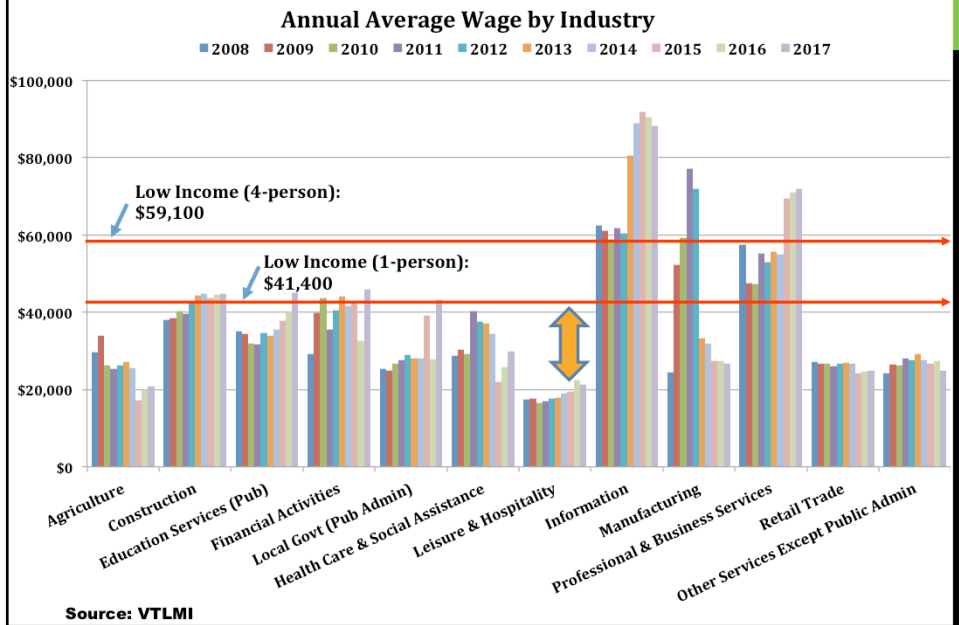
II. ECONOMY



Also important to consider is what workers are earning in sectors with most of the MRV's jobs:

- Highest wages are in **Information (3% of total jobs)** and **Professional & Business Services (11% of jobs)**
- Leisure & Hospitality employs the most people (**38% of total jobs**), but has the lowest average annual wages: **\$19,560- \$24,159 over the last 10 years, down 5% from 2016 to 2017. Annual average wage for Leisure & Hospitality in 2017 was \$21,246**

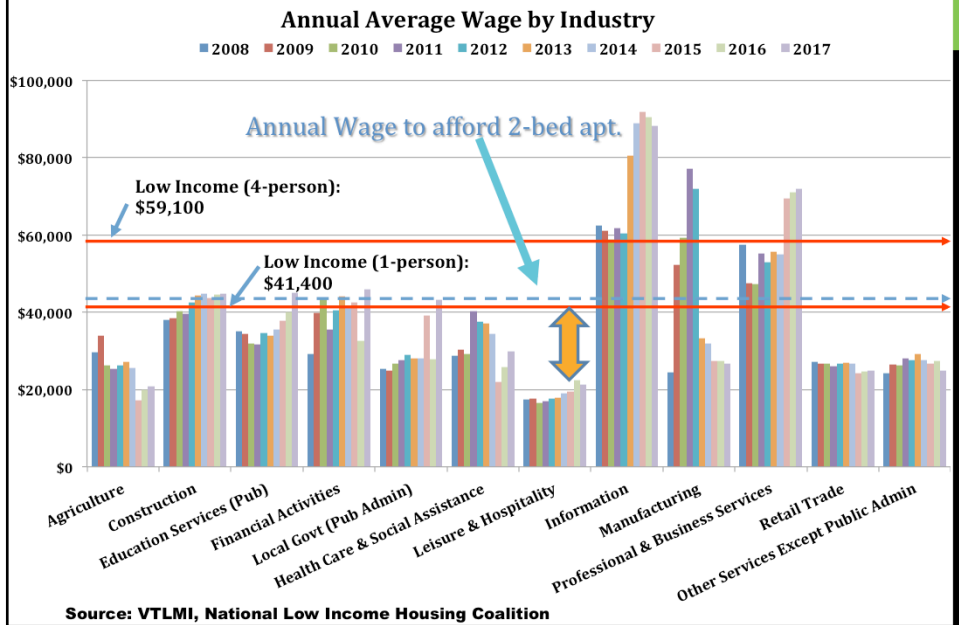
II. ECONOMY



To provide context:

- The definition of Low income is 80% of Area Median Income (AMI) or below. (Dept. of Housing & Urban Development-HUD upper limit for Low Income in Washington Co. is \$59,100 for a 4 person household, \$41,400 for 1 person). 2017 Washington Co. AMI is \$73,900 for a 4 person household.
- Identifies a gap for many industries, where average wages fall below low income status

II. ECONOMY




Blue dashed line shows annual wage to afford a modest 2 bed apartment at Fair Market Rent (HUD) in Washington Co. **\$42,560 (In MRV, would be \$42,700 based on average MRV Gross Rent cost).**

Again identifies a gap, emphasizing housing affordability issues for single-job workers

*Note Fair Market Rent (FMR) is defined by the Dept. of Housing & Urban Development (HUD) as 40th percentile of all gross rents on market for a given number of bedrooms

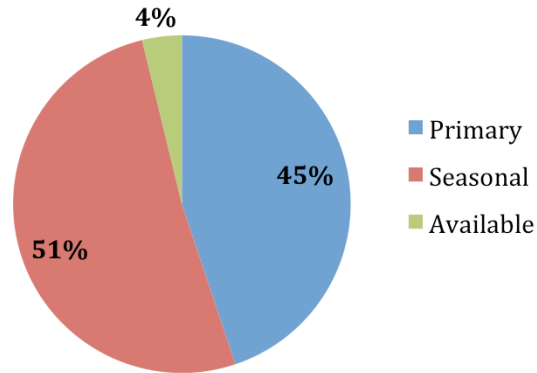
II. ECONOMY...TAKEAWAYS

- **Meals & Alcohol receipts** 
- **Gross sales receipts decreasing over time**
- **Professional & Business Services sector is strong with largest number of businesses, high wages**
- **Leisure & Hospitality sector employs the majority of people, offers lowest wages**

- Increases in Meals & Alcohol receipts could point toward success of local/craft food/drink scene; will be interesting to look at data next few years with new businesses
- Decline in sales tax may be related to forces we cannot control (online purchasing) but focusing on improving the commercial center in Irasville could influence the trend in the future
- Industry and wage composition in the Valley could impact future community composition trends

III. HOUSING

MRV Housing Units, 2016



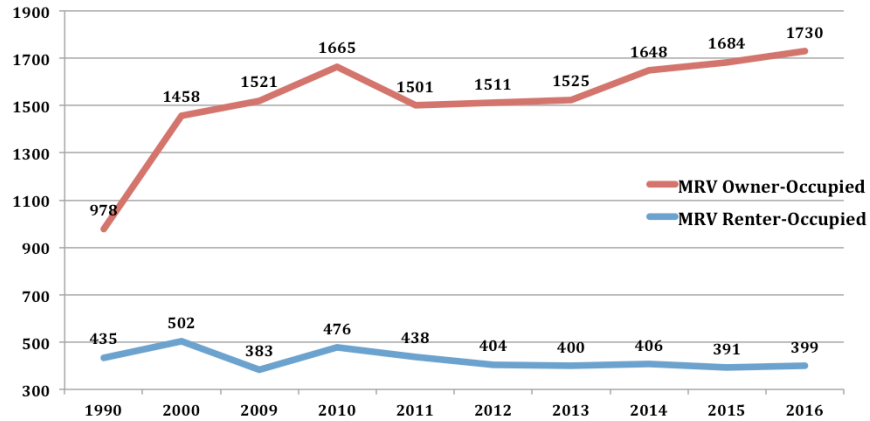
Source: American Community Survey

Another crucial area where we collect data is Housing

- Graph shows composition of housing stock in MRV
- **51% seasonal**, compared to 53% in 2015
- **Seasonal Housing % By Town—Fayston: 48%, Waits 19%, Warren 66%**
- Seasonal means away from residence for over 2 mos./year
- Vacancies are up from 3% (2015) to 4% in 2016
- Majority of available unit increase was in Waitsfield

III. HOUSING

MRV Owner & Renter-Occupied Housing Units 1990-2016



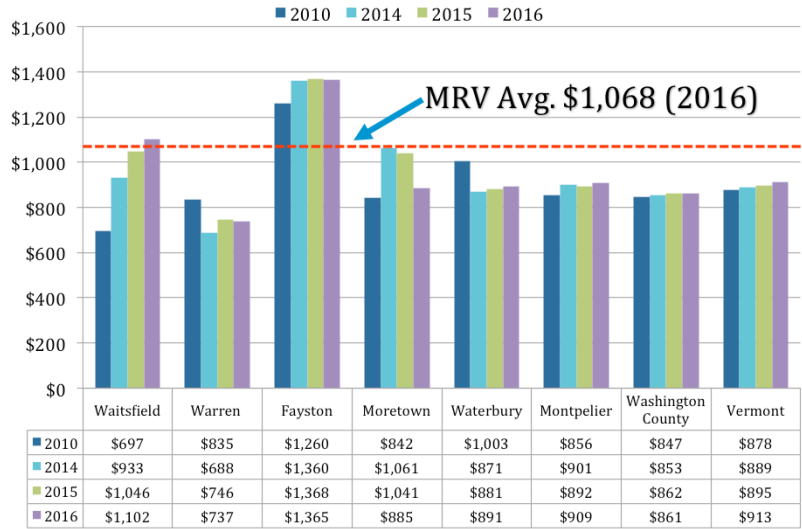
Source: U.S. Census, American Community Survey, VT Housing Data

Since 2010, the MRV has seen a 16% reduction in the number of renter-occupied housing units and 4% increase in owner-occupied. This could be related to the rise in popularity of online short-term rental websites, reducing total units on the market, but there is not sufficient data to prove causation at this time.

MRV: 81% Owner/ 19% renter; Compared to VT 71% Owner/ 29% renter

III. HOUSING

Median Gross Rents 2010-2016

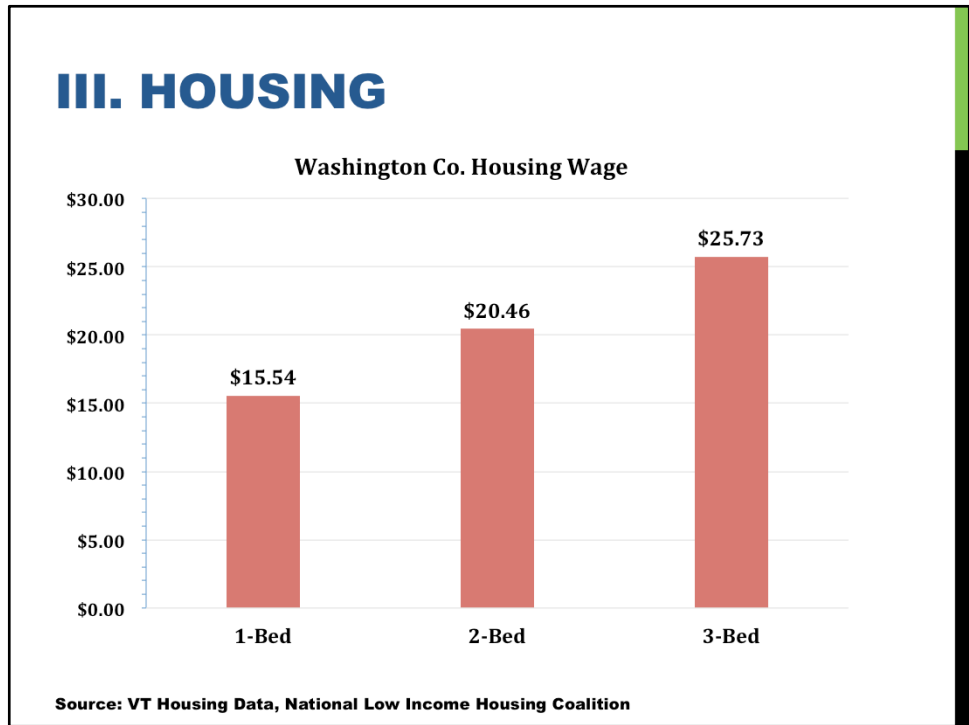


Source: American Community Survey

To investigate the owner/renter trends, we looked at Median Gross Rent cost (*Most recent data from 2016):

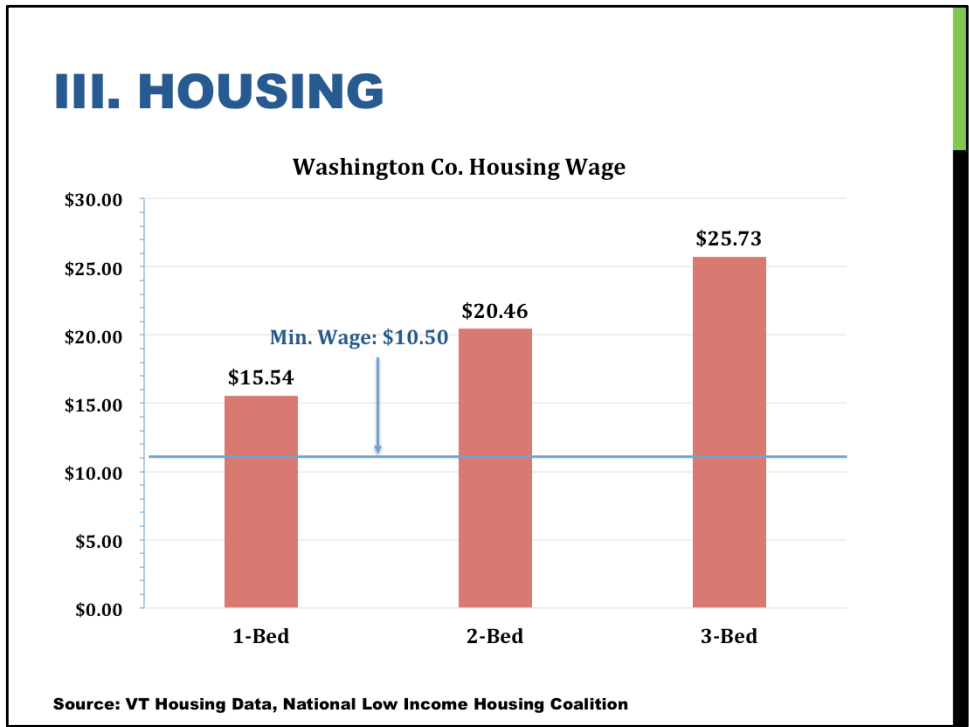
- The **average Median Gross Rent in the three MRV towns was \$1,068 in 2016**, up slightly from \$1,053 in 2015 & \$994 in 2014.
- The three highest Median Gross Rents in 2016 are in Waitsfield, Fayston & Vermont overall.
- **Substantial increase in rents in Waitsfield** (up 5% from 2015, 18% from 2014-16)
- **Warren has the most affordable rent**, continuing to track below the statewide average.
- **Fair Market Rent for Washington Co. is: 1 bed- \$808, 2-**\$1064**, 3- \$1338**; Median Gross Rent accounts for all unit sizes including utilities (50th percentile of all gross rents on market for all Bedrooms)
 - *Note Fair Market Rent (FMR) is defined by HUD as 40th percentile of all gross rents on market for a given number of bedrooms

III. HOUSING



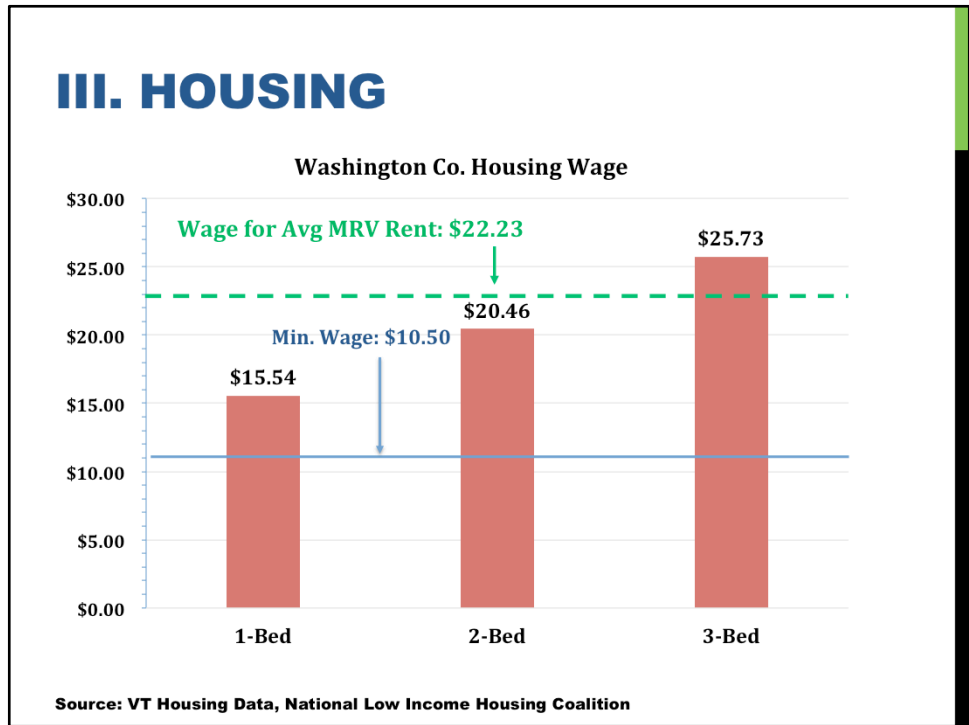
- Housing wage is the hourly wage a worker must earn to afford a modest apartment without spending more than 30% of income on rent & utilities (gross rent)
- \$42,560 is the annual wage required to afford a 2-bedroom apartment in Washington Co., slightly lower than VT overall
- VT 2-bed housing wage is \$22.40
- Source: National Low Income Housing Coalition, *Out of Reach Report* (2018) <https://nlihc.org/oor>

III. HOUSING



- **An individual must work 78 hours per week** at minimum wage to afford a Washington Co. 2 bedroom apartment

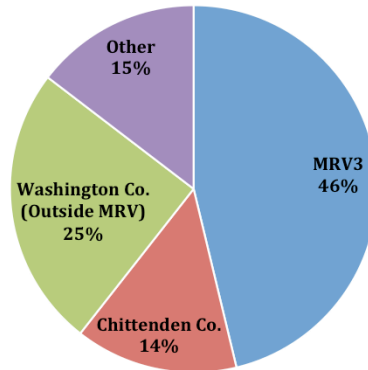
III. HOUSING



- To afford the Average MRV Gross Rent of \$1,068, one would have to **make \$42,720/yr or \$22.23/hr at 40 hours per week**
- At minimum wage, a person would need to work 85 hours per week to afford the Average MRV Gross Rent

III. HOUSING

Where Sugarbush Employees Live 2017/18 Season




Source: Sugarbush Resort

Sugarbush Resort conducts an annual employee survey, which they provide to MRVPD. The number of Sugarbush employees surveyed was up 5% from 2016/17 to 2017/18 (746 total employees surveyed in 2017/18)

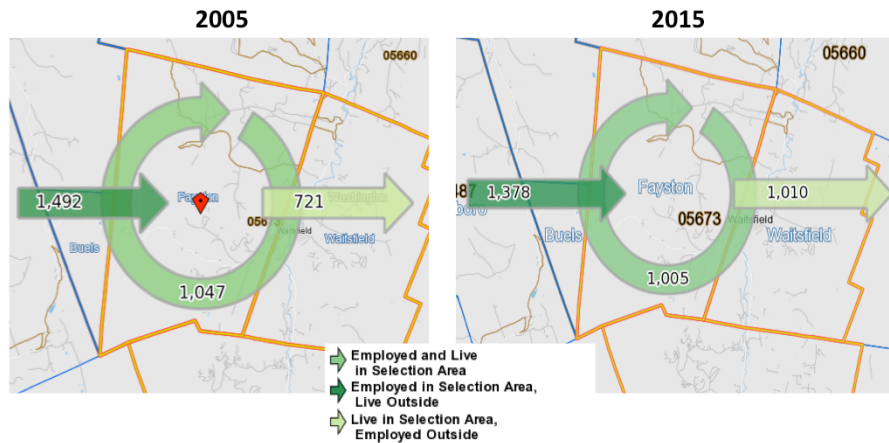
- 46% live in one of the three MRV towns; 54% outside
- Majority live in Warren

I. HOUSING...TAKEAWAYS

- Majority of housing stock is seasonal
- Number of rental units remains low
- Monthly rent 
- Cost of housing unaffordable for most single-job holders

IV. TRANSPORTATION

MRV Commuting Patterns



Source: U.S. Census, On The Map

On the Map is a data model produced by the U.S. Census Bureau that anyone can access to seek information about commuting patterns in the U.S. (<https://onthemap.ces.census.gov/>)

- In the MRV, the biggest change from 2005 to 2015 (*most recent data) has been the increase in people **commuting out** of MRV
- Overall number workers increased by 133, or 4% from 2005-15
- **Number of people commuting in has decreased by 114** over the last 10 years (46% of total count recorded in 2005...41% in 2015)
- **Number of people living & working in the MRV decreased slightly by 42** (32% in 2005...30% in 2015)
- **Number of people commuting out has increased by 281** (22% in 2005...30% in 2015)

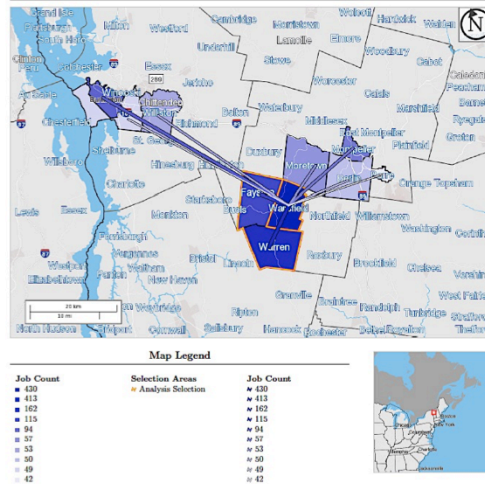
IV. TRANSPORTATION

Where MRV Residents Work:

Primary Jobs for All Workers in 2015

Created by the U.S. Census Bureau's OnTheMap <http://onthemap.sea.census.gov> on 11/26/2015

Counts of Primary Jobs from Home Selection Area to Work County Subdivisions in 2015
All Workers



Source: U.S. Census, On The Map

- This graphic from On the Map shows the **Top 10 Towns where MRV residents travel to work**
- Highest concentration work in MRV
- Burlington is where 6% of MRV residents work and Montpelier employs 5% of MRV residents

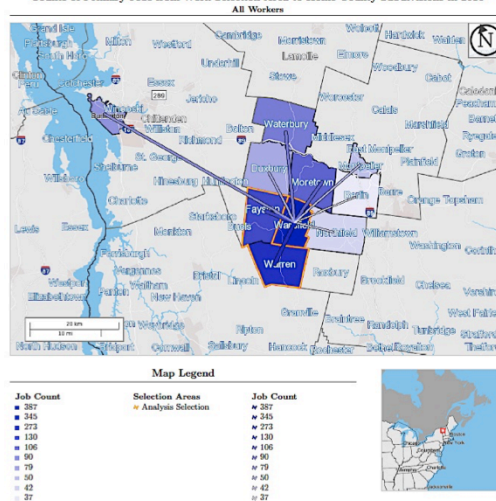
IV. TRANSPORTATION

Where Workers in MRV Live:

Primary Jobs for All Workers in 2015

Created by the U.S. Census Bureau's OnTheMap <https://onthemap.ces.census.gov> on 11/28/2018

Counts of Primary Jobs from Work Selection Area to Home County Subdivisions in 2015

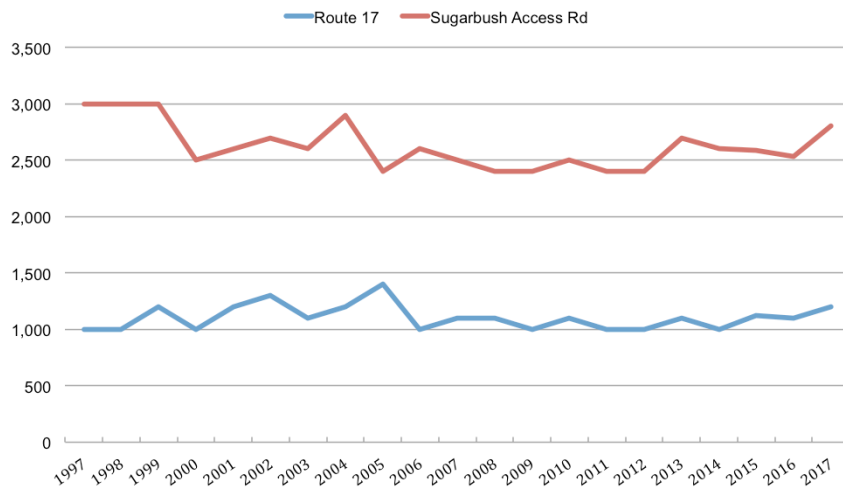


Source: U.S. Census, On The Map

- This graphic from On the Map shows the **Top 10 places where people who work in the MRV live**
- These destinations are similar to the destinations where MRV residents work, indicating an exchange of commuters between these areas
- Highest concentration of MRV workers live in the MRV
- Waterbury is where 4.4% of MRV workers reside, and 4% live in Burlington

IV. TRANSPORTATION

Average Annual Traffic at Sugarbush Access Road, Route 17



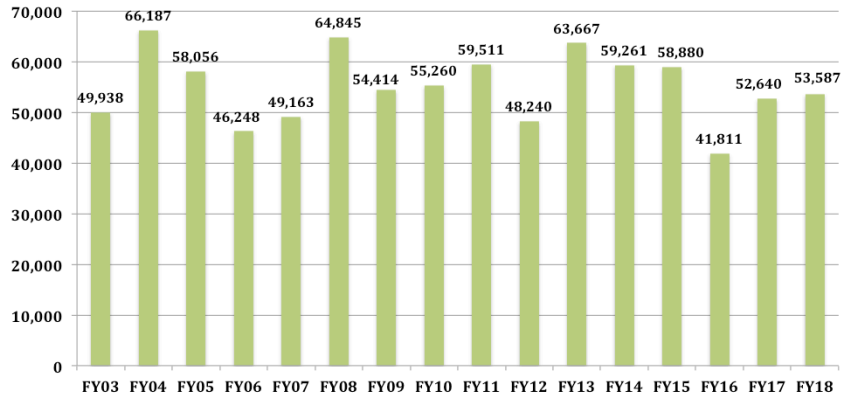
Source: VTrans

MRVPD also gathers traffic count data from VTrans counters.

- Traffic increased on both Route 17 (Counter Location: VT Route 17, 25ft West of Battleground Condos) and Sugarbush Access Rd (0.2 miles West of German Flats Rd) between 2016 & 2017
- In 2017, Sugarbush Access Rd traffic volumes rose to volumes last seen in 2004

IV. TRANSPORTATION

MRV Bus Ridership FY03-FY17




Source: Green Mountain Transit (GMT)

The MRV's seasonal transit provider, Green Mountain Transit (GMT) which is funded ~90% by Sugarbush Resort, provides ridership data to the MRVPD annually

- Fiscal Year (FY) 2018 shows a 2% increase in ridership compared to the previous fiscal year; changes in routes and service in the 2018/19 season could impact ridership

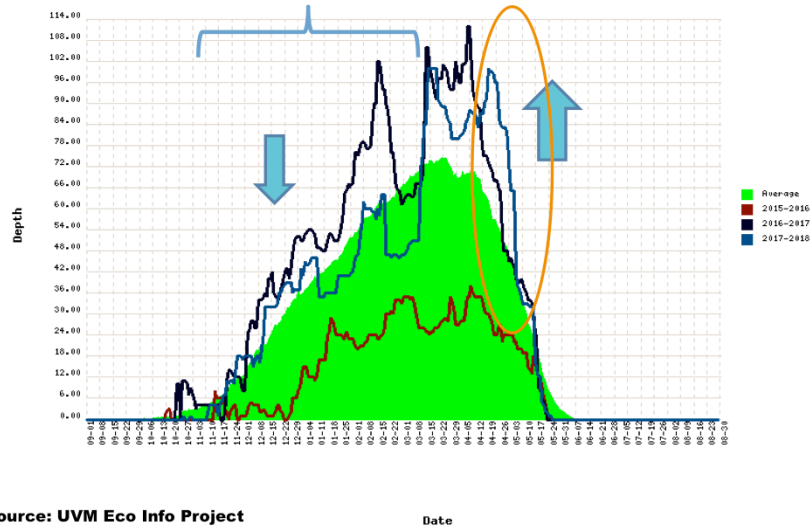
IV. TRANSPORTATION...TAKEAWAYS

- **Residents commuting out for work** 
- **High percentage of people who both live and work here**
- **Traffic generally stable, increased on Rt 17 & Sugarbush Access Rd last year**
- **Bus ridership remained stable**

- Increased ridership is likely needed to support a sustainable transit service into the future

V. RECREATION

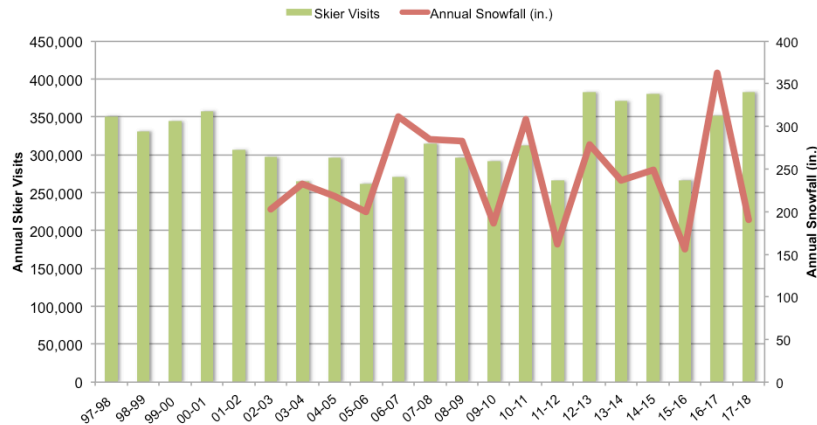
Mount Mansfield Summit Station



- Snow depth was below normal for a significant amount of the 17-18 season, however late season snowfall after the April 12 recording was significantly higher than average, which positively affected skier visits at resorts statewide

V. RECREATION

Sugarbush Skier Visits & Annual Snowfall 1998-2018



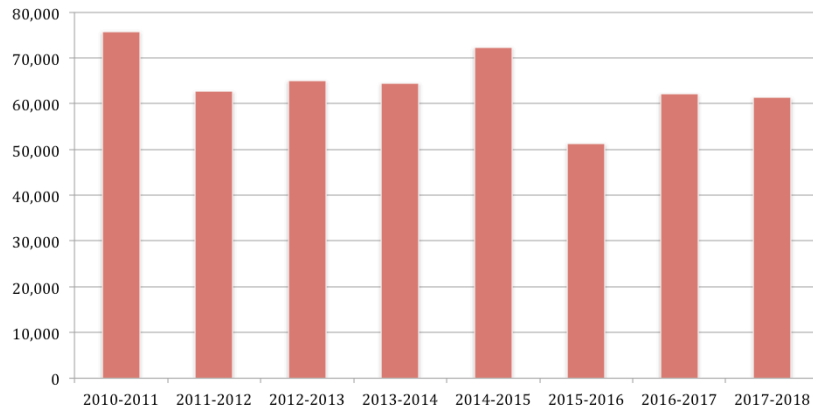
Source: Sugarbush Resort

Sugarbush Resort provides annual skier visit and snowfall data to MRVPD in an annual data report as part of the Memorandum of Understanding (MOU) between Sugarbush, Waitsfield, Warren, Fayston and the MRVPD

- The State saw an increase in skier visits of **1.2%** last season
- Sugarbush saw a **9% increase** in ski visits in the 2017/2018 **despite a 48% decrease in snowfall**
- (Potential factors: Improved snowmaking technology, late season snow that usually does not occur—success can be about when snow falls, not necessarily how much)

V. RECREATION

Mad River Glen Skier Visits 2011-2018

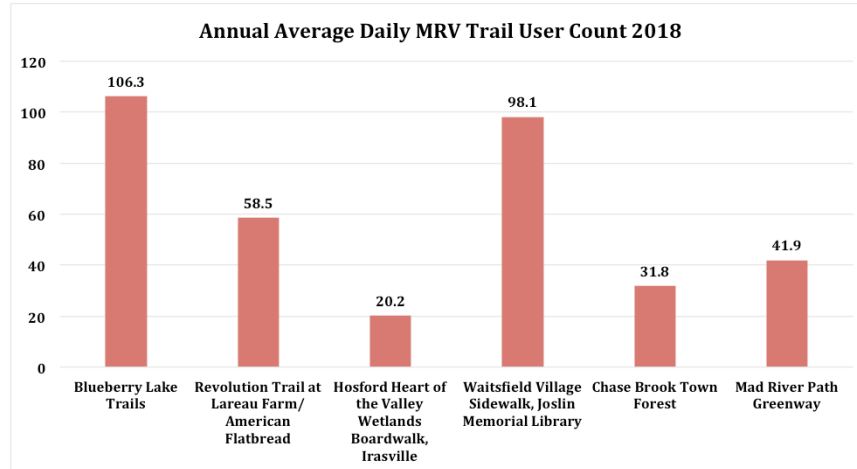


Source: Mad River Glen

Mad River Glen also provides MRVPD with annual data.

- Ski visits at Mad River Glen were stable, ~1% down from 2016/17

V. RECREATION



Source: MRVPD, CVRPC, MRV Moves (2016), National Bike & Pedestrian Documentation Project



MRVPD has recently begun working in partnership with Central Vermont Regional Planning Commission to collect trail user count data in the MRV given that natural resources & recreation are defining features of MRV's identity, and scientific research has established that recreation and conservation efforts are proven to have an economic multiplier.

- The 2018 data updated counts at sites that were analyzed during the 2016 MRV Moves Active and collected data at new locations (Chase Brook Town Forest & Mad River Path Greenway).
- The 2018 counts were taken during ~2 week periods between Aug. 21 – Oct. 12, 2018 and, as with the MRV Moves Study, the National Bike & Pedestrian Documentation Project Extrapolation Formula Workbook was used to extrapolate average weekly data to annual average daily counts. The average annual numbers account for seasonal variation in user activity as summer/fall activity is generally higher.
- Compared to 2016, Blueberry Lake Trails activity increased by 59%, Revolution Trail activity increased by 41%, Waitsfield West Sidewalk increased by 28% and the Hosford Heart of the Valley Wetland Boardwalk decreased slightly, though significant construction was taking place during the counting period in 2018 that was not occurring in 2016.

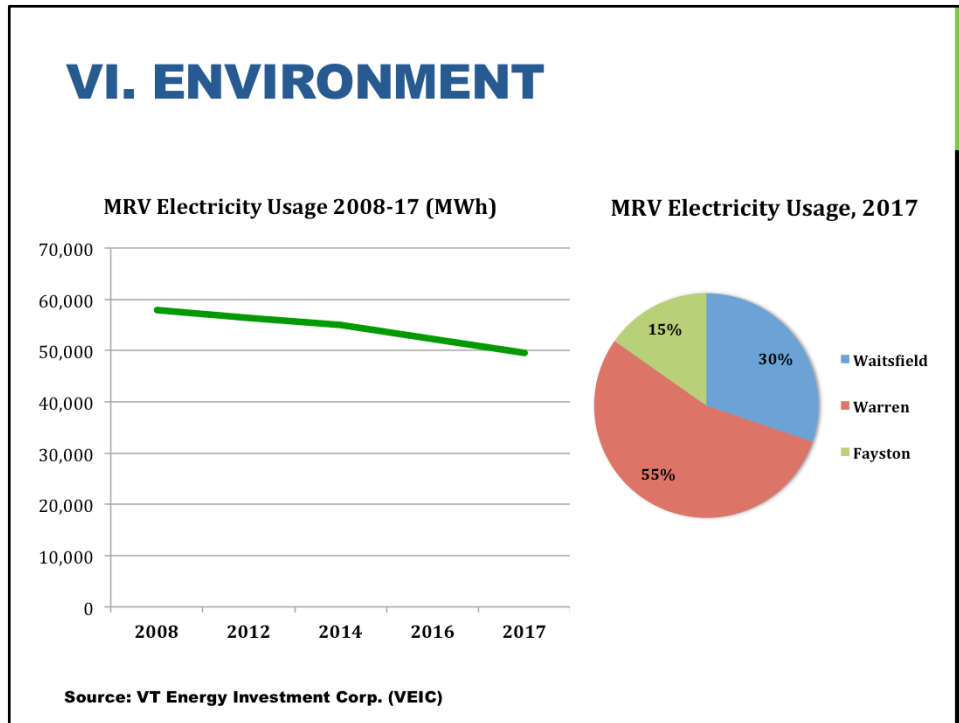
*NOTE: This publication presents the most current data available, and the methodology for extrapolation was updated based on improvements adopted by the consultant who completed the 2016 MRV Moves Study. Trends in the data remain very similar to data computed in the original methodology, though actual count numbers may differ. Activity levels at sites naturally differ based on their geographic location and predominant activities that take place there.

**Please also note that the data that included Labor Day in the Blueberry Lake and Revolution Trail counts was excluded to ensure counts were not overestimated. Additionally, the 2018 counts taken at the Hosford Heart of the Valley Wetland Boardwalk were taken during a construction period, which may impact results.

IV. RECREATION...TAKEAWAYS

- Snow 
- Skier visits 
- Timing of weather patterns may matter more for recreation success
- Trail use remains a significant part of year-round recreation
- Additional data points needed to assess year-round recreation

VI. ENVIRONMENT

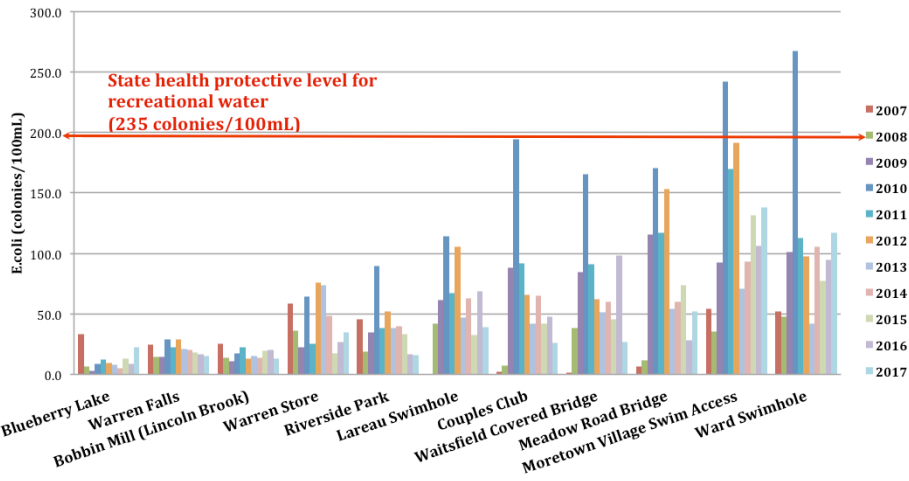


Vermont Energy Investment Corporation (VEIC) provides the MRVPD with annual energy consumption data.

- Overall a downward trend in consumption in all three towns since 2008, overall **down 9% from 2016, biggest decrease was in Warren, which was down 14% from 2016 to 2017**
 - **A key factor in this decrease for Warren is the energy savings strategies used by Sugarbush Resort, and particularly the enhanced snowgun technology**
- **Warren accounts for 55% of the Valley's electric consumption (down from 63% in 2016), largely due to the use by the ski resort**
- **Total cost savings since 2015 for the MRV equal \$993,335; From 2016-17 the MRV saved \$409,574 in electric costs**
- Sugarbush: Provides MRVPD with annual energy usage data as part of the MOU
 - Sugarbush decreased overall energy usage from 2016 to 2017
 - Sugarbush Peak energy demand was lower for every month compared to the previous year except November, likely due to a lack of early snowfall
 - Factors in decreased consumption include: Snowmaking infrastructure energy efficiency upgrades as well as updated building and site lighting and motor/pump upgrades

VI. ENVIRONMENT

Mad River E.coli Monitoring






Source: Friends of the Mad River

The Friends of the Mad River also provides data about their work, including E.coli counts which provide insights about water quality

- This graph shows annual average E. coli counts over the last 10 years
- Though test dates impact data due to unique weather events, the prevailing trend is that E. Coli counts increase consistently from upstream to downstream areas

IV. ENVIRONMENT...TAKEAWAYS

- **Electrical consumption** 
- **Electric cost savings** 
- **Energy use at Sugarbush Resort** 
- **Surface & stormwater runoff remain a concern for water quality, from upstream to downstream areas**

Total MRV energy cost savings since 2015 = \$993,335; From 2016 to 2017, Savings = \$409,574

STRENGTHS

- **Elementary Schools**
- **Diverse economy**
- **Meals, rooms, & alcohol receipts**
- **Energy efficiency**
- **Winter and year-round recreation**
- **Natural Resources/
Conserved lands**

CHALLENGES

- **Aging**
- **High School enrollment**
- **Gross sales receipts**
- **Housing affordability**
- **Sustainable transit ridership**
- **Stormwater runoff**



MAD RIVER VALLEY
PLANNING DISTRICT
Fayston • Waitsfield • Warren

Thank you!

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