

THE CITY OF ESSEX JUNCTION COMMUNITY
VISION & STRATEGIC ACTION PLAN

BENCHMARK REPORT

VERMONT, USA

JANUARY 2024





THE CITY OF ESSEX JUNCTION COMMUNITY
VISION & STRATEGIC ACTION PLAN

BENCHMARK REPORT

VERMONT, USA

JANUARY 2024

This report summarizes the benchmarking analysis that is part of the City of Essex Junction Community Vision and Strategic Action Plan project.

This report and the associated data analysis are available at:
lab2.future-iq.com/essex-junction-visionstrategic-action-plan

REPORT PREPARED BY:

future→iQ[®]
Create Future Intelligence[®]





»»»»» TABLE OF CONTENTS

- Overview of the Benchmark Report..... 1
- 1.0 | Key Demographic Indicators2
 - 1.1 | Workforce Profile3
 - 1.2 | Housing Affordability.....4
- 2.0 | Benchmarking Peer Communities..... 5
 - 2.1 | Benchmark - Metro & Workforce Factors6
 - 2.2 | Benchmark - St. Albans.....7
 - 2.3 | Benchmark - Williston..... 8
 - 2.4 | Benchmark - Winooski9
 - 2.5 | Benchmark - South Burlington.....11
- 3.0 | Comparative Analysis-Peer Counties12
- 4.0 | Acknowledgements 14
- 5.0 | For More Information..... 15



The City of Essex Junction is situated in a diverse and dynamic part of the State of Vermont.

This benchmark report serves as a tool to build an understanding of the basic demographics of the City of Essex Junction with a review of peer communities. The report covers a wide range of topics, including key demographic data and economic factors both locally and regionally, along with peer community demographic comparisons. By examining these key indicators, the benchmark report offers valuable insights into the City of Essex Junction’s local and regional conditions.

Benchmarking is an important step in evaluating the potential gaps and strengths of a region. It also helps inform the strategic actions taken to fill those gaps and build agility and resiliency over the long term.

One of the central focuses of the City of Essex Junction benchmark report is its economic performance.

This includes metrics such as employment rates, income levels, and business growth. Data for smaller communities is often harder to ascertain and often does not provide the best context for understanding the economic conditions. In this report, there is a blend of material that highlights local available data along with broader economic data that allows for relevant comparisons.

In addition to economics, the report delves into various social and quality of life factors. This includes data on educational achievement, healthcare access, and other vital components of community well-being. The City of Essex Junction benchmark report aims to be a vital resource for government officials, businesses, and residents alike, aiding in strategic planning and policy decisions that can help improve the overall quality of life in the city.



1.0 | KEY DEMOGRAPHIC INDICATORS

Below are the vital statistics for the City of Essex Junction, Vermont. These statistics highlight mostly positive characteristics for the community.

All signs point to a well-educated, younger population when compared to the state of Vermont. The city is well situated demographically with higher levels of education and income. Further, Chittenden County is an attractant regionally for living and working. These vitals offer competitive advantages for the City of Essex Junction.



POPULATION GROWTH

The population of the City of Essex Junction stands at 10,590¹. The median age is about 40 years old, roughly three years younger than the state average. The City of Essex Junction has a smaller proportion of residents 65 or older than the state average as well². Chittenden County is the only county in Vermont which has seen significant population growth in the past few decades with most of the States counties remaining stagnant or dropping in population.



MIGRATION

The migration patterns in Chittenden County have seen positive net migration since 2016. The net influx of migrants is due to a number of factors including the proximity of Burlington, the employment opportunities afforded by major employers in the county, and limited urban centers present in the state. From 2016-2020, nearly 4,000 Vermont residents moved into the County from other counties in the state, 2,700 moved into the County from out of state, and 1,200 moved from another country³.



DIVERSITY

In 2013, about 90% of the total population was considered white (non-Hispanic). In 2021, that number dropped to 83%, with multi-racial, Asian, and Black or African American being the second, third, and fourth largest ethnic groups in that order⁴.



EDUCATION

The City of Essex Junction's educational attainment level is above the state average. The share of residents with a bachelor's degree or higher was nearly 49% in 2022 as compared to the state average of 44%⁵.



INCOME

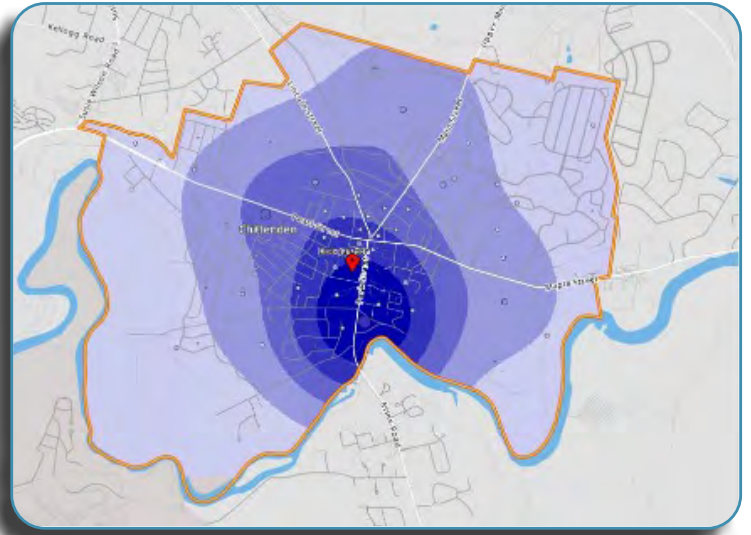
The median household income in the City of Essex Junction was \$92,589 in the 2022 American Community Survey, above the State median of \$73,991. By family type, the median income for families was \$113,776, married-couple families was \$123,627 and non-family household were \$46,741. Poverty is generally the same with the state at 10.3%⁶.



1. 2020 Census
2. 2022 American Community Survey
3. Census Flow Mapper, 2016-2020
4. 2022 American Community Survey
5. 2022 American Community Survey
6. 2022 American Community Survey

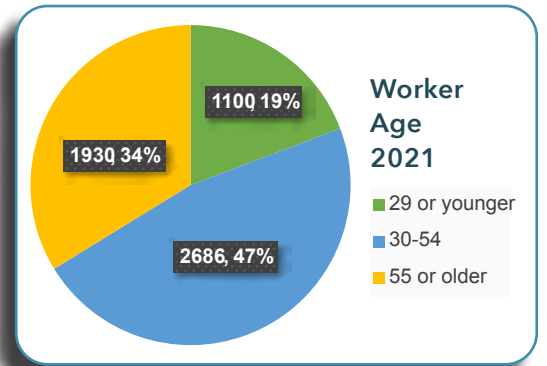
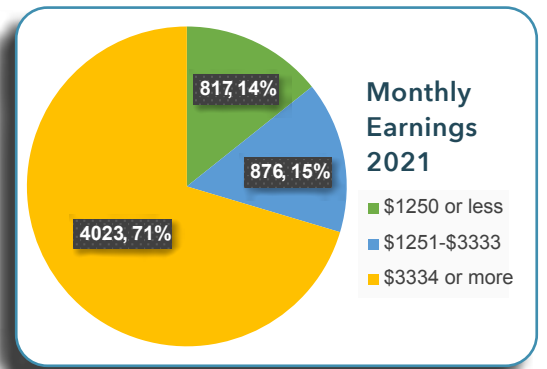
1.1 | WORKFORCE PROFILE

The workforce profile gives the City of Essex Junction a snapshot of its workforce demographics and provides a baseline of understanding where workers are working along with the key facts about workers in the city. The darker blue shaded area represents the concentration of jobs within the city with subsequent shades indicating fewer jobs the farther away it is from the city center.



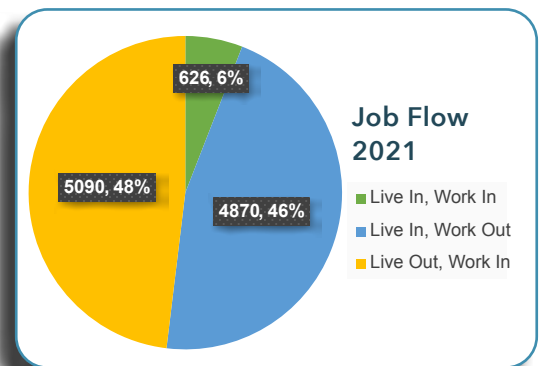
WORKER DEMOGRAPHIC DATA

This component of the workforce profile reviews the number of employees that migrate in and out of the city for work. It describes the impact the surrounding area has on the city in terms of employment opportunities and often describes the necessity of taking a regional approach to workforce development, particularly in larger metro areas.



DataInsight

- Of the total job count in the city, most of the jobs are higher wage earning with the nearly 2/3 of the workforce being younger than 54. This dataset comports with the earlier data on the City of Essex Junction having a younger population on average.
- Nearly half of the city leaves the area for work while another half comes into the city for work. Very few, 11%, both lives and works in the community. This confirms the bedroom community model and shows how important a regional workforce is to the City of Essex Junction.





1.2 | HOUSING AFFORDABILITY

Housing affordability is a challenge everywhere and it is no different in Vermont. While it is not possible to see specific data on housing affordability for the City of Essex Junction, county data does exist.



HOMEOWNERS

Owner-Occupied Housing Units

42,709

Percent **Moderately-Burdened** Owners = 13.3%

Percent **Severely-Burdened** Owners + 8.4%

Total Percent **Cost-Burdened** Owners = **21.7%**

RENTERS

Renter-Occupied Housing Units

25,437

Percent **Moderately-Burdened** Renters = 25.8%

Percent **Severely-Burdened** Renters + 27.9%

Total Percent **Cost-Burdened** Renters = **53.7%**

0.3 Percentage Points Below the Nationwide Share of Cost-Burdened Owners



4.3 Percentage Points Above the Nationwide Share of Cost-Burdened Renters



Definitions: A household is **cost-burdened** if 30 percent or more (**moderately-burdened** if between 30 and 50 percent and **severely-burdened** if over 50 percent) of household income is spent on housing costs (i.e., gross rent, mortgage or other monthly owner costs).



DataInsight

- There are two stories being told in Chittenden County. As a homeowner, the cost-burden of housing is average to that of the country. As a renter, the cost burden is roughly 4% higher than that of the country. Numerous factors are used as inputs into this calculation including income which may help put downward pressure on homeownership relative to other parts of the country.



2.0 | BENCHMARKING PEER COMMUNITIES

The City of Essex Junction presents a distinctive set of strengths, weaknesses, opportunities, and threats that shape its character and development. One of its primary strengths lies in the strong sense of community, fostering a tight-knit environment that appeals to residents. The city benefits from a balanced mix of residential and commercial spaces, creating a self-sustaining ecosystem. The proximity to Burlington, a cultural and economic hub, provides access to additional amenities, enhancing the overall quality of life.

The cost of living in the City of Essex Junction, although reflective of the state's general trend, might be considered a weakness, potentially limiting its appeal. Despite the city's vibrant community, cultural and recreational opportunities compete with the larger urban centers and peer communities. Many of the residents live in the City of Essex Junction and work elsewhere creating competition for workforce throughout the region.

Opportunities for the City of Essex Junction lie in its potential for controlled and sustainable growth.

The city can leverage its proximity to Burlington and the broader Vermont region to attract businesses and talent, fostering economic development. Investing in cultural and recreational infrastructure could enhance the city's competitive appeal, making it a destination not just for its proximity to larger centers but for its unique offerings. Its younger and more highly educated population suggests untapped capacity for economic growth and strategic positioning.

However, the City of Essex Junction faces threats that need careful consideration. Building capacity and investing in infrastructure to accommodate the bedroom community methodology will continue to be a challenge. Additionally, the rising cost of living poses a threat to the city's inclusivity and may affect its ability to attract and retain population. When looking at the state's population challenges, the City of Essex Junction is impacted by limited statewide migration from other states or abroad.

Benchmarking oneself against peer communities is crucial for various reasons as it provides a valuable framework for assessing performance, identifying strengths and weaknesses, and fostering opportunities for improvement. By comparing key indicators such as economic development, quality of life, infrastructure, and public services with similar communities, individuals, businesses, and local governments gain insights into their relative standing.

One measure being used for an economic comparison is the Innovation Capacity Profile of the peer communities.

This indexing system, supported by the Economic Development Administration (EDA), measures the overall health of a county's economy by weighing different business and community factors. This allows us to benchmark each county with one another, highlighting its relative strengths and weaknesses. The index is built using five categories:

1. Human Capital and Knowledge Creation
2. Business Dynamics
3. Business Profile
4. Employment and Productivity
5. Economic Well-Being





2.1 | BENCHMARK - METRO & WORKFORCE FACTORS

The metro area surrounding Burlington scores relatively high when compared to peer metro areas in the country. In the indexes measured, the following are the relative strengths for the area:

HUMAN CAPITAL AND KNOWLEDGE CREATION INDEX

Education attainment is what drives this particular index. The metro area ranks 14th in bachelor degree attainment and 27th in graduate degree attainment. This is near the top of the pack for the country.



BUSINESS DYNAMICS INDEX

The metro area is in the middle of the pack here with higher scores in high tech business establishment ratios and low traded sector failure ratios.

BUSINESS PROFILE INDEX

Scoring in the middle of the pack, this index is supported by having a relatively high degree of industrial diversity and high average venture capital agreements.



EMPLOYMENT AND PRODUCTIVITY INDEX

Perhaps the lowest scoring index overall for the area, this measure is supported by having a moderate degree of patent diversity and a positive change in the patenting rate.

ECONOMIC WELL BEING INDEX

The metro area has a high degree of living standards with a relatively low unemployment rate along with strong growth in broadband adoption.



Burlington-South Burlington, VT (Metro)

Population: **225,745** Per Capita Income: **N/A** Largest City: **Burlington**

Innovation Intelligence Index

131.8

Rank: **75**



The graph above, and the similar graphs below, show the distribution of index values for all counties. The value for Burlington-South Burlington, VT (Metro) is highlighted in red.

This area has **moderate** relative Innovation Capacity. The Innovation Index incorporates statistical data from a wide variety of sources. Review the indexes below to learn more about how this number was determined.



2.2 | BENCHMARK - ST. ALBANS

KEY DEMOGRAPHICS

The City of Essex Junction and St. Albans, Vermont share similarities in their picturesque New England charm and close proximity to natural beauty. Both are situated in the northwestern part of the state, providing residents and visitors with access to the stunning landscapes for which Vermont is renowned.

Despite these similarities, there are notable differences between the City of Essex Junction and St. Albans. The City of Essex Junction, a suburb of Burlington, has a young and vibrant community. The city is home to businesses, educational institutions, and recreational facilities, making it a hub for both residential and commercial activities. In contrast, St. Albans, has a more laid-back and rural atmosphere. St. Albans is situated on the shores of Lake Champlain and is recognized for its waterfront area, offering a different lifestyle that emphasizes outdoor activities and a connection to the natural environment.

CITY OF ESSEX JUNCTION

Total Population	10,590
Median Household Income	\$92,589
Bachelor's Degree or Higher	48.9%
Employment Rate	58.2%
Total Housing Units	4,789
Without Health Care Coverage	5.5%
Total Households	4,604
Hispanic or Latino (of any race)	276

ST. ALBANS CITY

Total Population	6,877
Median Household Income	\$49,736
Bachelor's Degree or Higher	25.0%
Employment Rate	57.4%
Total Housing Units	3,258
Without Health Care Coverage	3.4%
Total Households	2,862
Hispanic or Latino (of any race)	180

KEY SIMILARITIES & DIFFERENCES

1. Both communities are relatively affordable communities in the State.
2. Both communities have relatively easy access to Vermont's outdoor recreational opportunities.
3. St. Albans is perceived as a waterfront retreat community in a more rural setting.



2.3 | BENCHMARK - WILLISTON

KEY DEMOGRAPHICS

Both the City of Essex Junction and Williston have family-friendly vibes, with well-regarded schools and safe neighborhoods fostering a strong sense of community. Affordability also plays a familiar role, with both offering relative comparable cost of living conditions when considering Vermont as a whole. Residents of the City of Essex Junction and Williston also enjoy the benefits of being part of the greater Burlington metropolitan area, with convenient access to cultural amenities, educational institutions, and economic opportunities.

The City of Essex Junction, nestled just outside Burlington, is arguably more urbanized. Its convenient access to major highways and the city's vibrancy makes it balanced between urban and suburban. In contrast, Williston has a more suburban and rural character, offering a quieter lifestyle with a focus on natural surroundings. Williston is recognized for its open spaces, parks, and agricultural areas, providing a more tranquil living environment while still being close to the amenities of Chittenden County.

CITY OF ESSEX JUNCTION

Total Population	10,590
Median Household Income	\$92,589
Bachelor's Degree or Higher	48.9%
Employment Rate	58.2%
Total Housing Units	4,789
Without Health Care Coverage	5.5%
Total Households	4,604
Hispanic or Latino (of any race)	276

WILLISTON

Total Population	10,103
Median Household Income	\$99,664
Bachelor's Degree or Higher	55.8%
Employment Rate	67.7%
Total Housing Units	4,484
Without Health Care Coverage	2.4%
Total Households	4,254
Hispanic or Latino (of any race)	223

KEY SIMILARITIES & DIFFERENCES

1. Both communities are part of the Burlington Metro Area and are influenced by the urban center.
2. Both communities are very similar on key demographics with small marginal differences.
3. Williston has an older median age at nearly 44 years old and is generally older in many other census categories.
4. Median sold home price in Williston is higher than that of Essex Junction.



»»»» 2.4 | BENCHMARK - WINOOSKI

KEY DEMOGRAPHICS

The City of Essex Junction and Winooski each contribute to the region’s unique character. Both share a commonality in their location, nestled in the Burlington metropolitan area, and are part of the greater Chittenden County community. The proximity to Burlington ensures that residents in both the City of Essex Junction and Winooski have access to cultural events, educational institutions, and economic opportunities.

The City of Essex Junction and Winooski exhibit notable differences. The City of Essex Junction, as a more established and suburban city, is known for its diverse community and serves as a hub for commercial and residential activities. On the other hand, Winooski, with its smaller size and distinct urban character, is celebrated for its unique blend of history and modern development. Winooski has undergone revitalization in recent years, transforming its downtown area into a vibrant community space with eclectic dining options and a focus on the arts.

CITY OF ESSEX JUNCTION

Total Population	10,590
Median Household Income	\$92,589
Bachelor’s Degree or Higher	48.9%
Employment Rate	58.2%
Total Housing Units	4,789
Without Health Care Coverage	5.5%
Total Households	4,604
Hispanic or Latino (of any race)	276

WINOOSKI

Total Population	7,997
Median Household Income	\$69,783
Bachelor’s Degree or Higher	55.9%
Employment Rate	76.3%
Total Housing Units	4,027
Without Health Care Coverage	5.1%
Total Households	3,688
Hispanic or Latino (of any race)	247

KEY SIMILARITIES & DIFFERENCES

1. Both communities are part of the Burlington Metro Area and are influenced by the urban center.
2. Winooski is smaller with lower median income, fewer households, but higher levels of education and diversity per capita.
3. Both communities have comparable property and real estate values.
4. Perceptually, Winooski portrays a more eclectic urban scene while the City of Essex Junction settles on a more suburban setting.



»»»» 2.5 | BENCHMARK - SOUTH BURLINGTON

KEY DEMOGRAPHICS

The City of Essex Junction and South Burlington share some similarities while maintaining distinct characteristics that shape their individual identities. Both communities benefit from their location in the Burlington metropolitan area, providing residents with access to cultural events, educational institutions, and economic opportunities. Additionally, residents of both the City of Essex Junction and South Burlington benefit from proximity to Lake Champlain, offering recreational opportunities.

South Burlington, as a larger and more populous city, has a more urban character with a greater concentration of commercial and retail developments. South Burlington is also home to the Burlington International Airport and the University of Vermont Medical Center, contributing to its role as a regional economic center. The differences in their size, urbanization, and economic roles contribute to the differences between the two.

CITY OF ESSEX JUNCTION

Total Population	10,590
Median Household Income	\$92,589
Bachelor's Degree or Higher	48.9%
Employment Rate	58.2%
Total Housing Units	4,789
Without Health Care Coverage	5.5%
Total Households	4,604
Hispanic or Latino (of any race)	276

SOUTH BURLINGTON

Total Population	20,292
Median Household Income	\$90,410
Bachelor's Degree or Higher	63.0%
Employment Rate	70.2%
Total Housing Units	9,650
Without Health Care Coverage	2.6%
Total Households	8,783
Hispanic or Latino (of any race)	687

KEY SIMILARITIES & DIFFERENCES

1. Perhaps less different than on the key census indicators than once would expect, South Burlington plays a larger regional and state role than the City of Essex Junction.
2. With proximity to Burlington, South Burlington is the second city of sorts in the MSA.
3. The City of Essex Junction benefits from a suburban feel when compared to the urban center of South Burlington.
4. Housing and property values are significantly higher in South Burlington than in the City of Essex Junction.



3.0 | COMPARATIVE ANALYSIS-PEER COUNTIES

A comparative analysis examines two or more subjects, focusing on their similarities and differences. This meticulous investigation delves into their characteristics, features, and potential outcomes, providing a deeper understanding and facilitating evaluation. Ultimately, the analysis allows for informed decision-making based on the comprehensive comparison. In this case, the peer counties were studied, and trends were identified. The following are highlighted trends in the analysis.

1. THE POPULATION AND URBANIZATION LEVEL OF THE COMMUNITIES VARY.

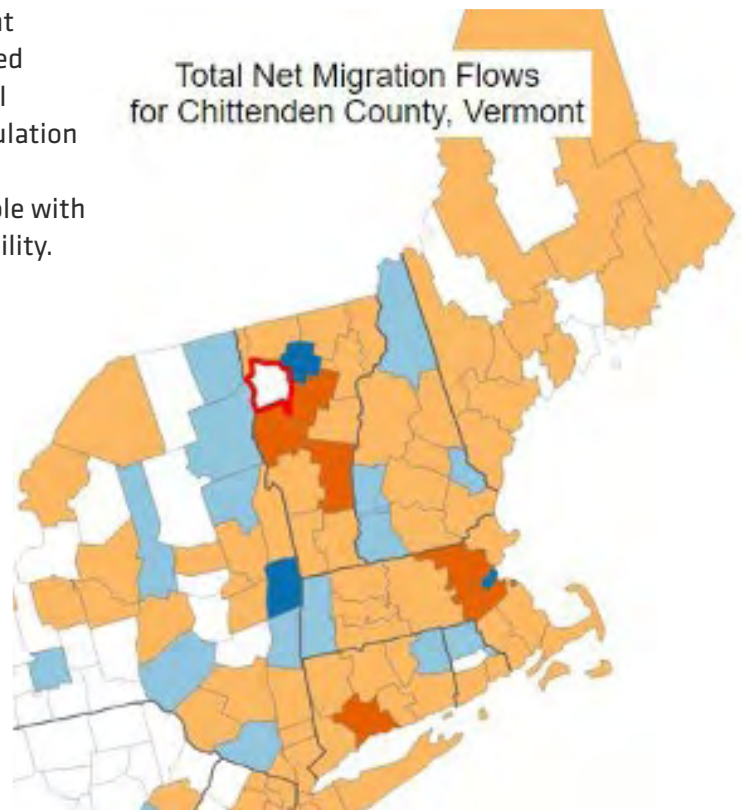
While they all are impacted by the center of gravity of Burlington, they are each impacted by its relative geographical proximity to it. The region shares similar characteristics having some of the highest levels of education achievement, stronger economic and community wellbeing scores, along with greater degrees of economic dynamism that makes them attractive places to live.



2. PERHAPS UNIQUE TO THIS AREA IS THE MORE TRADITIONAL MOVEMENT FROM RURAL PARTS OF VERMONT AND OTHER RURAL COUNTIES ACROSS THE NORTHEAST TO THE URBAN CENTERS.

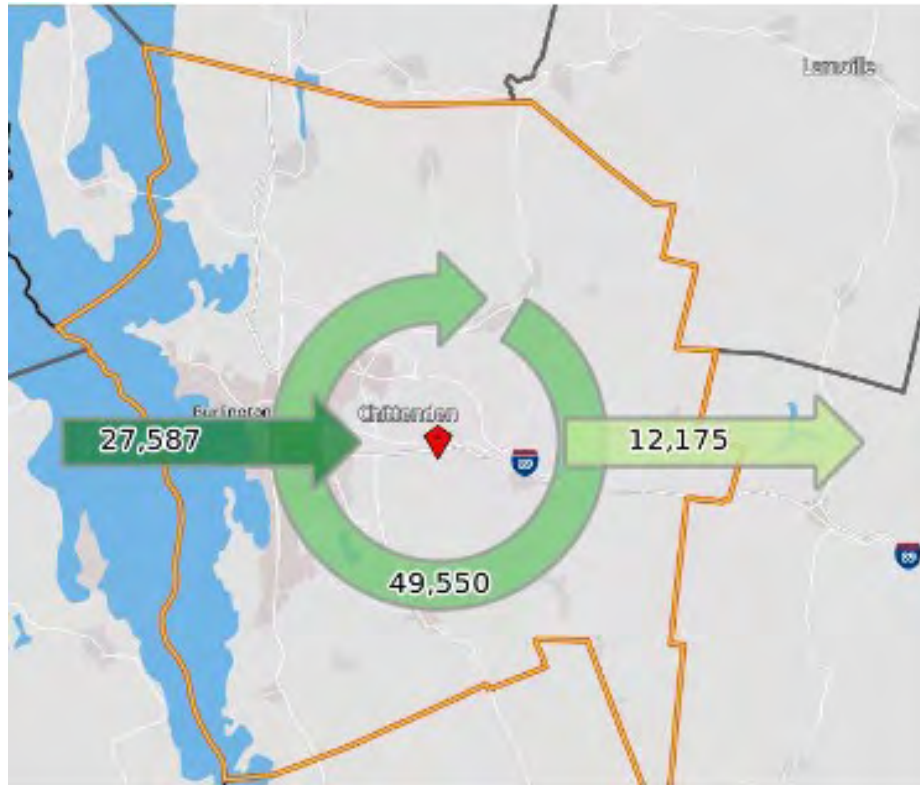
Across the country, data shows an increase in movement out of the urban cores to more rural settings likely caused by numerous factors. This data does not capture the full impact of COVID-19, but it does suggest that larger population stagnation and decline in the state may be a factor in intrastate migration. The types of job may also play a role with a larger manufacturing base limiting geographical flexibility.

Total Net Migration Flows for Chittenden County, Vermont



3. REGIONALLY, THE GREATER BURLINGTON AREA HAS A HIGH DEGREE OF ECONOMIC VARIATION AND STRENGTH.

It is quite clear from the indexes that this is an economic powerhouse when compared to other parts of the country. The largest region wide employment NAICS industry sectors are healthcare and social assistance at 20%, retail at 14%, and both manufacturing and Professional/Scientific at 11.5%. Measured by the inflow and outflow job counts, the regional economic influence on the area is unmatched with nearly 35% of workers coming into the area for work while the remaining 65% both live and works in the region. Just a small number, less than 20% migrate out of the region for work.



4. HOUSING AFFORDABILITY IS A CHALLENGE ALL OVER THE COUNTRY.

Each jurisdiction is trying to find the right model that works to address the issue. When reviewed comparatively, the region is hovering right at or somewhat above the national cost burden average. When looking at housing prices in comparison to median income it becomes somewhat clear that higher wages are putting downward pressure on relatively average housing prices. The higher wages are keeping the cost burden within average ranges which is unique to this region.





4.0 | ACKNOWLEDGEMENTS

A Steering Committee was formed to help guide this project. We would like to acknowledge the Steering Committee members.



STEERING COMMITTEE MEMBERS

Andrew Brown

Emily Hagan-Howe

Marcus Certa

Brad Luck

Cristin Gildea

Chris Yuen

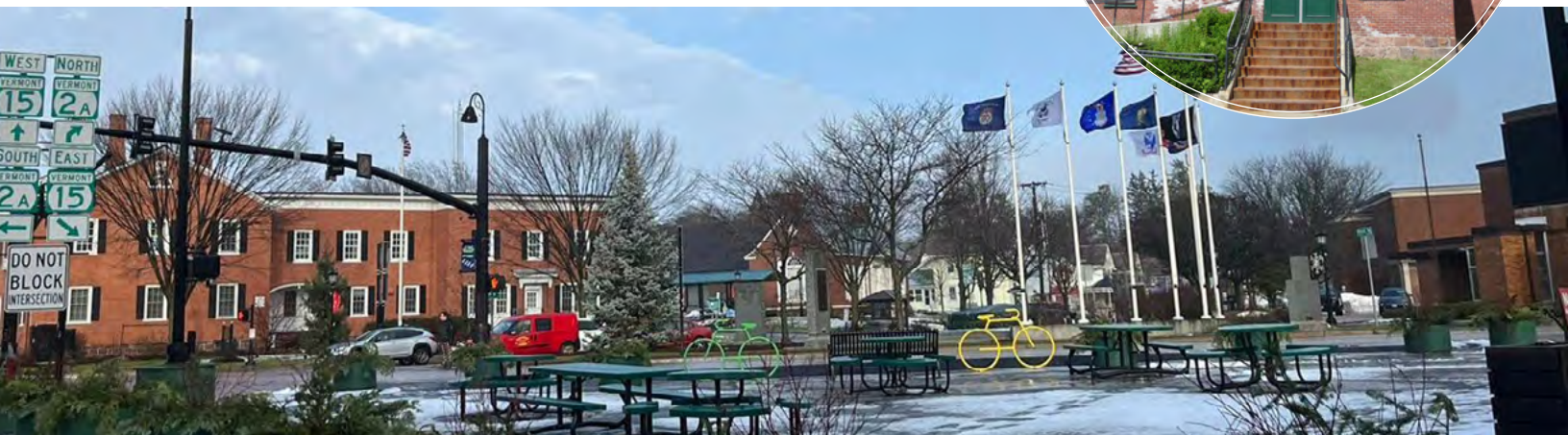
Tacy Lincoln

Regina Mahony

Scott McCormick

Community members and stakeholders have engaged in this community visioning and strategic action planning process with great enthusiasm. Their passion and interest have ensured discussions are open, thoughtful, and reflective of the myriad of perspectives that exist within the City of Essex Junction. This dedication is also reflective of the deep commitment participants have to the future of the city.

Additionally, appreciation is extended to Ashley Snellenberger and the team at the City of Essex Junction who provide the local expertise that helps guide this project. Their time and dedication are greatly appreciated.





»»»» 5.0 | FOR MORE INFORMATION

This initiative is focused on planning for the future of the City of Essex Junction. It is exploring where and how the city can fit into a rapidly changing world, looking out to 2035. The result will be a shared Community Vision and Strategic Action plan, that will contain an initial implementation roadmap looking out to 2035 – with actions – to move toward the shared vision for the city.

For more information on the City of Essex Junction Community Vision and Strategic Action Plan project please contact:

ASHLEY SNELLENBERGER

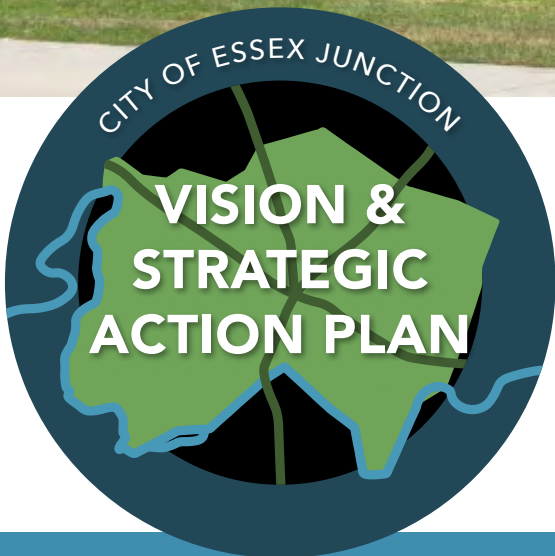
Communications & Strategic Initiatives Director
City of Essex Junction
802.878.6944 EXT: 1601
ASnellenberger@essexjunction.org

DAVID BEURLE

Chief Executive Officer
Future iQ
612-757-9190 | david@future-iq.com

Please stay connected to the collaborative regional planning initiative at:
lab2.future-iq.com/essex-junction-visionstrategic-action-plan/





THE CITY OF ESSEX JUNCTION COMMUNITY
VISION & STRATEGIC ACTION PLAN

BENCHMARK REPORT

VERMONT, USA

JANUARY 2024