

July 2023



Town of Valdese Creating Outdoor Recreation Economies Strategic Plan

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Acknowledgements

The Creating Outdoor Recreation Economies (CORE) program is made possible by a U.S. Economic Development Administration State Tourism Grant which awarded \$6 Million to the State of North Carolina's Supporting and Strengthening Resiliency in North Carolina's Travel, Tourism, and Outdoor Recreation Sectors Initiative. As a component of this Initiative, the North Carolina Department of Commerce's Rural Economic Development Division (REDD) developed the CORE program. The CORE program offers strategic planning and technical assistance to help rural communities leverage North Carolina's abundant outdoor recreation assets to bolster local economic vitality.



The REDD announced the technical assistance program offering Outdoor Recreation Economy Strategic Planning and Asset Development services in late 2022. Communities from across the state applied to engage with strategic planning services and 34 local governments were accepted to participate. Main Street & Rural Planning staff, who is responsible for facilitating strategic economic development planning and implementation services, worked with local government staff to communicate the goals of the program, identify local opportunities, and assemble a planning work group.

**Town of Valdese
Town Council**

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Plan Adoption

Valdese Town Council – July 10, 2023

Executive Summary

Through the CORE program, the Town of Valdese collaborated with Rural Economic Development Division staff and local stakeholders through a strategic planning process to identify and develop outdoor recreation assets that present economic growth opportunities. Strategy development focuses on leveraging outdoor recreation assets to increase tourism, encourage small business development, enhance quality of life for residents, plan for outdoor recreation asset and infrastructure development, and position communities to grow and attract outdoor gear manufacturing industries. The planning process is tailored to meet the specific needs, goals, and opportunities that are identified by local leaders and stakeholders.

The plan makes recommendations on Strategies, Goals, Objectives, and Actions that local stakeholders can take to help increase economic vitality through leveraging their community's outdoor recreation assets.

The plan makes a total of 29 recommendations under 3 priority areas. These priority areas, identified by the local work group, include:

1. **Parks, Trails, and Facilities:** *To provide and maintain a variety of recreation amenities that improve quality of life and encourage a sense of community for residents and visitors.*
2. **Communication and Activation:** *Promote and educate residents and visitors about the community's recreation amenities.*
3. **Economic Impacts:** *Utilize the community's outdoor assets to improve the downtown, local and regional economies.*

These recommendations should serve as guideposts for the Town of Valdese as it considers future development efforts and should work in collaboration with other planning efforts undertaken by the town and related jurisdictions.

Background

Economic Impact

Outdoor recreation activity and associated expenditures generate a large economic impact. This is a broad economic sector that comprises a diverse range of industries including manufacturing, retail, arts, entertainment, and recreation, as well as many supporting activities such as construction, travel and tourism, accommodation and food service, and many more.

Nationwide, in 2021 the outdoor recreation economy represented \$454.0 billion in current-dollar gross domestic product (GDP), or 1.9 percent of the United States' total GDP. The outdoor recreation sector of the economy is growing at a faster rate than the overall economy. In 2021, "Inflation-adjusted ("real") GDP for the outdoor recreation economy increased 18.9 percent in 2021, compared with a 5.9 percent increase for the overall U.S. economy, reflecting a rebound in outdoor recreation after the decrease of 21.6 percent in 2020. Real gross output for the outdoor recreation economy increased 21.7 percent, while outdoor recreation compensation increased 16.2 percent and employment increased 13.1 percent." Employment in the outdoor recreation industry increased in all 50 states during 2021.¹

In 2021 outdoor recreation contributed \$11,836,649,000 in total value-added economic impact to **North Carolina's** GDP. North Carolina ranked as the 11th highest state in "Value-Added Outdoor Recreation in Total outdoor recreation activities" in 2021. This included employment for over 130,000 individuals that resulted in over \$5.9 Billion in total compensation. Employment in key industries within the outdoor recreation sector includes over 8,000 in manufacturing, 44,000 in retail, 27,000 in accommodation and food service, and over 23,000 in arts, entertainment, and recreation.²

Outdoor Recreation Participation

According to the 2022 Outdoor Industry Association 'Outdoor Participation Trends Report', "outdoor participation continues to grow at record levels. More than half (54%) of Americans ages 6 and over participated in at least one outdoor activity in 2021, and the outdoor recreation participant base grew 2.2% in 2021 to 164.2M participants. This growing number of outdoor participants, however, did not fundamentally alter long-term declines in high frequency or 'core' outdoor participation."³

Studies show that approximately 56% of North Carolinians participate in some form of outdoor recreation each year. This includes more than 22.8 million visitors to North Carolina

¹ U.S. Department of Commerce, Bureau of Economic Analysis. Outdoor Recreation Satellite Account, U.S. and States, 2021. <https://www.bea.gov/news/2022/outdoor-recreation-satellite-account-us-and-states-2021>

² U.S. Department of Commerce, Bureau of Economic Analysis. Outdoor Recreation Satellite Account, U.S. and States, 2021. <https://www.bea.gov/news/2022/outdoor-recreation-satellite-account-us-and-states-2021>

³ Outdoor Industry Association. 2022 Outdoor Participation Trends Report. <https://outdoorindustry.org/resource/2022-outdoor-participation-trends-report/>

State Parks in 2021 — three million more than any other year on record. Many other public parks, national forests, and other recreation areas report increased visitation as well. These numbers represent a solid base of individuals participating in outdoor recreation and contributing to the associated economic opportunities.

There is still room to engage more individuals and continue to increase participation in outdoor recreation, particularly among demographic populations that have not historically participated in outdoor recreation at levels comparable to others.

Also, people increasingly want outdoor recreation opportunities that are convenient to where they live so they can participate on a regular basis without the need to travel long distances to visit recreation destinations outside of their home communities.



Photo 1: Fountain at Centennial Park in Downtown Valdese

Existing Plans Review

In preparation for the Town of Valdese CORE project, NC Commerce staff requested that project leads share any other relevant plans or documents for review. The following documents were reviewed and considered during the CORE planning process.

Comprehensive Economic Development Strategy

The Town of Valdese is located within the Western Piedmont Council of Governments (WPCOG) Economic Development District (EDD). The WPCOG EDD's 2022 Comprehensive Economic Development Strategy (CEDS) indicated that existing outdoor amenities are an opportunity for the region. Under Infrastructure Strategy 5, the plan states the intent to "Promote water and air quality initiatives, erosion mitigation, contaminants and management of water resources to protect drinking water sources, **support the outdoor economy**, and encourage climate resiliency." Further, the plan includes strategies to improve and expand the bicycle and pedestrian network in the region, promote and market regional attractions and natural resources, promote healthy living initiatives, create robust downtowns, support small business development, and assist partners with expanding and recruiting businesses in the region.

Comprehensive Parks and Recreation Plan

The Town of Valdese completed and adopted a Comprehensive Parks and Recreation Plan in April 2013 with assistance from the WPCOG. This plan looked at traditional parks and recreation programs and facilities in the town and made recommendations for needed updates and improvements. Public input into new and existing services was taken into consideration via a community survey and working sessions with the Town of Valdese Parks and Recreation Commission. The plan also made recommendations for future parks facilities including a downtown park and a park along Lake Rhodhiss.

Comprehensive Pedestrian Plan

In 2018, the Towns of Valdese and Rutherford College jointly received funding and assistance from the North Carolina Department of Transportation (NCDOT) to create a comprehensive pedestrian plan for people who walk in Rutherford College and Valdese (WalkRCV). This plan considered how the two towns could become "walkable communities with connected sidewalks and off-road pathways that allow their citizens safe, pedestrian access within and between the towns." The plan took into account public opinion through use of a steering committee, public meetings and outreach, and a public input survey. The plan reviewed existing sidewalks and greenways, traffic patterns and safety data, and local ordinances to make recommendations for additional connections and walkways.

Valdese Lakeside Park Master Plan

In 2018, the Town of Valdese secured public and private funding to acquire a 302 acre tract of land along Lake Rhodhiss in order to develop a regional park with lake access. This purchase fulfilled a goal set out by the 2013 Comprehensive Parks and Recreation Plan. The town then engaged the firm Destination by Design (DBD) of Boone to create a masterplan for the park project. The plan was completed in three phases with broad community input. Ultimately, DBD developed a variety of recommendations for park activities, design, and implementation that included lake access for kayaking, canoeing, and fishing, hiking and mountain biking trails, open green space for community gathering, and more. The plan was completed in March 2019.



Photo 2: Signage at the Entrance to Valdese Lakeside Park

Additionally, Friends of Valdese Rec published the Valdese Lakeside Park Economic Impact Report in May 2023. This report detailed the estimated the annual number of visitors to the park as well as the impacts of spending directly related to these visitors.



Setting

The Town of Valdese (pop. 4,689) is located in eastern Burke County. The town sits approximately 7.6 miles to the east of the City of Morganton (pop. 17,474) and 13.8 miles to the west of the City of Hickory (pop. 43,490). US Highway 70 runs east and west through downtown Valdese and serves as the community's Main Street. Additionally, Interstate 40 runs along the southern edge of the town.

The community boasts proximity to a variety of outdoor assets, the most significant of which may be Lake Rhodhiss which runs for several miles along the northern border of the town. The town-owned, 302-acre Valdese Lakeside Park provides access to the lake for fishing and will soon include a canoe and kayak put-in as well. The park also offers a variety of other activities including hiking and biking trails, a story walk for children, a dog park, and more. Other river access for boating and fishing activities can be found just outside the town boundary at the Castle Bridge and Huffman Bridge access areas.

Valdese is also a crossroads for several planned state and regional trails. The Burke River Trail has some sections completed and will ultimately connect the City of Morganton to the smaller municipalities of Drexel, Valdese, Rutherford College, Connelly Springs, and Hildebran in eastern Burke County.



Photo 3: View of Lake Rhodhiss from Meditation Point at Valdese Lakeside Park

The planned 300 mile Wilderness Gateway State Trail will also connect directly through the Town of Valdese. This trail is planned to extend through five counties from Buncombe County to Catawba County. It will include access to the South Mountains State Park and Game Lands, the Catawba River, and a variety of other outdoor assets for

hiking, biking, horseback riding, and river-based activities. These trails will link Valdese to a network of other state and national trails both planned and existing in the region.⁴

⁴ Heile, B. (2022). *State Trails in Valdese*. Valdese, NC.

Planning Process

Beginning in February 2023, NC Department of Commerce staff met with the Town of Valdese CORE work group for a series of discussion sessions which included topics on local outdoor recreation experiences, small business and entrepreneurship, and the outdoor industry. All meetings were held in-person at Valdese Town Hall.

The Town of Valdese CORE project sought to identify economic drivers in the community related to outdoor recreation and to create a blueprint for economic growth through the development of the town’s outdoor assets and experiences.

During the planning process, the work group identified three primary focus areas with associated goals, objectives, and actions to be taken to continue moving the outdoor economy in Valdese forward.

Throughout the planning process, NC Commerce staff also completed a survey of the work group members, a community-wide outdoor recreation survey, interviews of community stakeholders, demographic and economic data analysis, and a review of prior economic development and outdoor recreation plans for the region.

A full outline of the work group meetings can be seen in the table below.

Town of Valdese CORE Work Group Meetings

Meeting Date	Topic(s)
February 13, 2023	Meeting #1: <ul style="list-style-type: none"> • Overview of the CORE process • Defining Outdoor Recreation and the OR Economy • Review of Work Group Survey • Understanding Community Assets
March 13, 2023	Meeting #2: <ul style="list-style-type: none"> • Developing an Itinerary • Review of Community Survey • Creating a Vision
April 17, 2023	Meeting #3: <ul style="list-style-type: none"> • Review of Stakeholder Feedback • Review of Vision Statement • Developing Goals for the Work Plan
May 8, 2023	Meeting #4: <ul style="list-style-type: none"> • Developing Objectives and Actions for the Work Plan • Identifying Potential Projects

Work Group Survey

Prior to the first project meeting, the Town of Valdese CORE work group was asked to complete the Primary Planning Group Initial Questionnaire. This survey was designed by the NC Commerce team to identify the priorities and opinions of the local work group. Results of the survey were shared at the first meeting to encourage and guide the initial discussion.

Community Survey

A community-wide survey was conducted as a part of the planning process to gauge community interest in outdoor recreation, opinions of existing and potential outdoor and business assets, economic impacts of outdoor recreation, and local opinions of tourism and community development. The results of this survey were summarized and shared with the local work group at the second meeting.

Stakeholder Interviews

The local project leads provided NC Commerce staff with a list of additional community stakeholders who they felt could positively contribute to the planning project. These individuals represented outdoor recreation participants, local business owners, parks and recreation experts, the faith community, and other fields. NC Commerce staff contacted these individuals and held one-on-one phone conversations to better understand ways in which the town may support growing the outdoor economy. A summary of these conversations was presented to the work group at the third meeting.

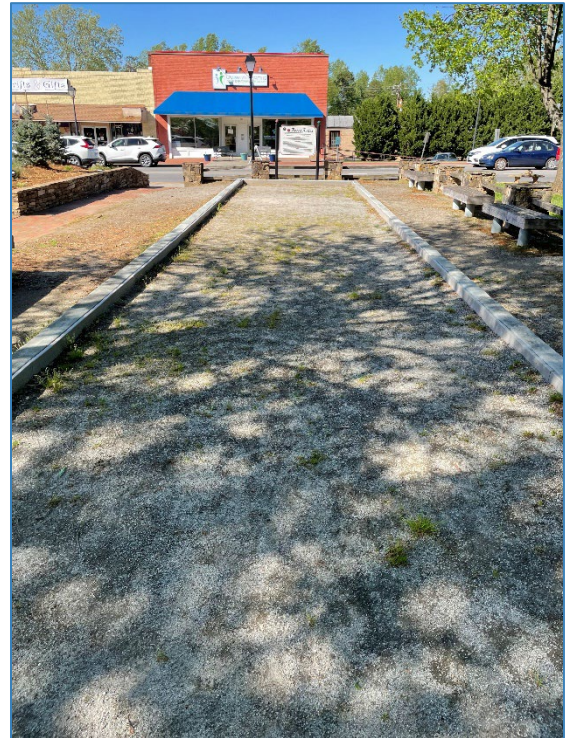


Photo 4: Bocce Court at Centennial Park in Downtown

Additional Research

Along with the methods listed above, the technical team identified and reviewed a variety of demographic and market data sources that were used to influence the final recommendations of this report. A Retail Marketplace Snapshot completed by NC Main Street & Rural Planning staff is attached as an appendix to this document.

Plan Review & Adoption

A draft of this document was produced in June 2023 and shared with the Town of Valdese CORE project local leads for review and comment. Following review, the Valdese Town Council adopted the plan on July 10, 2023.

Vision Statement

Situated along the Catawba River valley, the Town of Valdese offers true small town charm while highlighting the rich culture of its Waldensian heritage. The community blends traditional and nature-based recreation in a unique way and makes available a wide range of activities and experiences. By leveraging its recreation assets, the Town strives to provide a strong sense of community and quality of life amenities for residents and visitors that help to attract, retain, and bolster local businesses and generate positive economic impacts.



Analysis & Recommendations

Parks, Trails, and Facilities

Goal 1: *To provide and maintain a variety of recreation amenities that improve quality of life and encourage a sense of community for residents and visitors.*

Objective 1.1: Update the Town’s Parks & Recreation Comprehensive Plan.

Recommendation 1.1.1: Advocate to the Town Manager and Town Council for the Plan to be updated.

Recommendation 1.1.2: Research options for planning services and funding opportunities.

Recommendation 1.1.3: Assess and prioritize current recreation facilities for needed updates and improvements.

Recommendation 1.1.4: Identify a centralized area for storage of Friends of Valdese Rec volunteer materials and Parks and Recreation materials at Parks and Recreation facilities.

Objective 1.2: Complete the relevant actions for the Valdese Lakeside Park Masterplan.

Recommendation 1.2.1: Continue to work towards the development of the pavilion and mountain bike trails.

Recommendation 1.2.2: Identify a new location for the disc golf course.

Recommendation 1.2.3: Begin work on the overflow parking area.

Objective 1.3: Advocate for and facilitate progress of state and regional trail projects.

Recommendation 1.3.1: Continue partnership with Foothills Conservancy through regular meetings and communication regarding Wilderness Gateway State Trail.

Recommendation 1.3.2: Continue partnership with Western Piedmont Council of Governments through regular meetings and communication regarding Burke River Trail.

Recommendation 1.3.3: Communicate, educate, and promote trail network progress and potential economic impacts with the general public.

Communication and Activation

Goal 2: *Promote and educate residents and visitors about the community's recreation amenities.*

Objective 2.1: Develop a marketing plan for the Parks & Recreation Department.

Recommendation 2.1.1: Communicate with the local business community about Parks and Recreation events, programs, and facilities.

Recommendation 2.1.2: Collaborate with Community Affairs Director on a social media marketing strategy for the Parks and Recreation Department.

Recommendation 2.1.3: Develop promotional materials highlighting Valdese parks and businesses to be distributed to hotels, visitor centers, and other businesses in the Hickory-Lenoir-Morganton metro area.

Recommendation 2.1.4: Utilize VisitNC's promotional tools and research requirements for designation as a Trail Town as a part of their OutdoorNC initiative.

Objective 2.2: Encourage new and repeat participants at Parks and Recreation facilities.

Recommendation 2.2.1: Host demo days and programming at Parks and Recreation facilities to help educate locals and bring new visitors to available activities and amenities.

Recommendation 2.2.2: Develop ready-made marketing materials to share at Parks and Recreation events as well as other town festivals and events.

Recommendation 2.2.3: Host additional music, arts, and other events such as a food truck rodeo at Valdese Lakeside Park to increase visibility and create the reputation of the park as a hub for a variety of activities.

Objective 2.3: Develop a community culture that supports the outdoor recreation economy.

Recommendation 2.3.1: Identify additional opportunities for volunteer programs, such as a volunteer park ranger program, through Friends of the Valdese Rec.

Recommendation 2.3.2: Develop an annual event to spotlight key volunteers and accomplishments.

Recommendation 2.3.3: Continue partnerships with the Burke County School System to engage youth in outdoor activities through clubs and other extracurricular activities.

Recommendation 2.3.4: Continue the cleanup project on Lovelady Road in partnership with the Heritage Middle and Draughn High School Interact Clubs and other community volunteers.

Economic Impacts

Goal 3: *Utilize the community's outdoor assets to improve the downtown, local, and regional economies.*

Objective 3.1: Connect the town parks and outdoor assets to the downtown commercial district via sidewalks, greenways, and other methods.

Recommendation 3.1.1: Identify opportunities for a trolley or shuttle service to transport patrons from parks facilities to the downtown commercial district.

Recommendation 3.1.2: Prioritize completing the sidewalk loop between Laurel Street and Church Street.

Recommendation 3.1.3: Prioritize development of planning and design for town-wide wayfinding signage including gateway signage at main entryways.

Objective 3.2: Capture and analyze the economic impacts of current and future recreation assets.

Recommendation 3.2.1: Collaborate with local, regional, and state economic development organizations, such as Burke Tourism Development Authority, to better understand visitor impacts in Valdese and Burke County.

Recommendation 3.2.2: Conduct intercept surveys at Valdese Lakeside Park and other Town facilities to better understand park use and economic impacts.

Recommendation 3.2.3: Continue partnership with Burke County Building Outdoor Communities project and collaborate on county-wide and regional recreation projects where applicable.

Objective 3.3: Utilize the Town's quality of life amenities and economic impact data for business recruitment efforts.

Recommendation 3.3.1: Collaborate with local economic development partners, such as Burke Development, Inc., the Burke County Small Business Center, and others, to encourage entrepreneurship and business development around needed outdoor recreation amenities, such as bicycle rentals, kayak and canoe rentals, and other opportunities.

Recommendation 3.3.2: Encourage existing businesses to take advantage of outdoor recreation assets through education and communication.

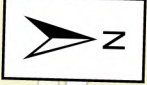


Appendix I

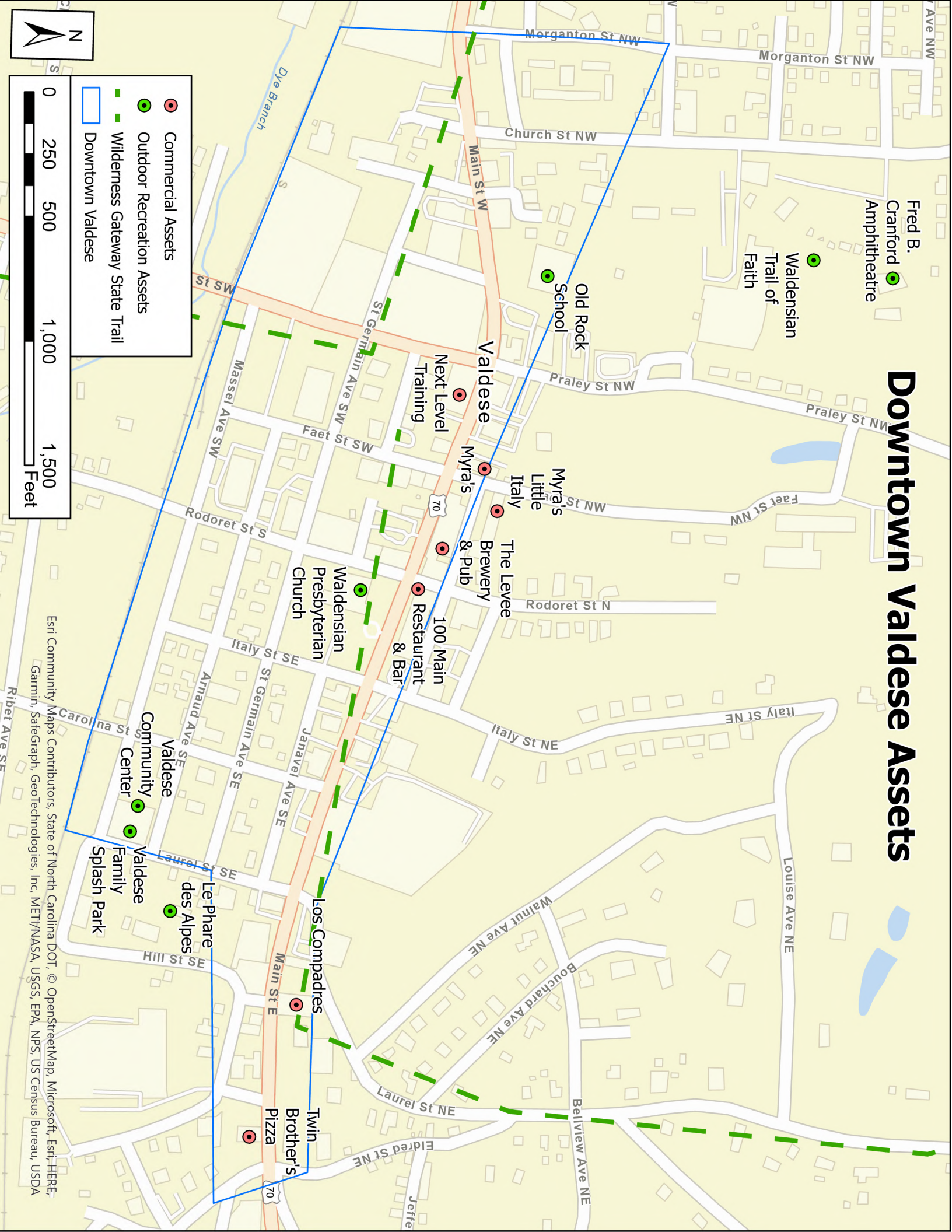
Town of Valdese Asset Mapping

The following maps highlight outdoor recreation assets and related businesses in the Town of Valdese. A community-wide map was created along with a magnification of the downtown district where a number of businesses are clustered.

Downtown Valdese Assets



● Commercial Assets
● Outdoor Recreation Assets
- - - Wilderness Gateway State Trail
 Downtown Valdese

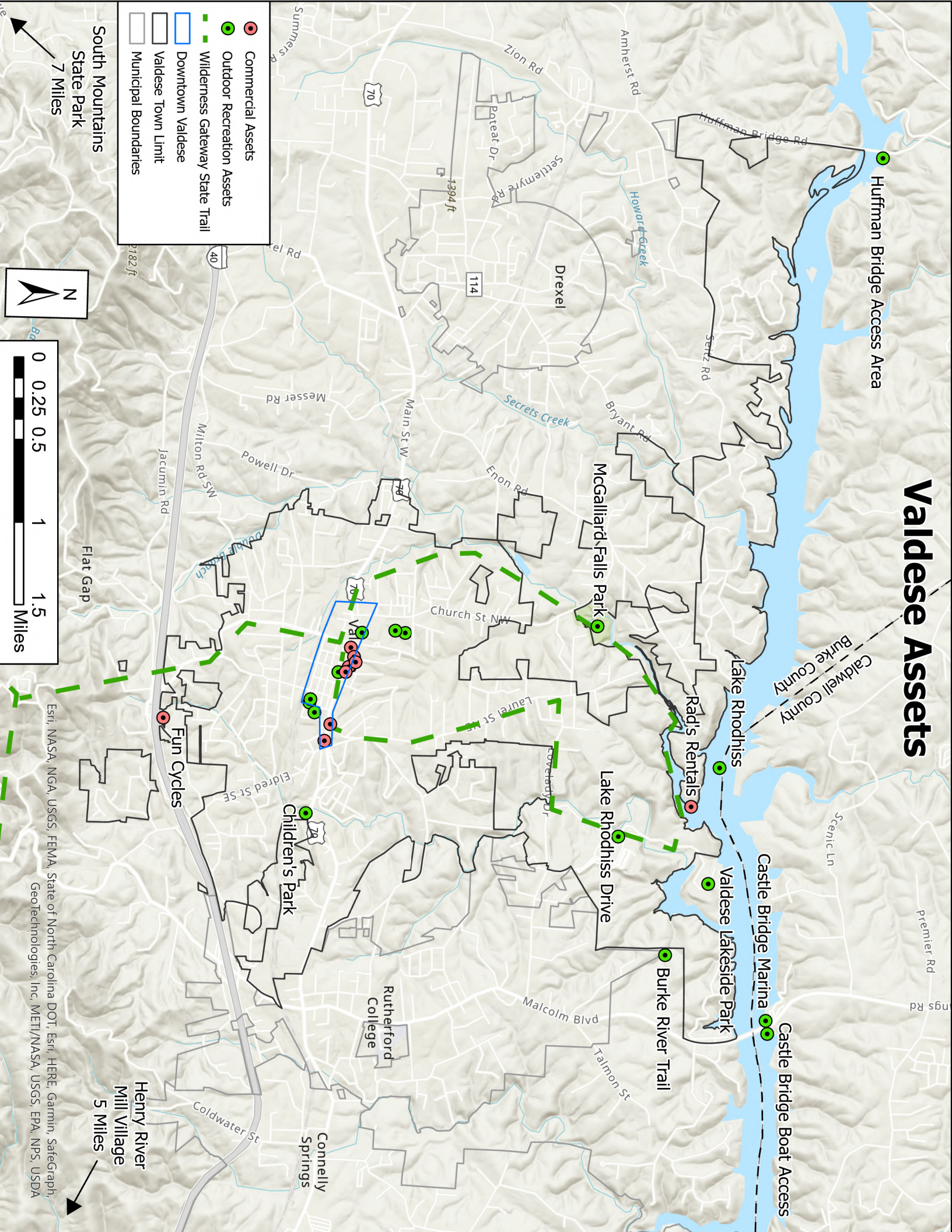


Eri Community Maps Contributors, State of North Carolina DOT, © OpenStreetMap, Microsoft, Esri, HERE, Garmin, SafeGraph, GeoTechnologies, Inc, METI/NASA, USGS, EPA, NPS, US Census Bureau, USDA

Valdese Assets

- Commercial Assets
- Outdoor Recreation Assets
- - - Wilderness Gateway State Trail
- Downtown Valdese
- Valdese Town Limit
- Municipal Boundaries

South Mountains State Park
7 Miles



Henry River Mill Village
5 Miles

Esri, NASA, NGA, USGS, FEMA, State of North Carolina DOT, Esri, HERE, Garmin, SafeGraph, GeoTechnologies, Inc, METI/NASA, USGS, EPA, NPS, USDA

Appendix II

Town of Valdese CORE Community Survey

As a part of the CORE process, a survey was conducted to determine the opinions of Valdese citizens and workers on outdoor recreation and associated economic impacts in the community.

OUTDOOR RECREATION COMMUNITY SURVEY

Town of Valdese



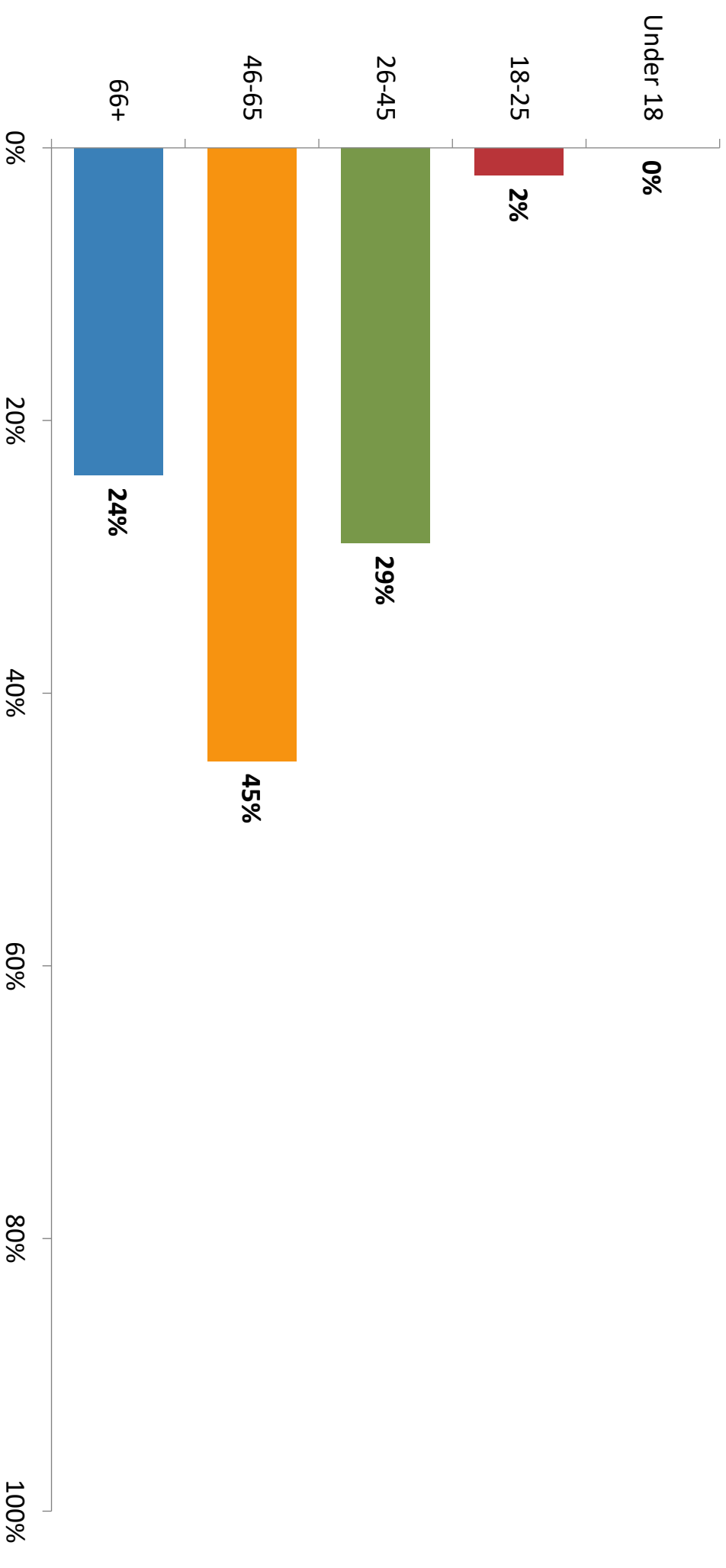
NORTH CAROLINA
DEPARTMENT of
COMMERCE

Why a survey?

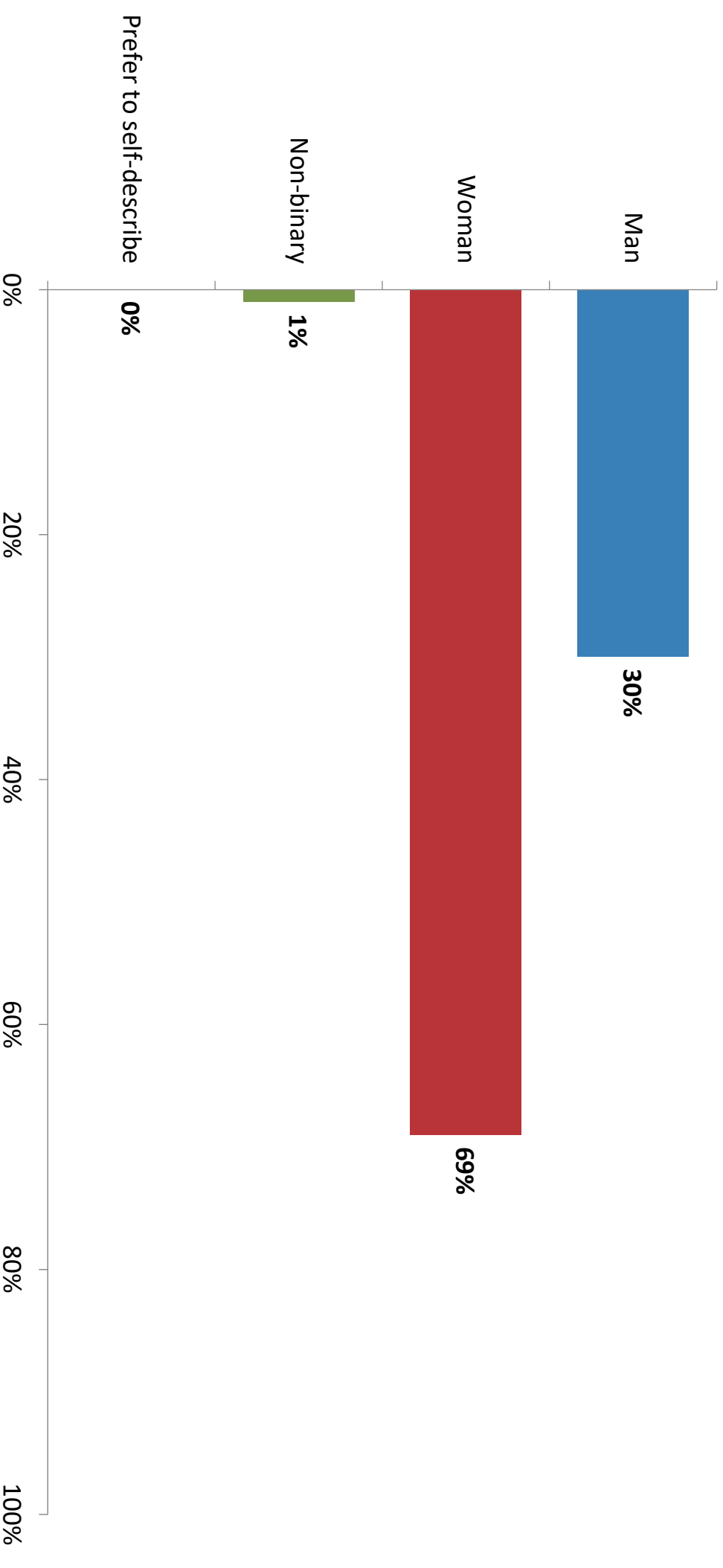
- What does outdoor recreation mean for the community?
- How does it compare to the work group's goals?

114 Responses

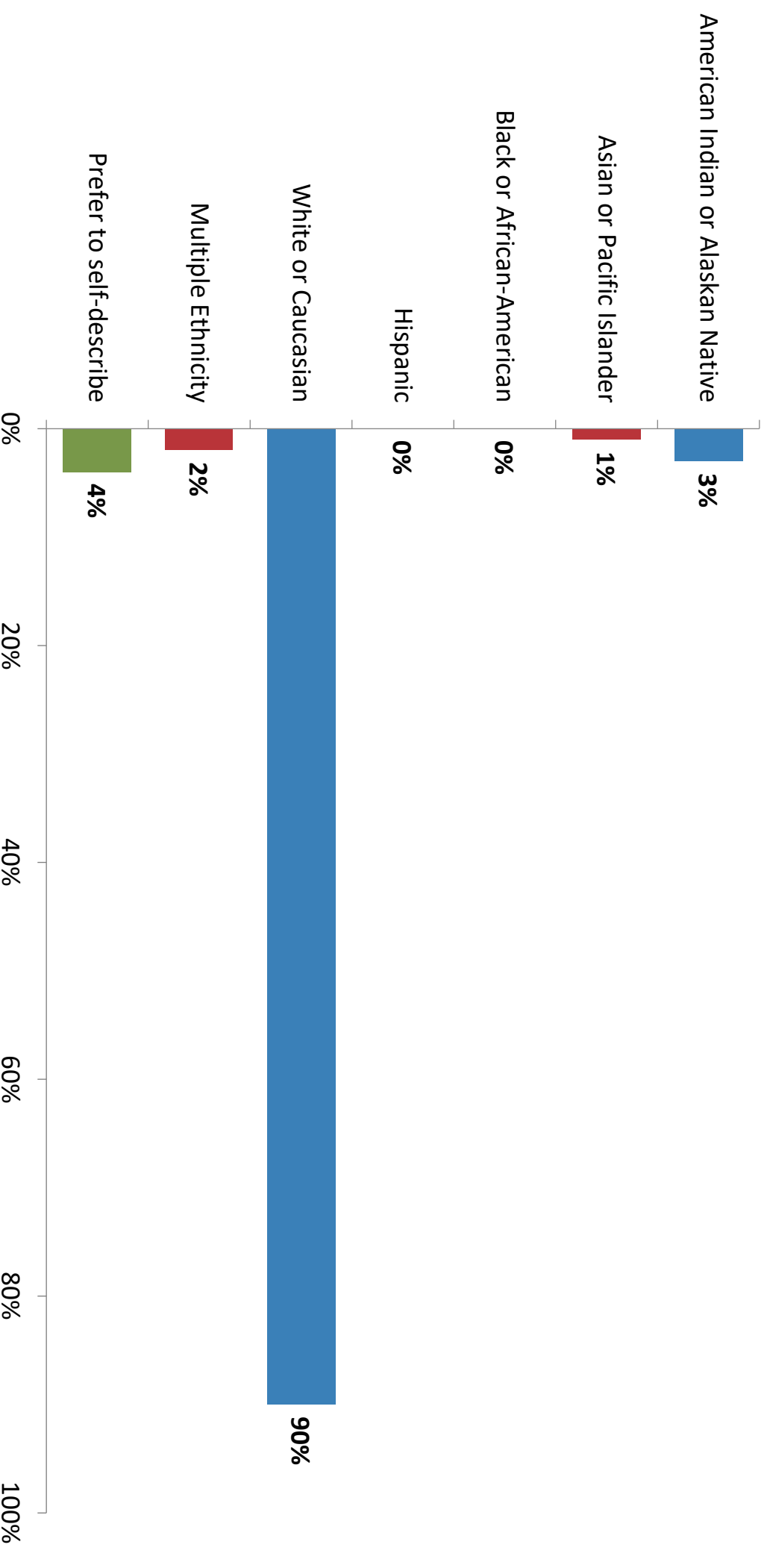
Demographics: Age



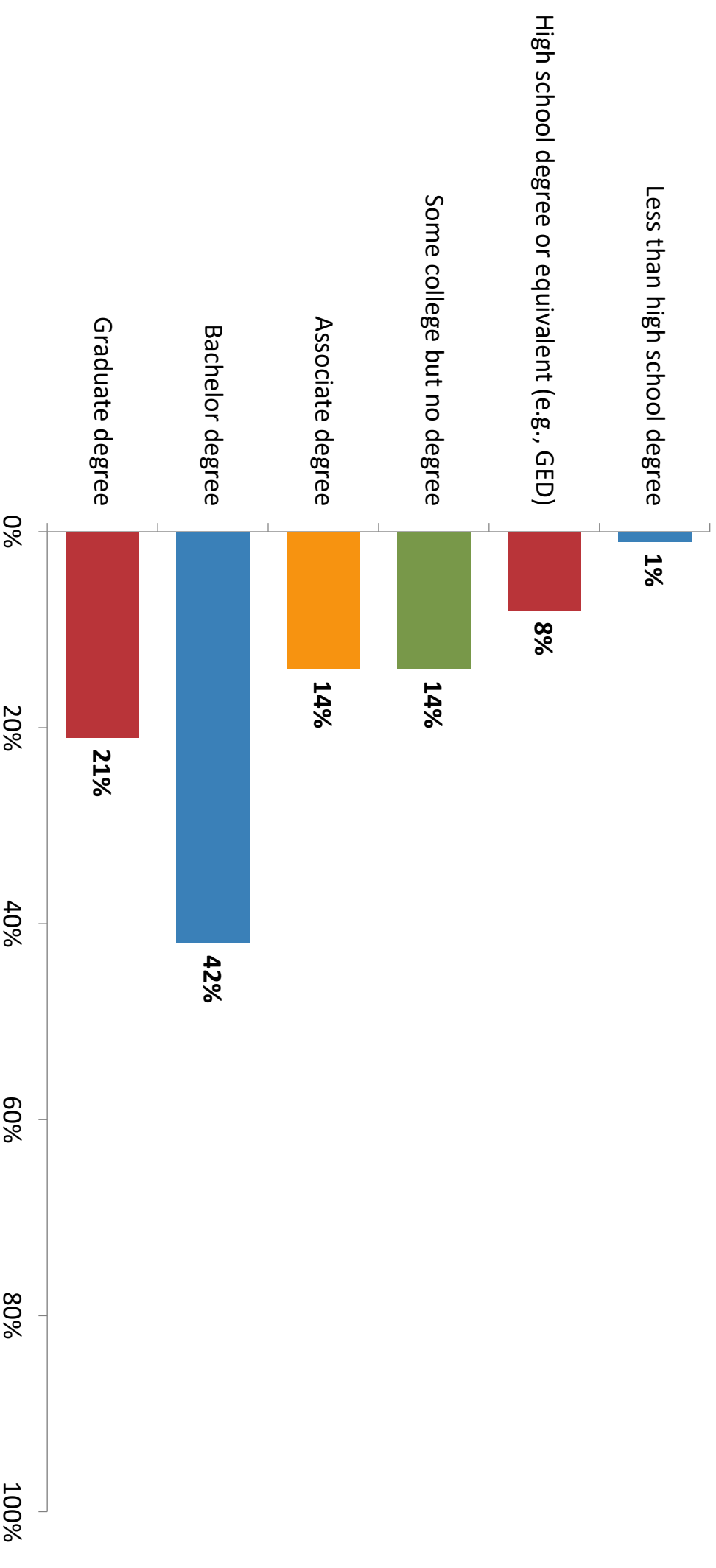
Demographics: Gender



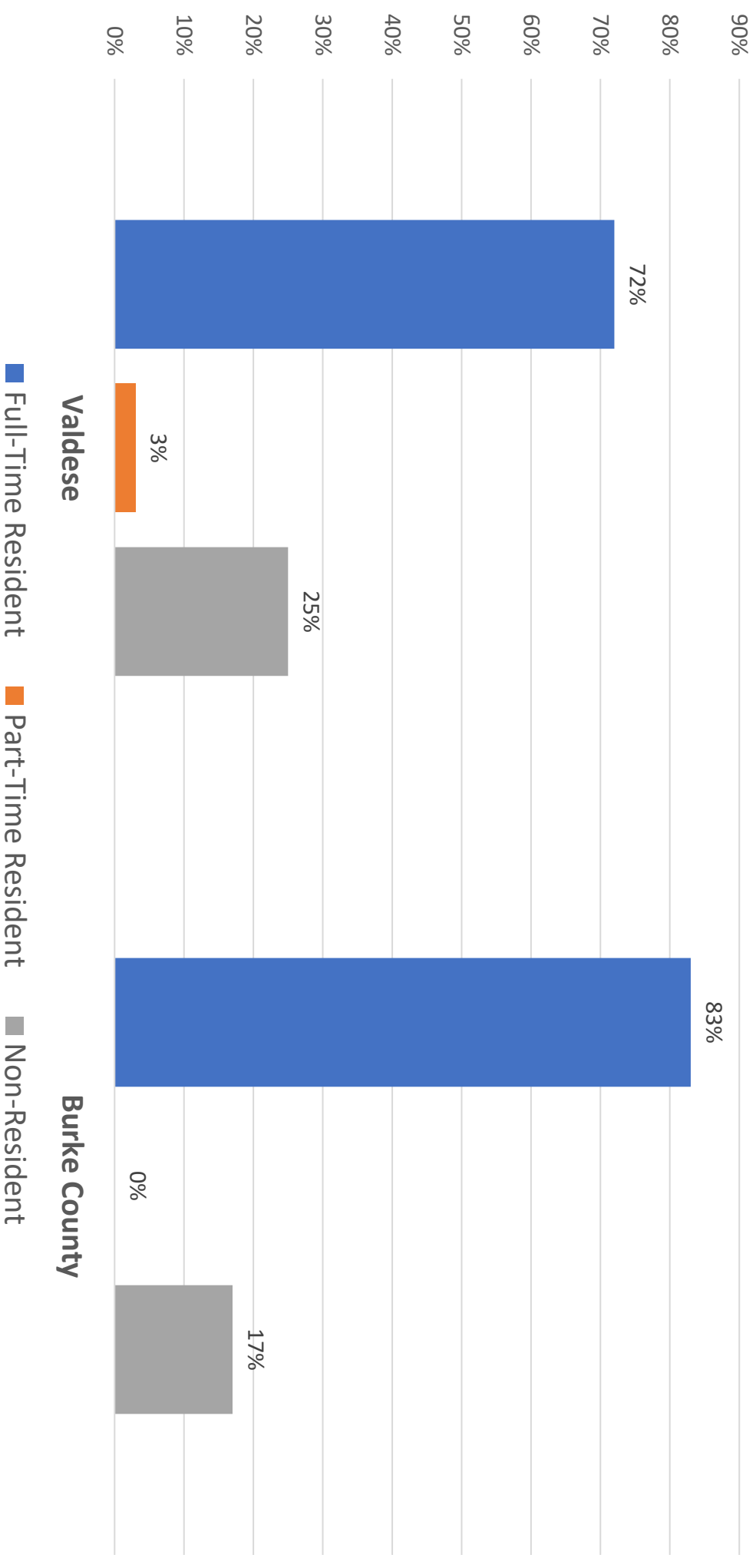
Demographics: Race



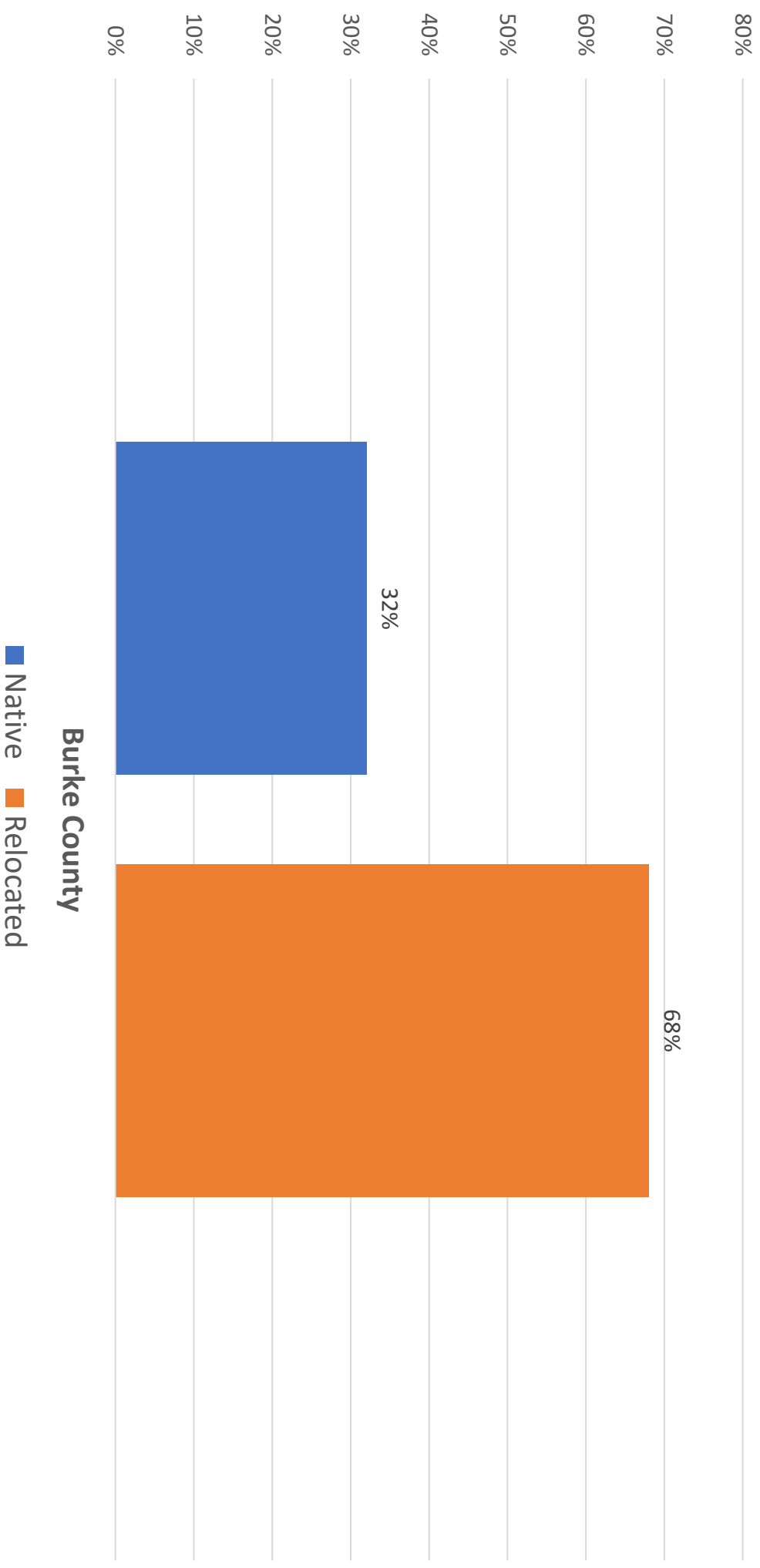
Demographics: Education



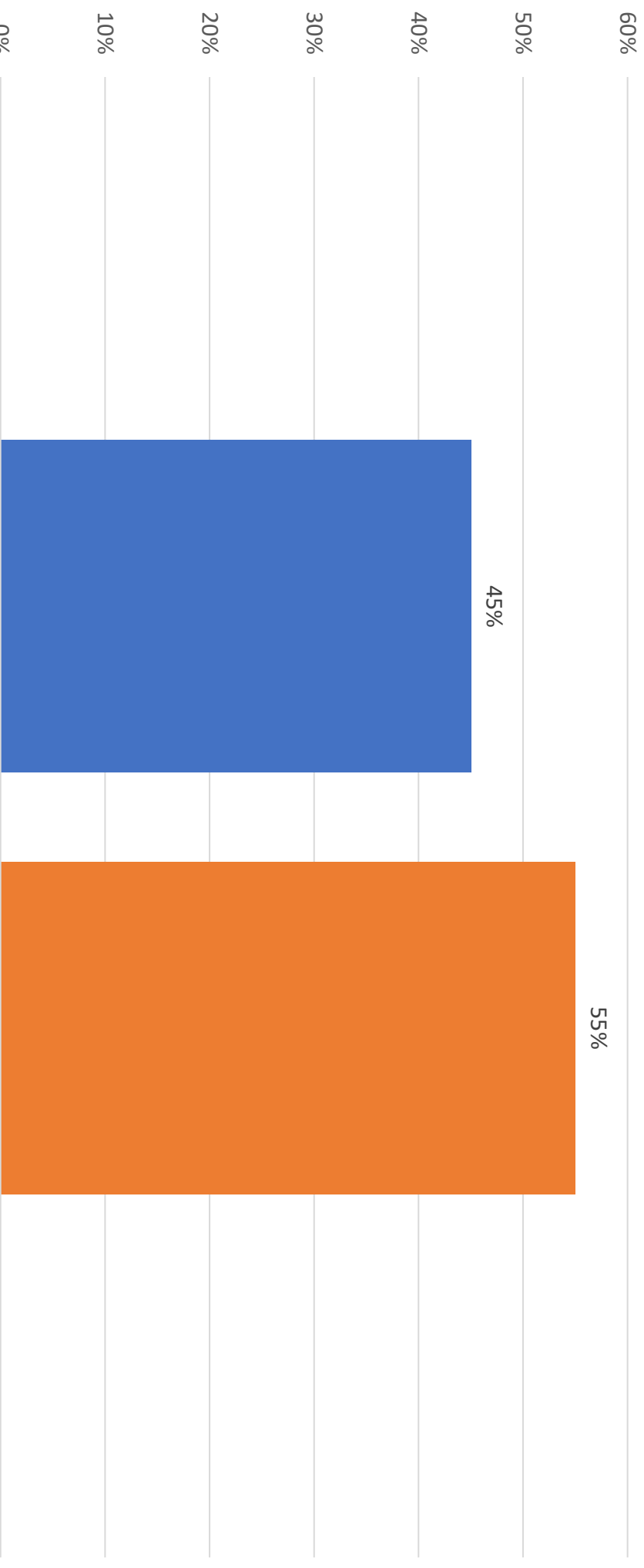
Resident Status



Resident Status



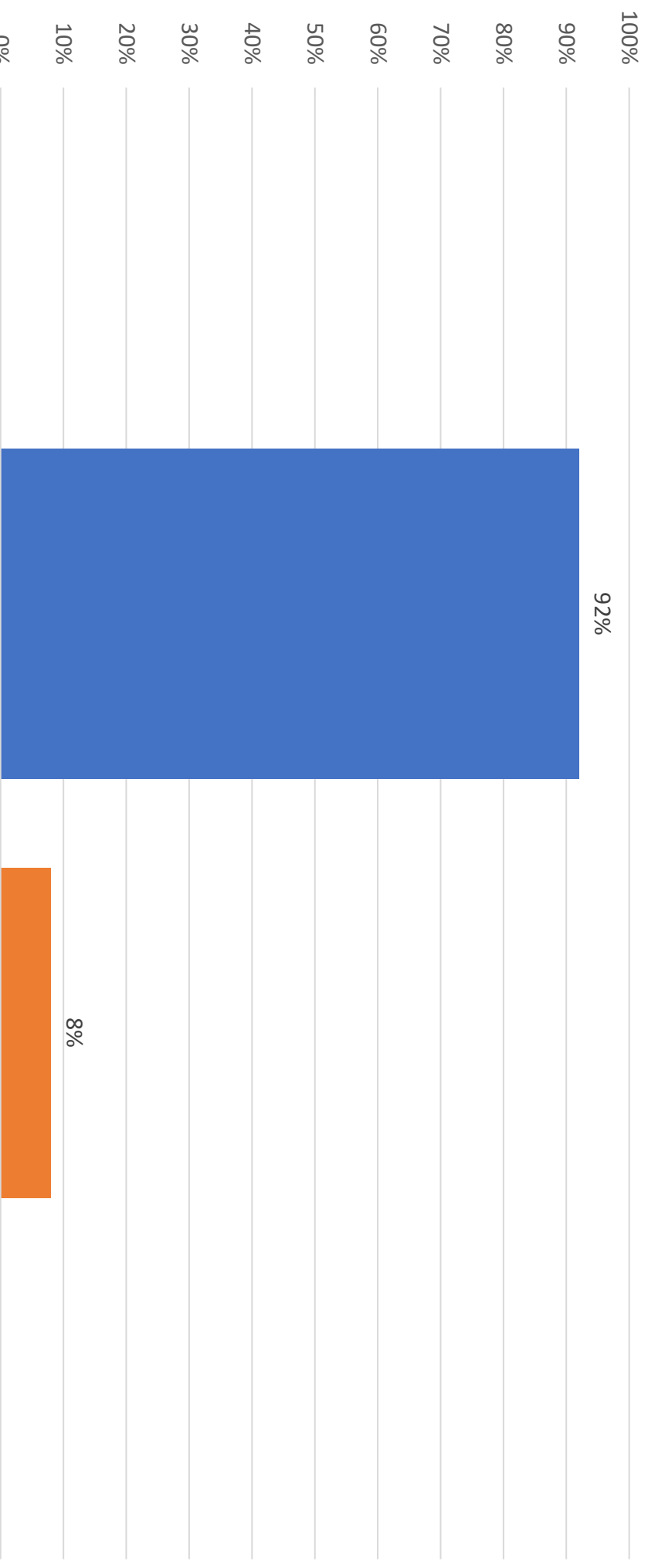
Employment Status



Do you work in Burke County?

■ Yes ■ No

Outdoor Participation



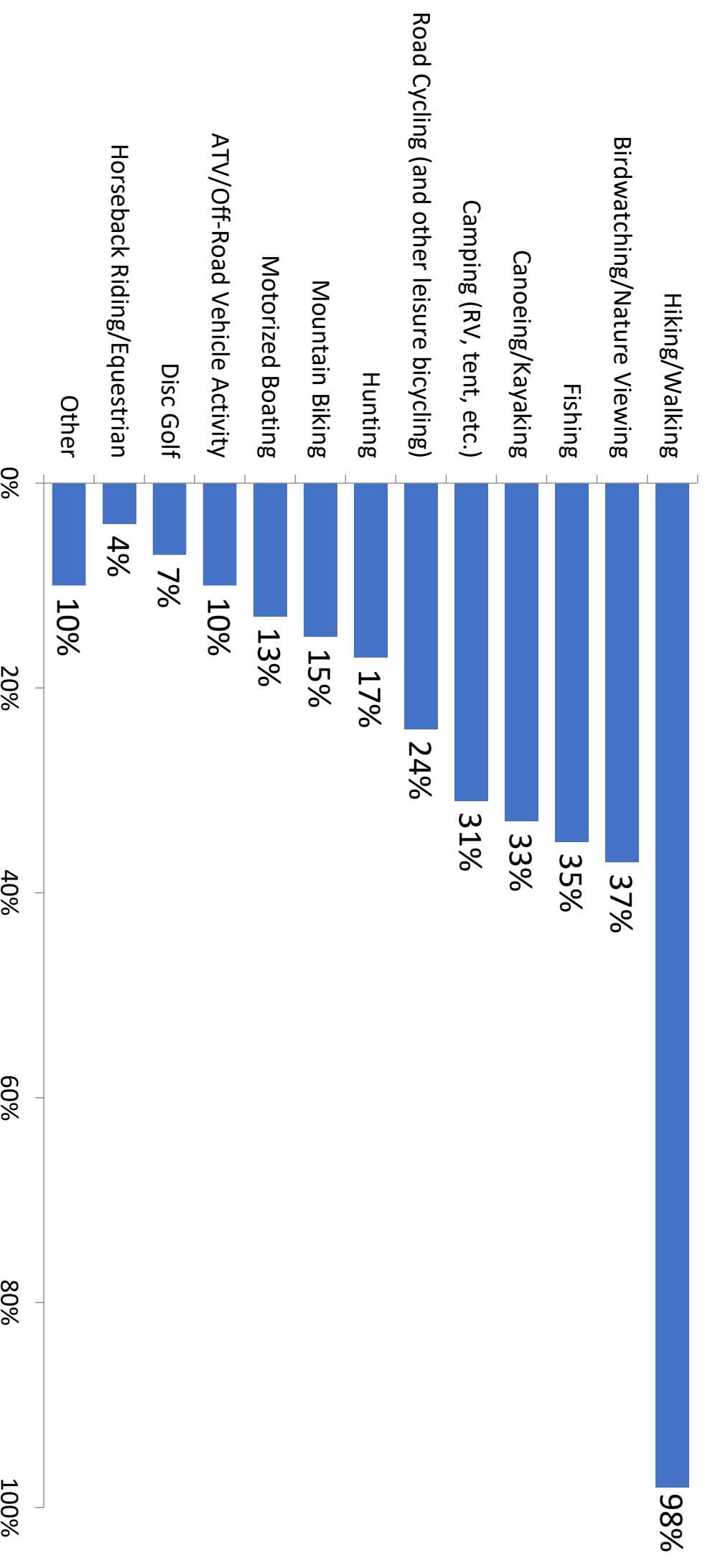
Do you or your immediate family members participate in outdoor recreation?

■ Yes ■ No

If YES...

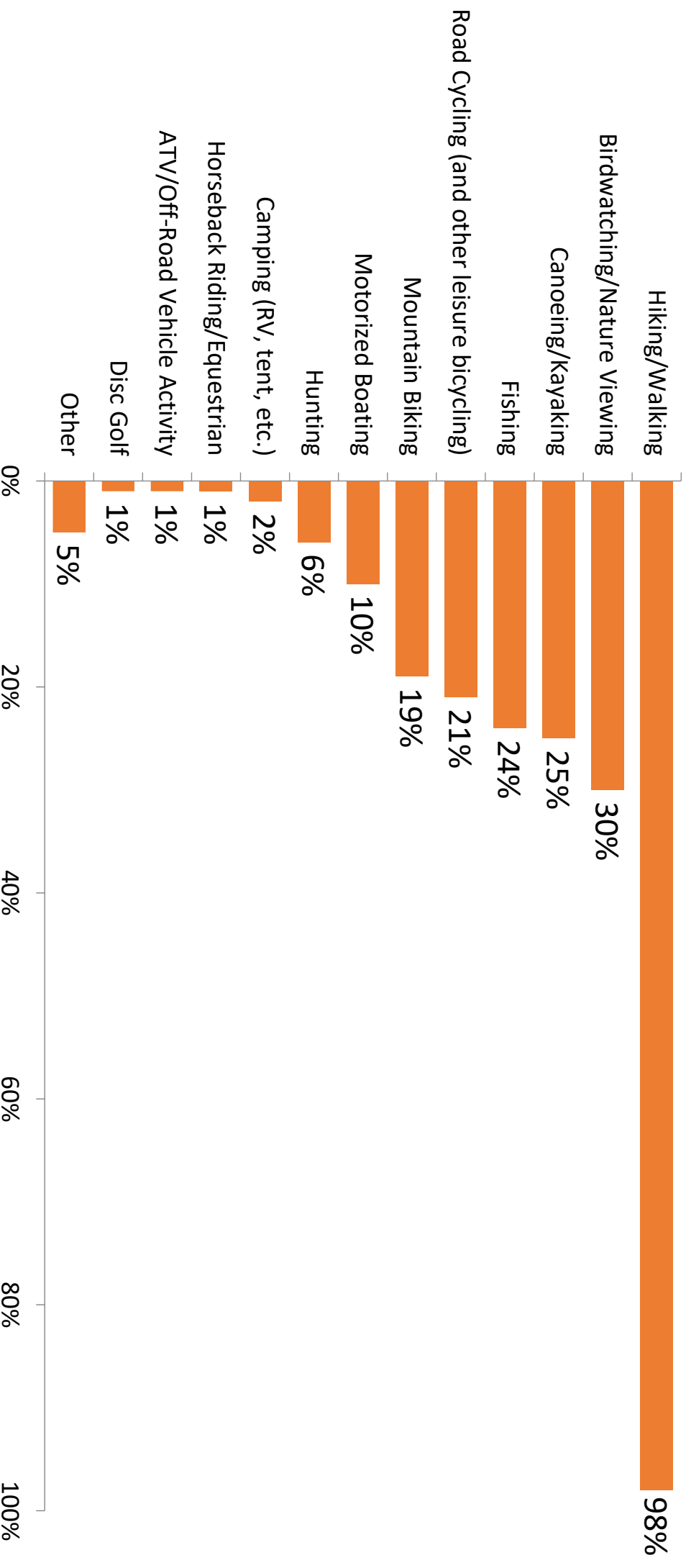
Primary Activities

Which outdoor recreation activities do you participate in regularly? (select all that apply)

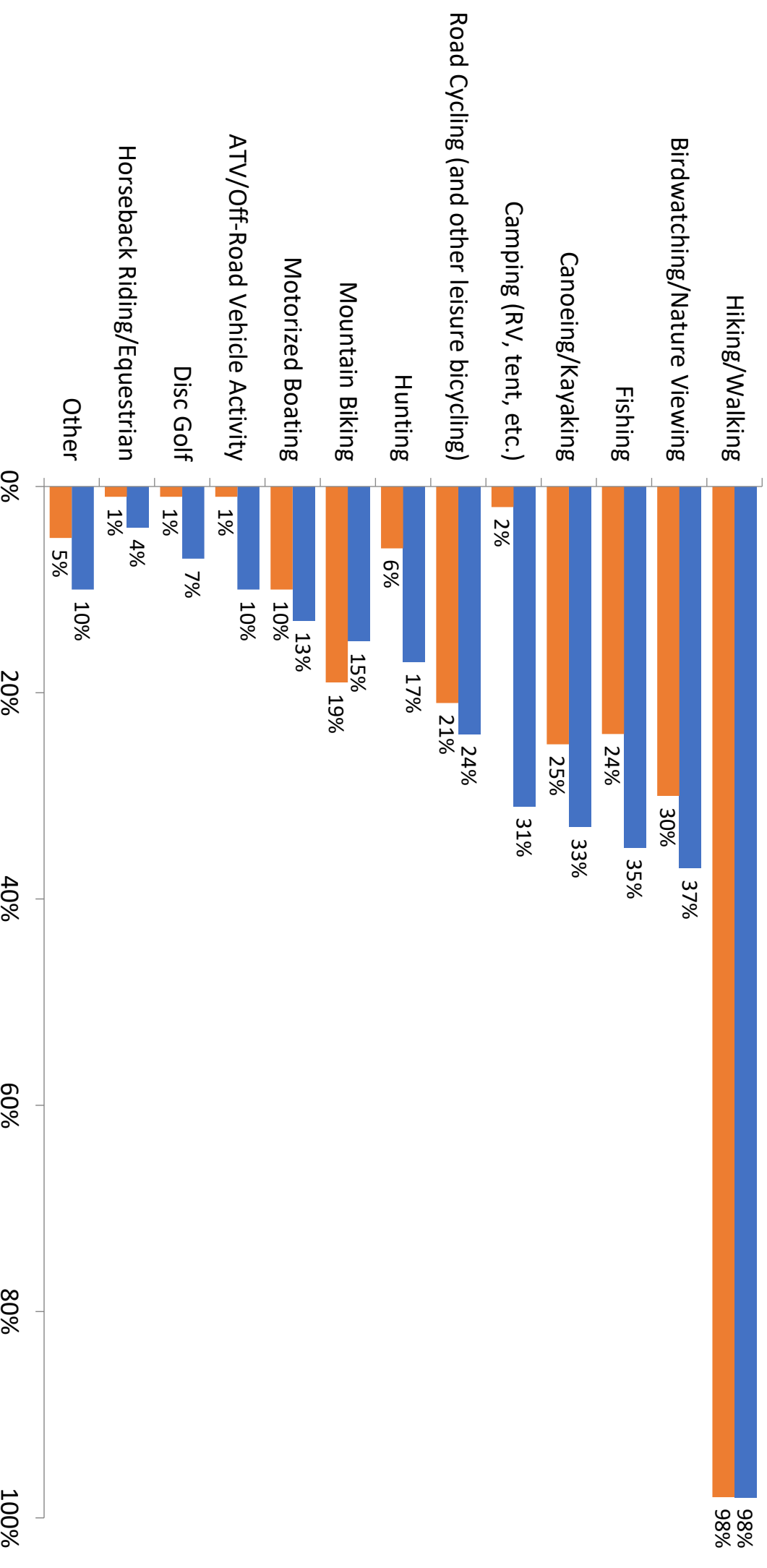


Available Activities

Of the activities that you participate in regularly, which are available to you in the Town of Valdese?

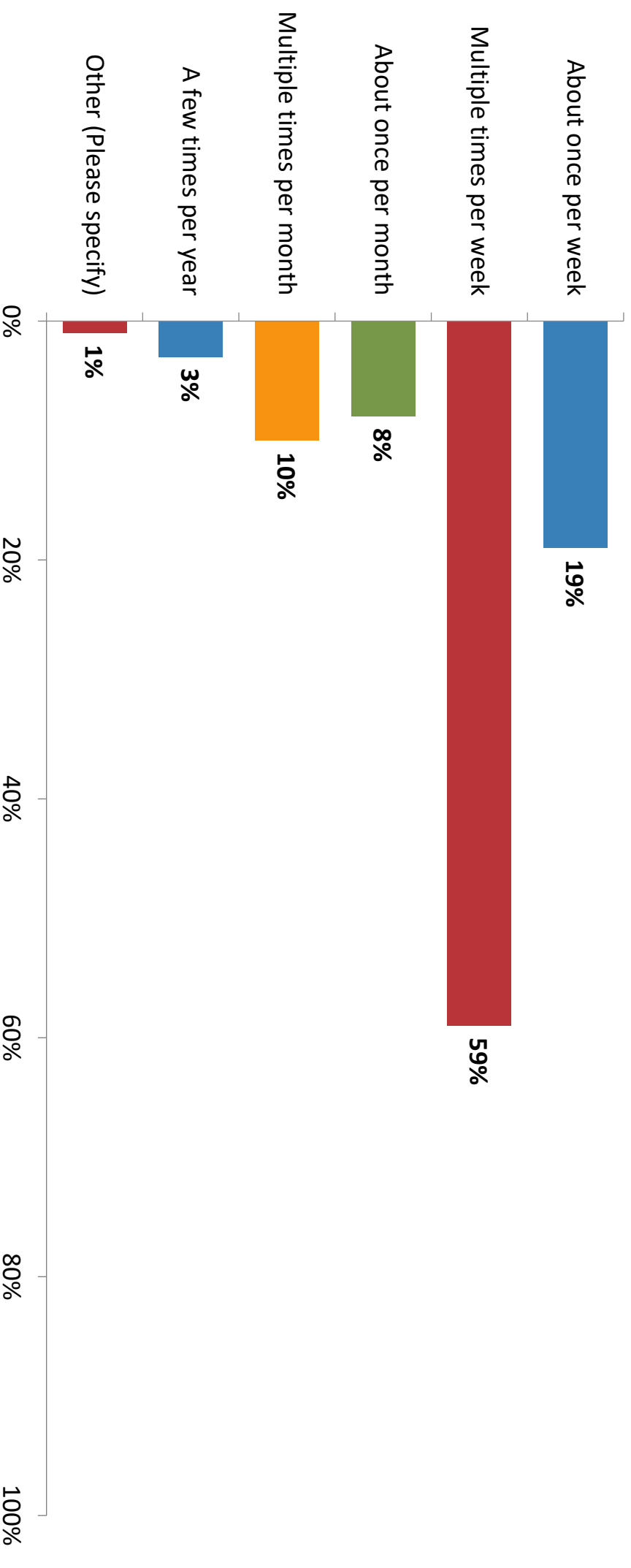


Primary vs. Available Activities



Participation Frequency

How often do you participate in outdoor recreation activities?



Favorite Recreation Areas

Lakeside Park	69	Catawba Meadows	4
		South Mountains	3
McGalliard Falls Park	13	Fonta Flora Trail	3
		Draughn High School	3
Parks and Rec Facilities	13	Catawba River	2
		Waldensian Church	2
Old Rock School Track	7	Playgrounds	2
		Outdoor Bar/Restaurants	2
Lake James	7	Lake Hickory	2
		My Backyard	2
Sidewalks	6	Blue Ridge Parkway	1
		Broyhill Park	1
Downtown	6	Children's Memorial Park	1
		Zack's Fork Mountain Bike Trails	1
Swimming Pool	5	Bike Trails	1
		Linville Gorge	1
Lake Rhodhiss	5		

Desired Improvements

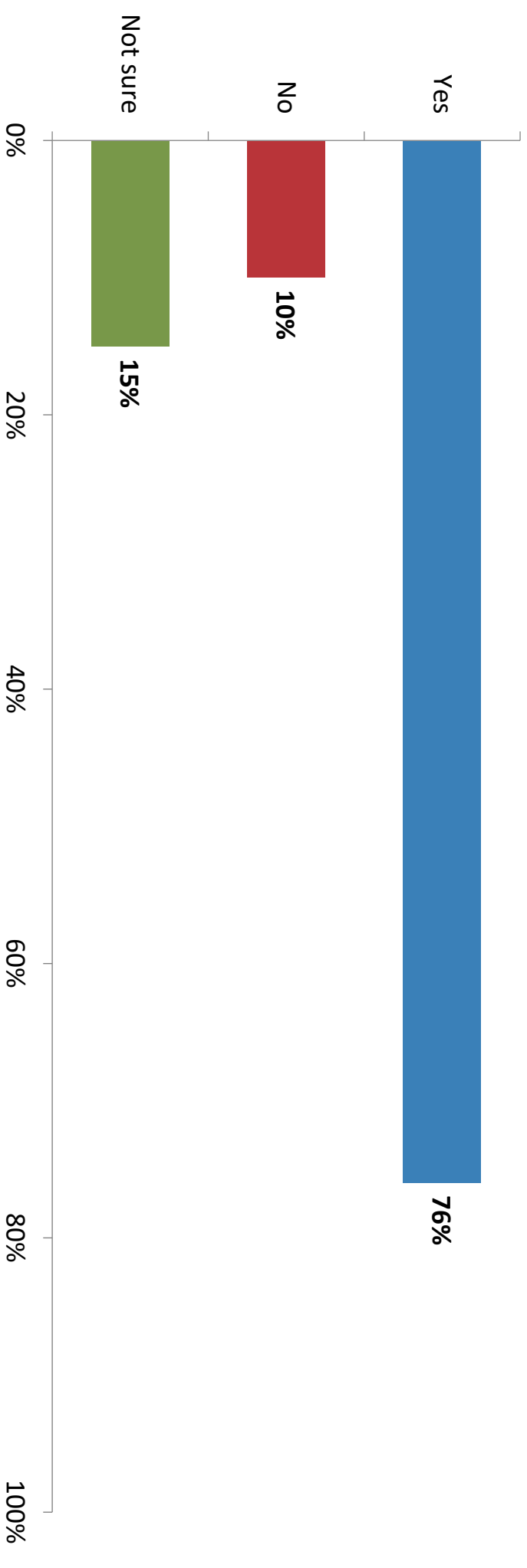
Lake/River Access Improvements	10	New/Improved Playgrounds Restroom improvements/access Fishing Access/Pier Pavilion/Stage	4 4 4 4
Pool Upgrades/Cover (year-round use)	8	Tent Camping RV Camping Sites	3 3
Cleanup/Clear Debris	8	Conservation of Natural Areas General Accessibility	2 2
Bike Trails	7	Information/Signage about water quality Nature Observation Areas	2 2
New/Improved Paved Greenways	7	Paved Parking area at Lakeside Park Disc Golf	2 2
Seating and Picnic Areas	7	Increased Lifeguard Pay WiFi Access/Cellular	2 2
Security/Safety Measures/Lighting at Parks	6	Playground for Seniors/Adults Kayak/Canoe Rentals	2 2
Sidewalk/Trail Connections	5	Wayfinding Signage	2

Desired Activities

Canoe/Kayaking	10	Mountain Biking	4
		Fishing	4
		Activities for Children	4
		Shooting/Hunting	3
		Tennis/Pickleball	3
Disc Golf	7	Outdoor Basketball	2
		Skateboarding	2
		Activities for Seniors	2
RV & Tent Camping	5	Music and Events	2
		Dual Sport Motorcycle Trails	1
Paved Bike Paths	5	Bird Watching	1
		Lake Swimming	1
		Picnicking Areas	1
Walking/Greenway/Sidewalks	5	Equestrian	1
		Hunting/Fishing for Wheelchairs	1
		Scuba Diving	1
		Climbing/Bouldering	1

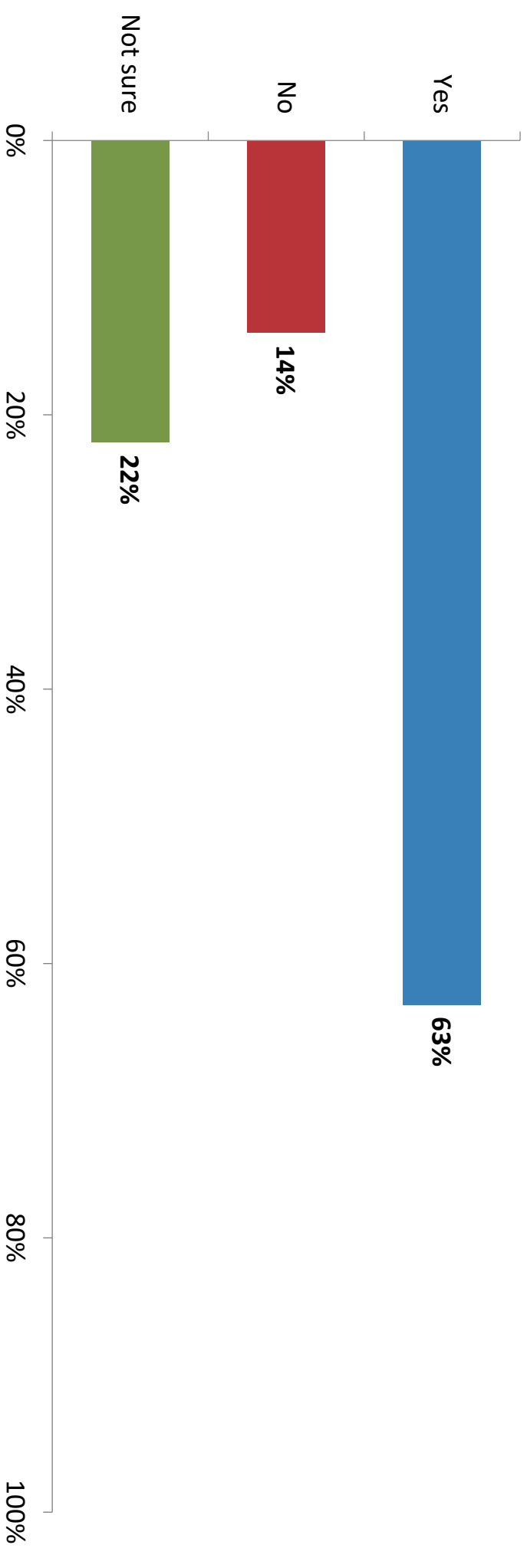
Activities for All Ages

Do you believe that there are outdoor recreation activities available for all ages in the community?



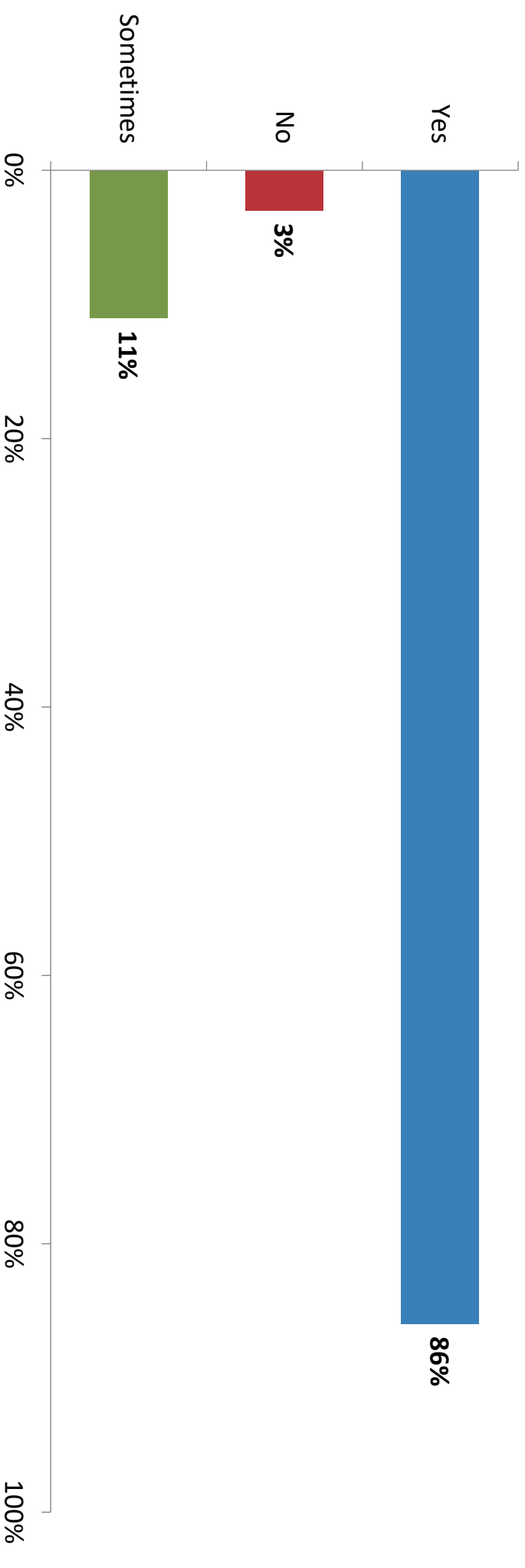
Activities for All Skill-Levels

Do you believe that there are outdoor recreation activities available for all skill levels in the community?



Vacation Recreation

Do you participate in outdoor recreation activities when traveling or on vacation?



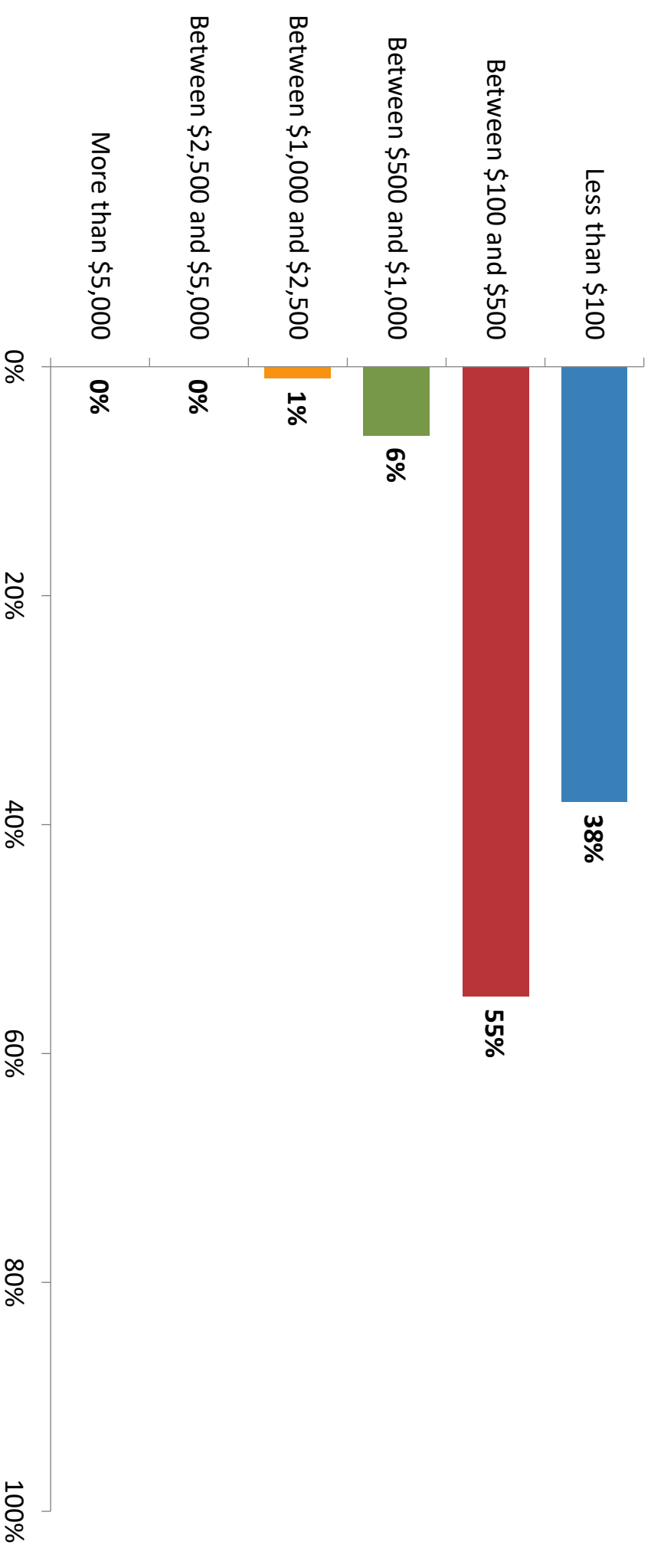
Favorite Destinations

<u>Activities/Geographies</u>	-
Beach	9
Hiking Trails	7
Fishing Areas	3
Bike Paths	2
Walking Parks/Greenways	2
Rivers/Streams/Creeks	2
Lakes/Ponds	1
Disc Golf Courses	1
Hunting Areas	1
Outdoor Art Shows	1
Electric Bike Trails	1
Mountain Bike Trails	1
Skateparks	1

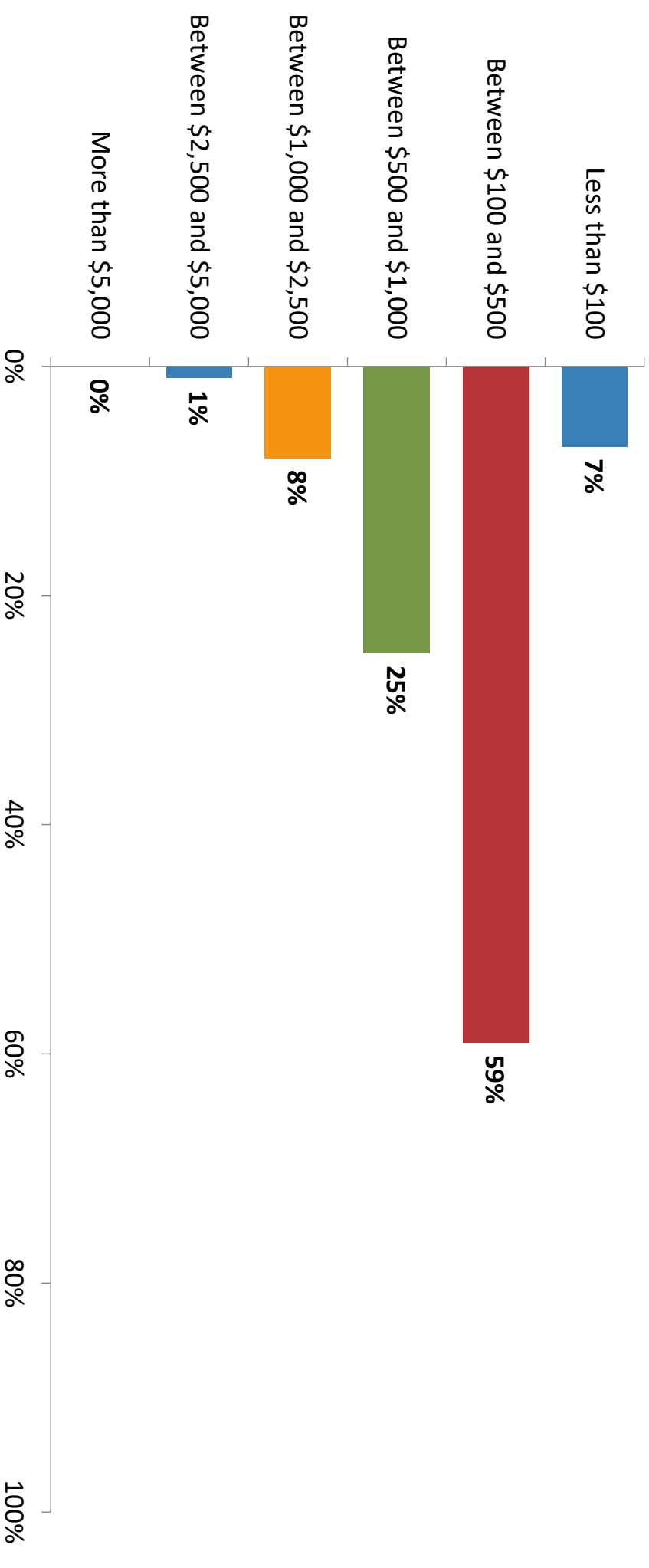
<u>Towns/Destinations</u>	-
Lake James	15
Linville, NC	8
Blowing Rock, NC	6
Black Mountain, NC	5
Asheville, NC	5
Boone, NC	4
Chimney Rock, NC	3
Outer Banks	3
Montreat, NC	2
Morganton, NC	2
NC High Country	2
Montana	2
Surrounding States (mountains)	2

<u>Parks/Attractions</u>	-
South Mountains State Park	13
Blue Ridge Parkway	9
Morganton Greenway	9
Blue Ridge Mountains	7
NC State Parks	7
Pisgah National Forest	4
Fonta Flora County Park	4
Great Smokey Mountains National Park	3
Lake Lure	3
Price's Park/Lake	2
Virginia Creeper Trail	2
NC Arboretum	2
Grandfather Mountain	2

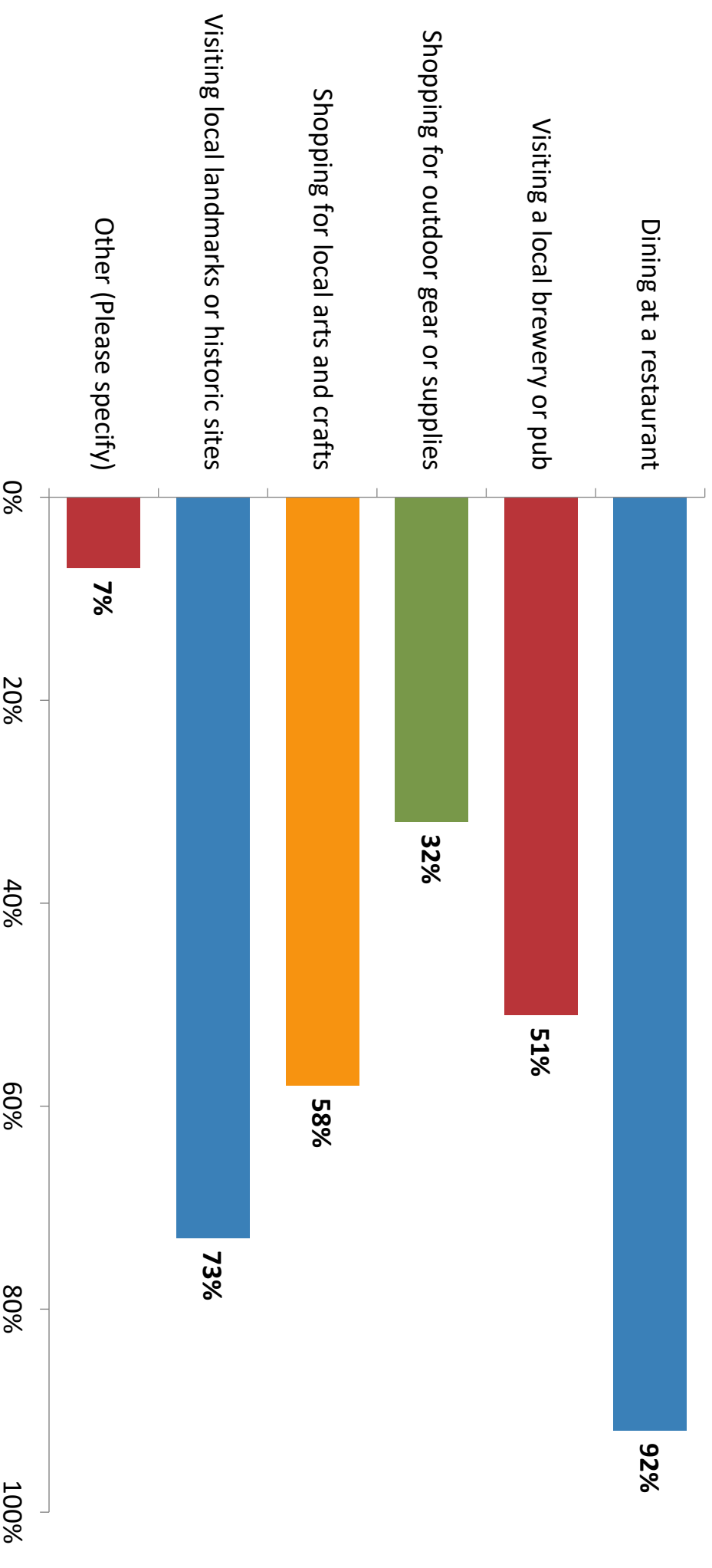
Day Trip Spending



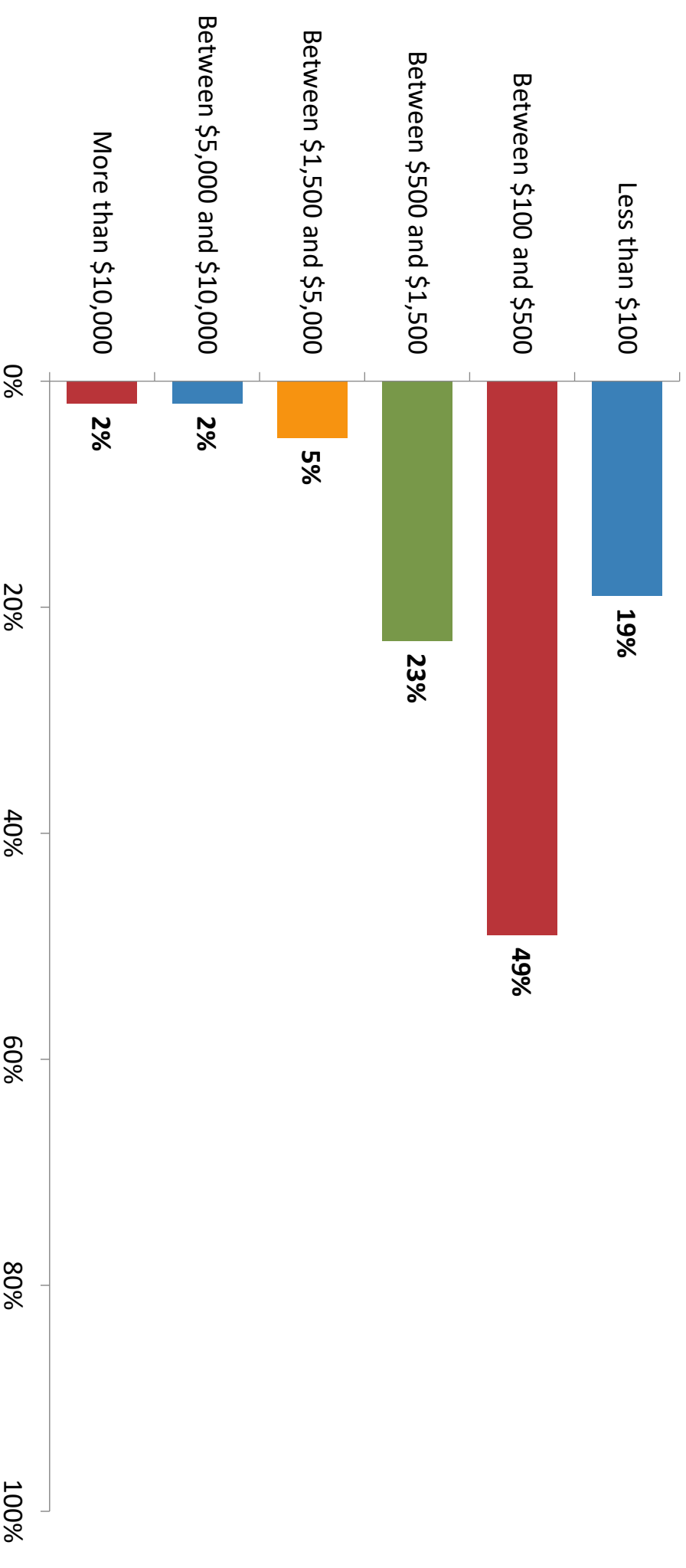
Overnight Trip Spending



Peripheral Activities



Annual Outdoor Spending



Outdoor Supply Shopping

Amazon/Online 47

Dicks Sporting Goods (Hickory/Morganton) 21

CBS Sports (Morganton) 18

Wal-Mart 15

Academy Sports (Hickory) 14

REI (Asheville) 12

Local Bike Shop 7

Needed Businesses

Bike Shop/Rental Service 30

Fly Fishing/Tackle Shop 11

General Outdoor Supply 9

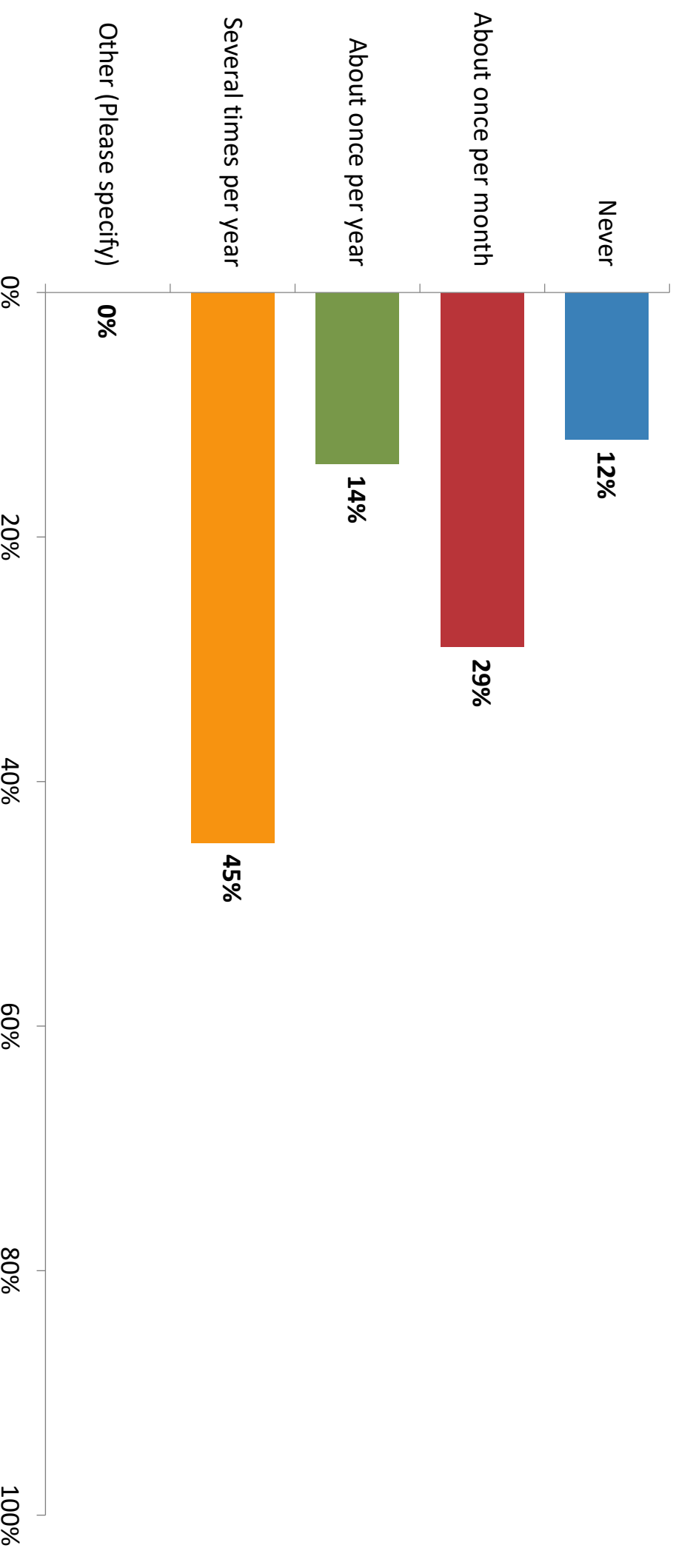
Boating/Watersports Rental Service 8

Local Guide Service 5

TOURISM (ALL RESPONSES)

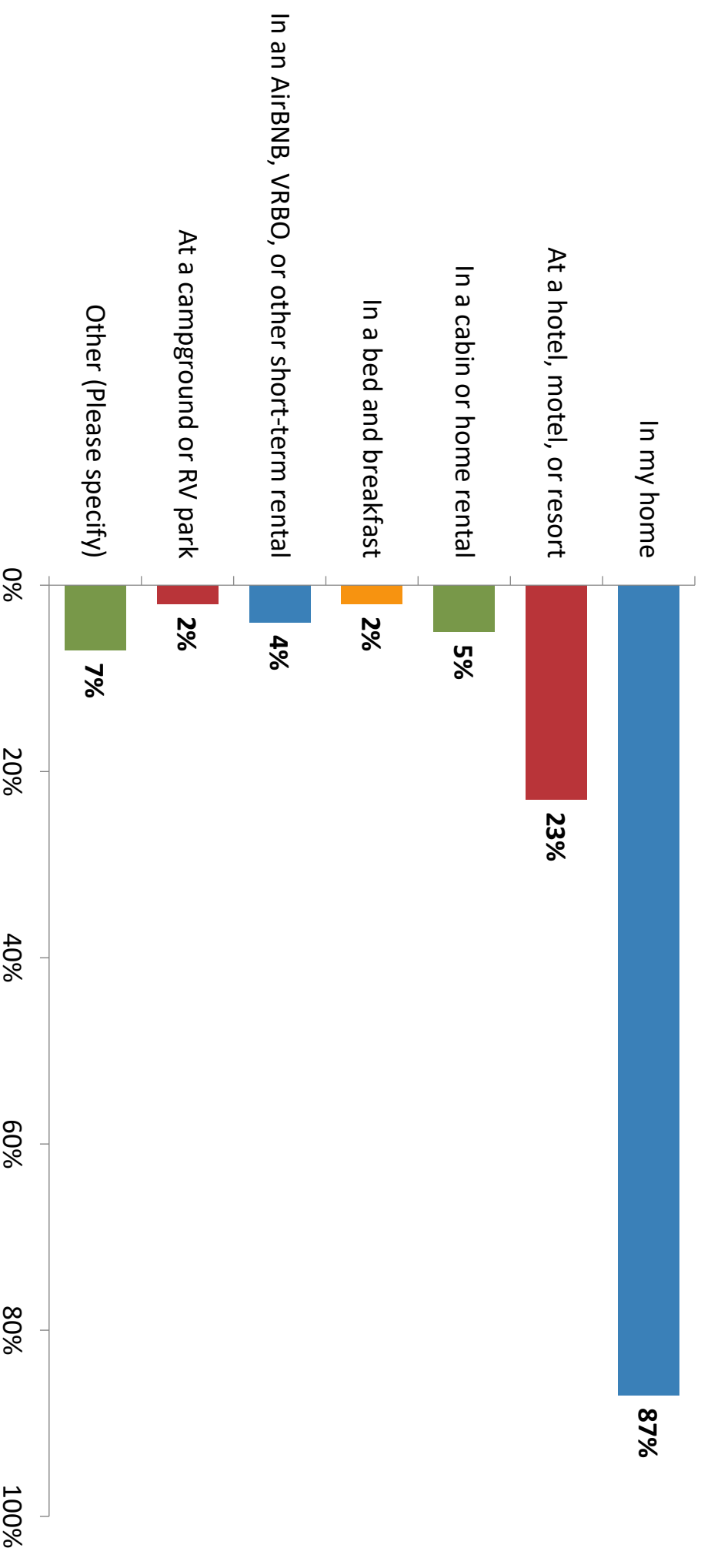
Visitor Frequency

How often do out-of-town friends and family come to visit you in your community?



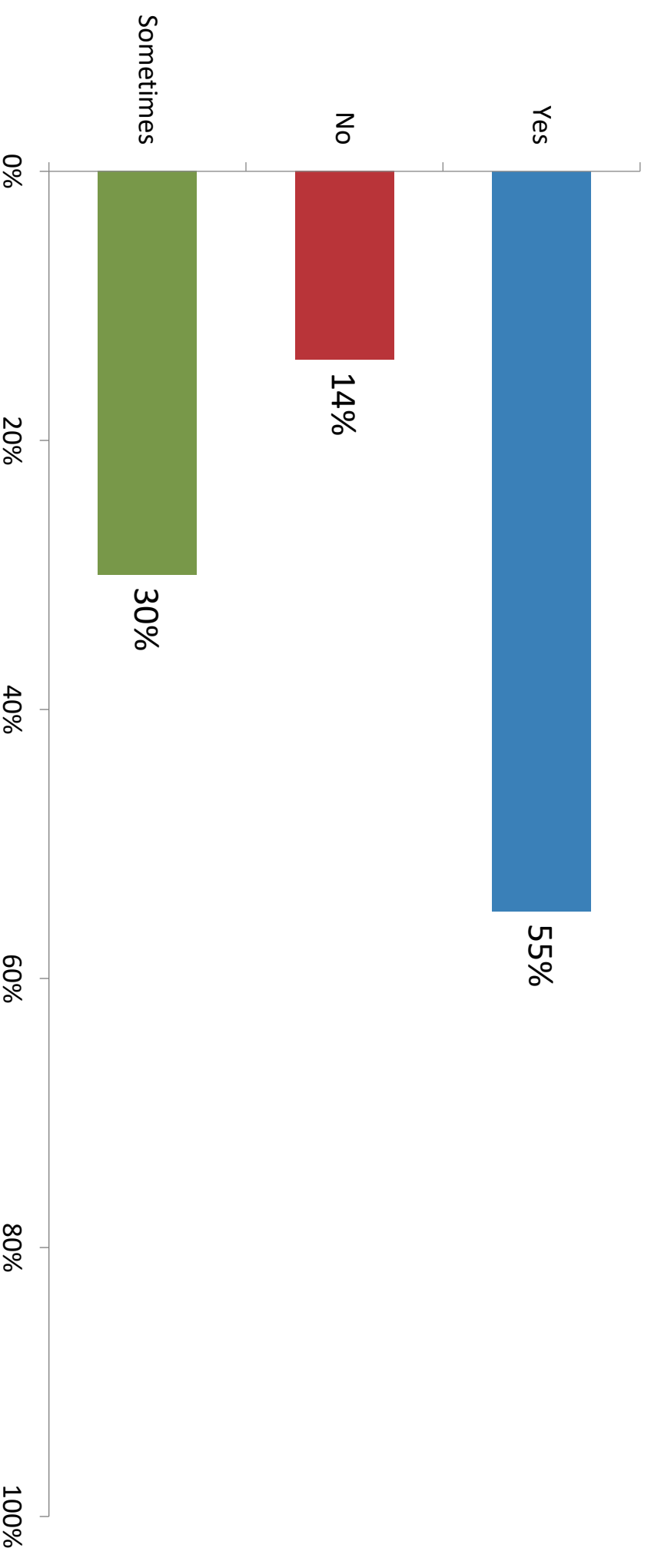
Lodging

When out-of-town friends and family come to visit, where do they stay?



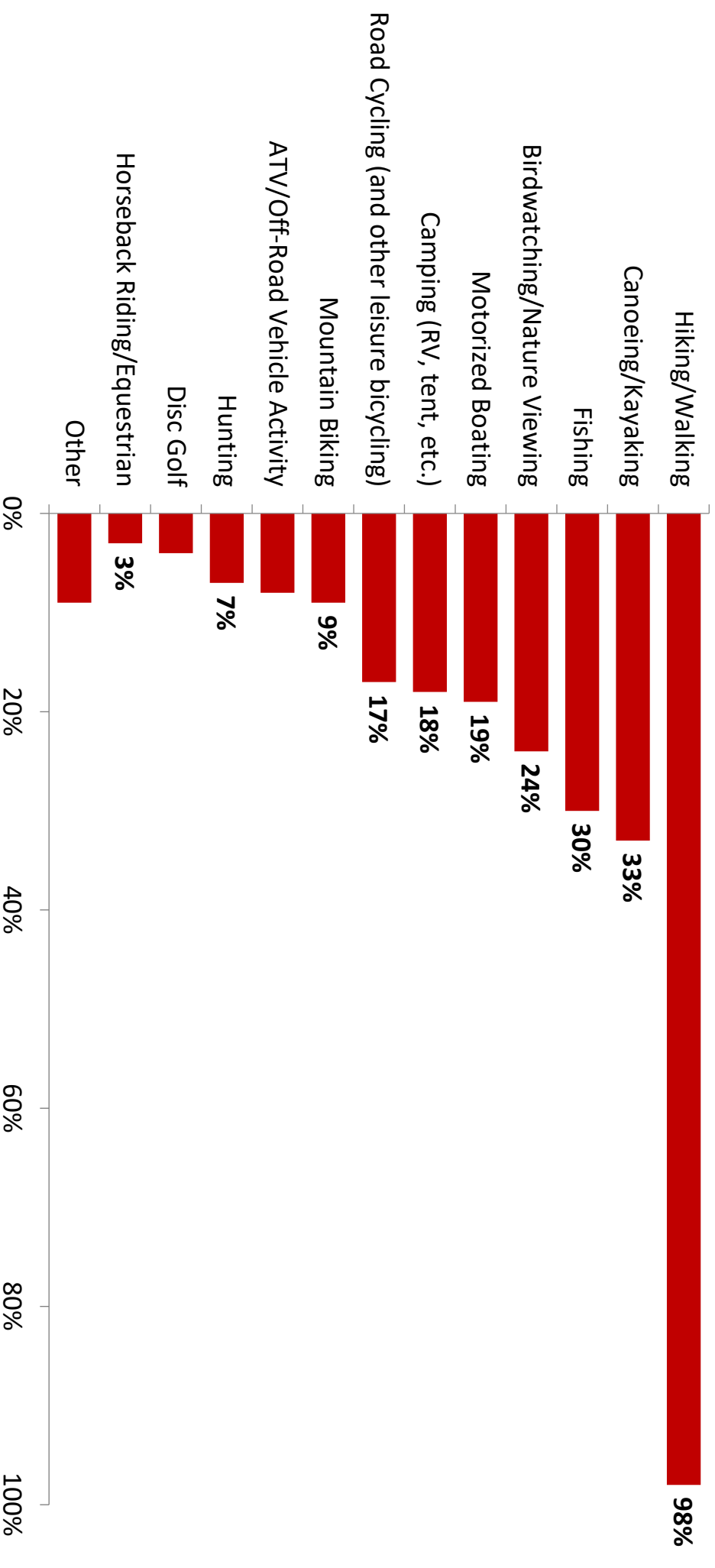
Visitor Participation

Do out-of-town friends and family participate in outdoor recreation activities while visiting your community?



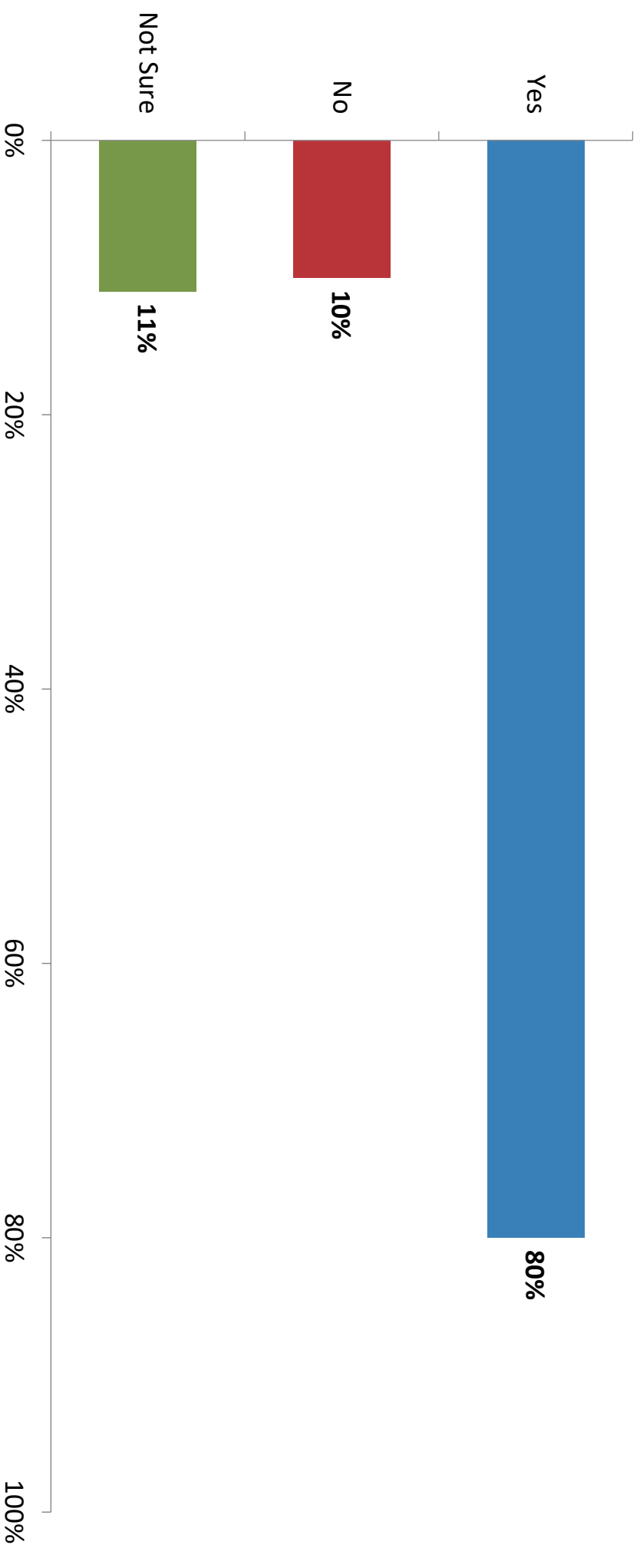
Visitor Participation

If yes, which outdoor recreation activities do out-of-town friends and family participate in while visiting?



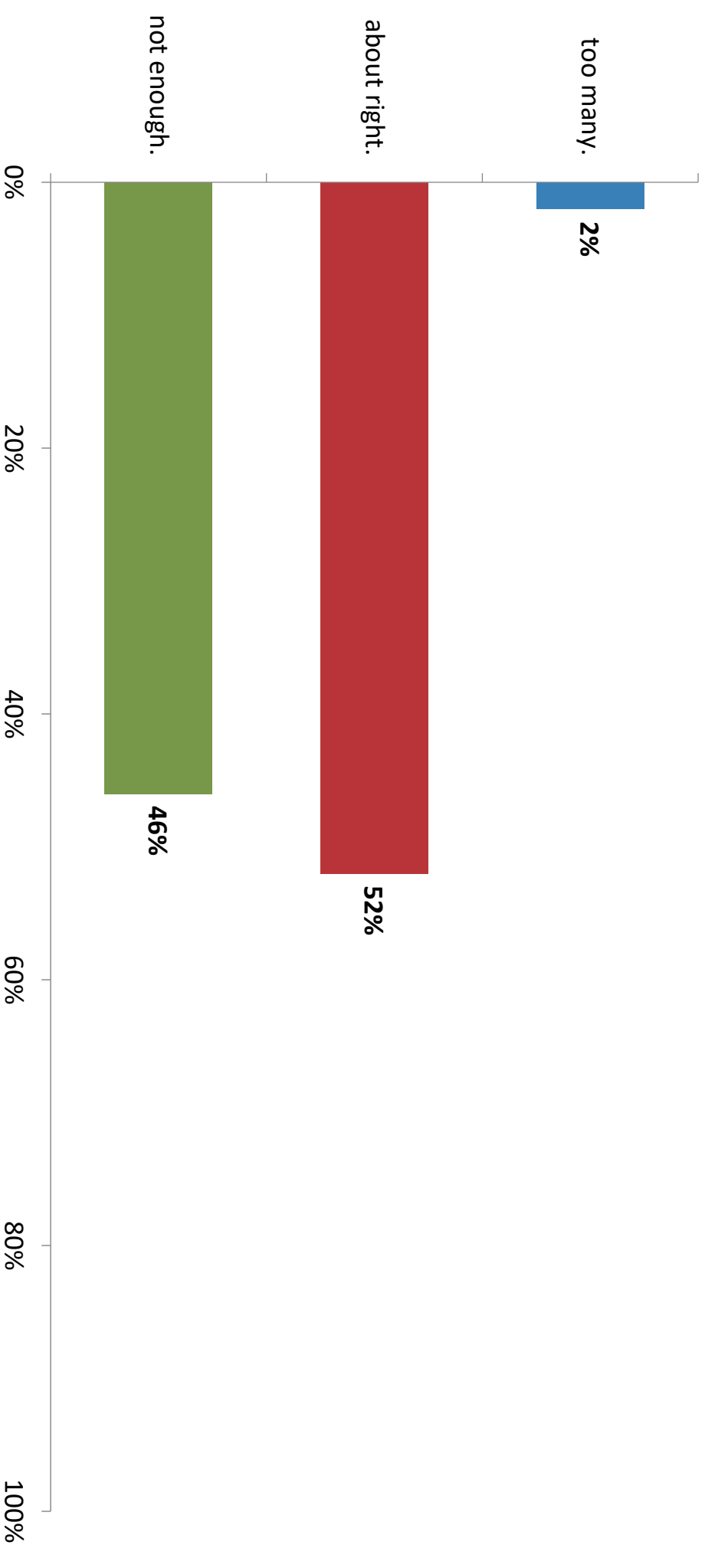
Tourism

Do you believe that tourism is an important part of the economy in your community?



Current Visitors

In your opinion, the current number of visitors to your community is:



Current Visitors

Too Many:

The town has gotten too crowded and is losing the small town feel.

2%

About Right:

The town is doing a good job at bringing in just enough visitors so that it is not overly crowded. Locals are not anti-visitor, but like the current balance.

Locals like the small town feel and don't want it to change or to be pushed out. Parking can be an issue with large events already.

52%

Not Enough:

Locals want to share the beauty and amenities of Valdese with others. Town has lots to offer and we need to boost the local economy & downtown. Plenty of room for visitors - not too crowded.

Lodging options are sparse and housing is a concern. Need more restaurants and businesses to attract visitors. Community is not a well known destination.

46%

Appendix III

Town of Valdese Retail Marketplace Snapshot

NC Main Street and Rural Planning Center staff developed a Retail Marketplace Snapshot by analyzing data within a 5-mile radius of the downtown.



Downtown Valdese Retail Marketplace Snapshot

April 2023

The purpose of this report is to give the Town of Valdese the baseline information for a better understanding of its current market. The NC Main Street & Rural Planning Center Staff studied the retail marketplace date within a 5-mile radius of the downtown area. The retail leakage analysis examines the quantitative aspects of the retail opportunities.

By reviewing the retail gap, we can:

- Understand how well the retail needs of residents are being met.
- Uncover unmet demand and possible opportunities.
- Understand the strengths and weaknesses of the local retail sector.

When consumers spend their dollars outside the specific radius of Valdese this is known as “Retail Gap” throughout this report. Retail Gap or leakage indicates an **unmet demand in the trade area**. This suggests the possibility the community can support additional retail for those business categories. Residents within the specified primary trade areas are purchasing products outside that area indicating opportunity to capture those dollars within the downtown district.

There are also categories for which Downtown Valdese is exceeding the local market demand.

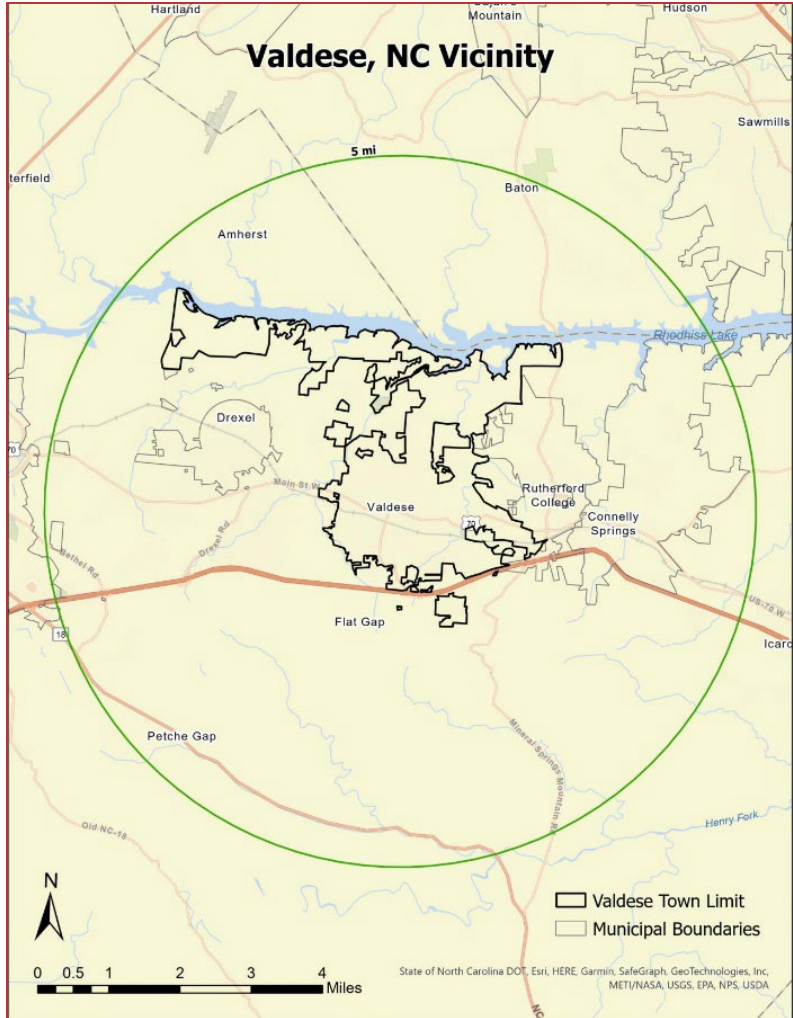


Those are measured as red numbers on the below report. For the 5-mile radius information, this means that Downtown Valdese is exceeding its market potential in these categories. This retail

surplus means the community's trade area is capturing local market plus attracting non-local shoppers. Surplus means the community has possibly developed strong clusters of retail that have broad geographical appeal.

You can also seek additional retail market data that Burke Partnership for Economic Development or the Western Piedmont Council of Government can provide. This report is based on the data collected and should serve as a starting point for your economic vitality efforts.

We highly encourage you to couple this report with consumer surveys to get a complete understanding of the Downtown Valdese potential. The NC Main Street & Rural Planning Center can share examples of consumer surveys and assist with this process as needed.



The above Town of Valdese map outlines a trade area within a 5-mile radius to downtown. Defining the trade area is critical in determining retail opportunities for the downtown market. The NC Main Street & Rural Center staff only reviewed the data within this segment.

The goal is to capture the retail sales volume leaking to neighboring communities, such as Morganton. The chart below shows total industry summaries for the 5-mile radius around downtown. It details the total retail sales gap, potential 10% capture, and retail square footage needed to attract this sales volume.

The sales per square foot column in the charts is the average number based on recent research across the state. Typically, restaurant annual retail sales are higher than \$300 per square foot. There are variables that impact this number such as building owned versus rented, rental rates either higher or lower as well as overall expenses, such as employee wages, insurance, utilities, etc. **Surplus is shown as a red number and retail gap is shown as a black number.**

Distance	Total Retail Gap	10% Capture	Sales/SF	S.F. Needed
5-mile radius	\$58,695,004	\$5,869,500	\$300	19,565

The above chart shows the aggregate number of potential sales within the 5-mile radius around Valdese. Below you will see these number broken down by retail category.

5-Mile Radius Around Downtown

Valdese				
Primary Trade Area 5-mile around downtown		DOWNTOWN POTENTIAL		
Business Type	Retail Gap	10% of Retail Gap	Sales/SF	SF
		10%	\$300	Needed
Furniture Stores	\$ 4,204,851	\$ 420,485	\$ 300	1,402
Appliance Stores	\$ 1,291,923	\$ 129,192	\$ 300	431
Electronics Stores	\$ 4,619,165	\$ 461,917	\$ 300	1,540
Home Centers	\$ 11,586,918	\$ 1,158,692	\$ 300	3,862
Hardware Stores	\$ 551,306	\$ 55,131	\$ 300	184
Nursery, Garden and Farm Supply Stores	\$ 1,616,139	\$ 161,614	\$ 300	539
Grocery Stores	\$ 3,534,276	\$ 353,428	\$ 300	1,178
Specialty Food Stores	\$ 977,658	\$ 97,766	\$ 300	326
Beer, Wine and Liquor Stores	\$ 2,249,064	\$ 224,906	\$ 300	750
Cosmetics and Beauty Stores	\$ 940,823	\$ 94,082	\$ 300	314
Clothing Stores	\$ 6,866,565	\$ 686,657	\$ 300	2,289
Shoe Stores	\$ 1,774,993	\$ 177,499	\$ 300	592
Jewelry Stores	\$ 2,053,606	\$ 205,361	\$ 300	685
Luggage and Leather Goods Stores	\$ 1,066,457	\$ 106,646	\$ 300	355
Sporting Goods Stores	\$ 1,871,400	\$ 187,140	\$ 300	624
Hobby, Toy and Game Stores	\$ 1,172,489	\$ 117,249	\$ 300	391
Book Stores	\$ 658,965	\$ 65,897	\$ 300	220
Office and Office Supplies Stores	\$ 604,961	\$ 60,496	\$ 300	202
Gift, Novelty and Souvenir Stores	\$ 755,456	\$ 75,546	\$ 300	252
Used Merchandise Stores	\$ 1,057,688	\$ 105,769	\$ 300	353
Pet and Pet Supplies Stores	\$ 759,848	\$ 75,985	\$ 300	253
Drinking Places	\$ 1,605,976	\$ 160,598	\$ 300	535
Full Service Restaurants	\$ 6,874,477	\$ 687,448	\$ 300	2,291
Total Gap	\$ 58,695,004	\$ 5,869,500	\$ 300	19,565

5-Mile Radius Retail Surplus

Category	Retail Surplus
Paint and Wallpaper Stores	\$ 463,505
Pharmacies and Drug Stores	\$ 31,293,953
Department Stores	\$ 1,037,998
Limited-Service Restaurants	\$ 1,211,608
Total	\$ 34,007,064

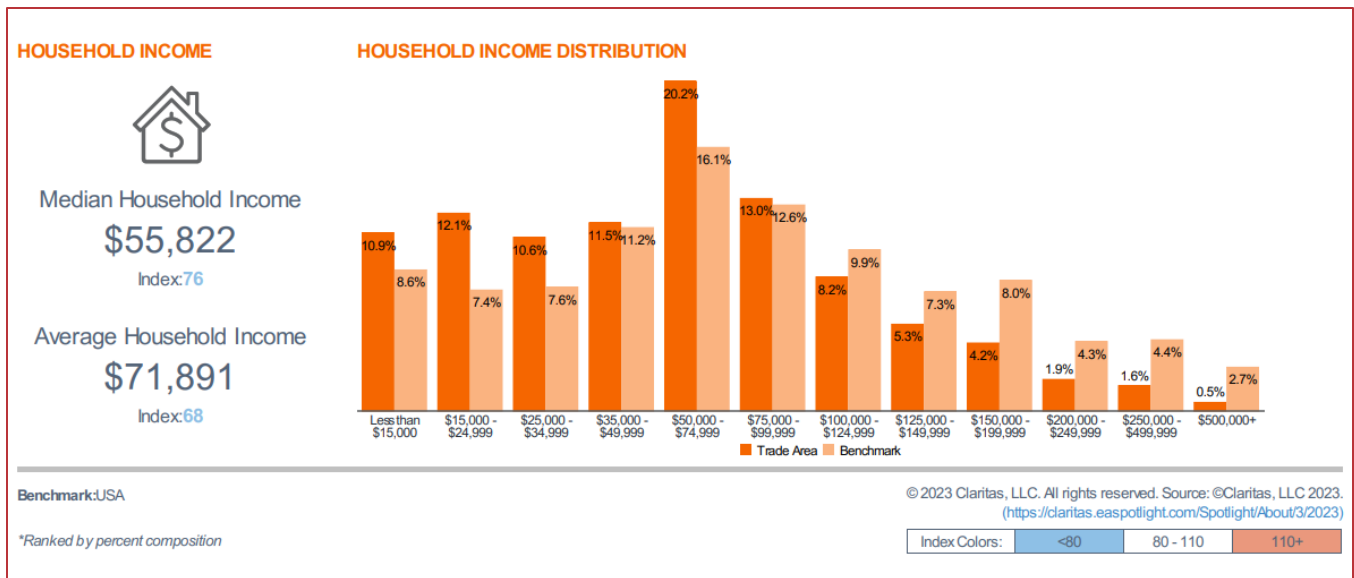
The retail surpluses confirm that Valdese is attracting a disproportionate amount of retail sales in these categories and the potential exists to attract additional retail and restaurant establishments to take advantage of the additional business potential.

Below is a table showing the projected sales growth in different commercial categories. This information can help your recruitment process.

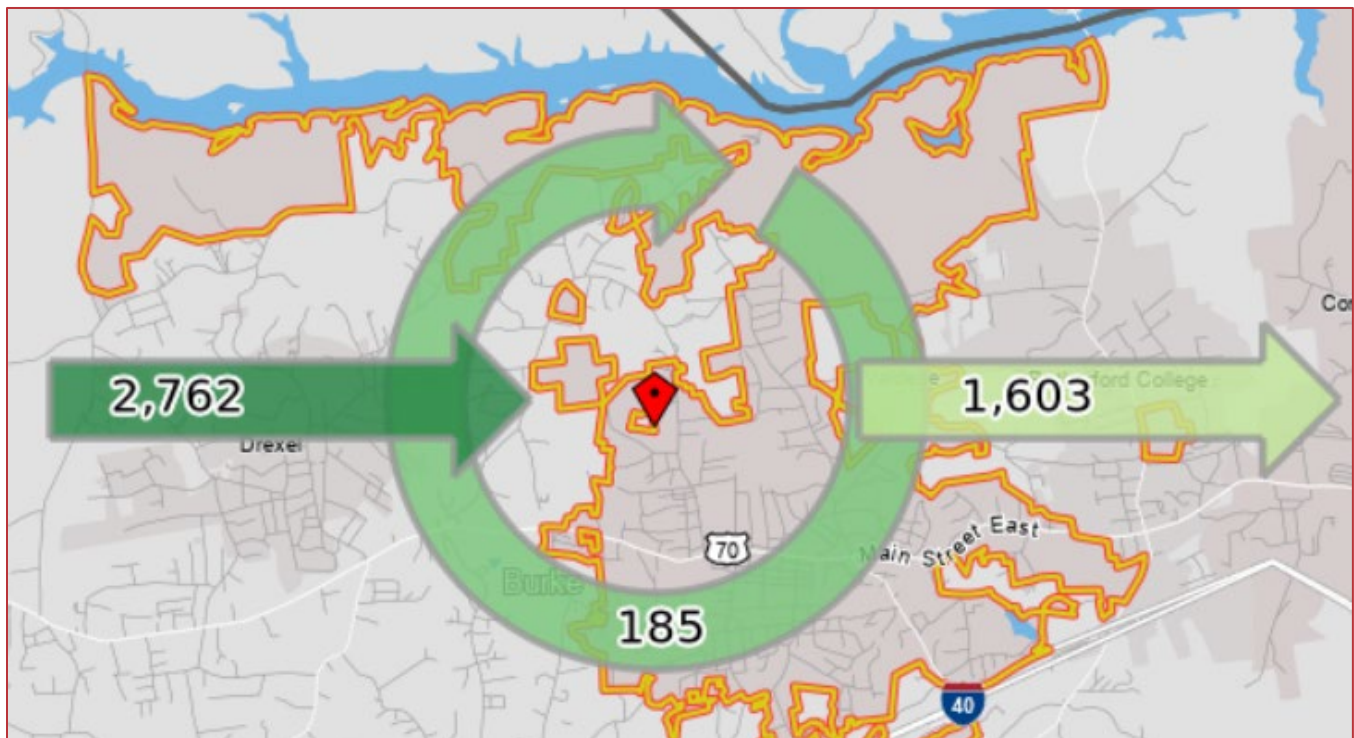
5-Mile Measurement

Valdese Demand Growth by Retail Store Types				
Primary Trade Area: 5 Mile Radius				
Business Type	2022	2027	Growth	Compound
	Demand	Demand	\$	Rate (%)
Furniture Stores	\$ 4,790,587	\$ 5,134,967	\$ 344,380	1
Home Furnishings Stores	\$ 3,384,748	\$ 3,801,181	\$ 416,433	2
Appliance Stores	\$ 1,291,923	\$ 1,420,377	\$ 128,454	2
Electronics Stores	\$ 4,619,165	\$ 5,008,512	\$ 389,346	2
Home Centers	\$ 13,859,273	\$ 15,978,224	\$ 2,118,952	3
Paint and Wallpaper Stores	\$ 988,506	\$ 1,261,799	\$ 273,293	5
Hardware Stores	\$ 2,038,716	\$ 2,353,869	\$ 315,153	3
Nursery, Garden Center and Farm Supply Stores	\$ 2,623,262	\$ 2,921,908	\$ 298,646	2
Grocery Stores	\$ 44,789,171	\$ 49,745,217	\$ 4,956,046	2
Specialty Food Stores	\$ 1,348,634	\$ 1,495,589	\$ 146,955	2
Beer, Wine and Liquor Stores	\$ 3,999,038	\$ 4,461,243	\$ 462,206	2
Pharmacies and Drug Stores	\$ 19,292,551	\$ 20,717,148	\$ 1,424,697	1
Cosmetics and Beauty Stores	\$ 1,345,774	\$ 1,451,931	\$ 106,156	2
Shoe Stores	\$ 1,797,695	\$ 1,827,607	\$ 29,912	1
Office Supplies and Stationary Stores	\$ 656,287	\$ 733,796	\$ 77,509	2
Drinking Places	\$ 1,608,838	\$ 1,722,108	\$ 113,270	1
Full Service Restaurants	\$ 20,935,813	\$ 22,349,606	\$ 1,413,793	1
Limited Service Restaurants	\$ 17,805,416	\$ 19,006,499	\$ 1,201,083	1
Total Sales	\$ 147,175,397	\$ 161,391,581	\$ 14,216,284	

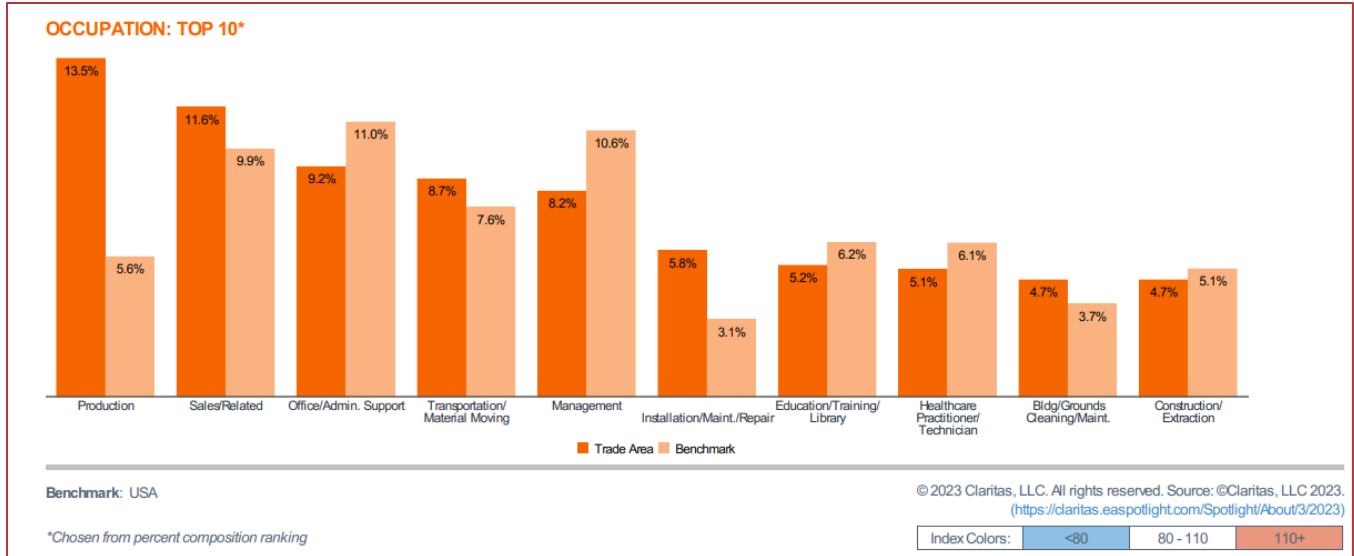
Note: The compound annual growth rate (CAGR) is the annualized average rate of revenue growth between two given years, assuming growth takes place at an exponentially compounded rate. The most important factor in both charts is the amount of projected growth per category.



- \$55,822 Median Household Income (Source: Claritas 5-mile radius 2023)
 - \$50,000-\$74,999 is the largest income segment
 - 54.6% of residents earn \$50,000 and above.



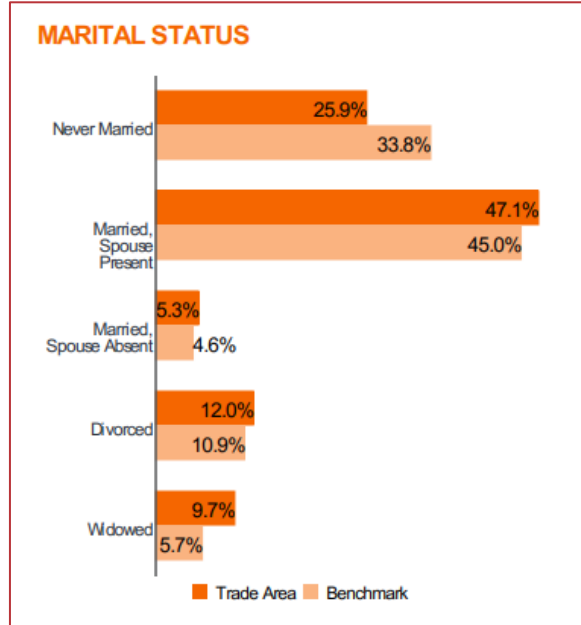
- 2,762 people travel to Valdese daily and 185 live and work within the community.
 - 2,947 total daytime worker population—the equivalent of 63% of Valdese population. (Source: U.S. Census On the Map for Valdese)



- The graph above shows the occupation segments compared to the benchmark U.S. average. (Source: Claritas 5-mile radius 2023)

POPULATION BY AGE

Age	Count	%	Index
0 - 4	1,049	4.5	77
5 - 9	1,058	4.5	76
10 - 14	1,102	4.7	76
15 - 17	729	3.1	82
18 - 20	681	2.9	72
21 - 24	955	4.1	79
25 - 34	2,757	11.8	88
35 - 44	2,512	10.8	84
45 - 54	2,934	12.6	104
55 - 64	3,735	16.0	127
65 - 74	3,356	14.4	135
75 - 84	1,723	7.4	141
85+	700	3.0	146



(Source: Claritas 5-mile radius 2023)

The above graphs reveal the population by age and marital status of those living within 5 miles of Valdese.

The above data can be used to help recruit businesses to Downtown Valdese to meet the unmet potential and reduce the retail gap or leakage. The priorities are to first retain, then expand and finally to recruit new businesses. The categories that show the most potential should be focused

within the 5-mile radius of downtown. This data can help existing businesses realize there may be potential to expand to capture additional retail sales.

Tapestry Segmentation by ESRI On-Line Business Analyst

We find that studying the Tapestry Segments helps to identify a retail mix based on demographics that could enhance the shopping experience. Tapestry Segmentations provide detailed descriptions of America’s neighborhoods. U.S. residential areas are divided into 67 distinctive segments based on their socioeconomic and demographic composition, then segments are further classified into LifeMode and Urbanization Groups. Each radius has numerous LifeMode groups for a total of 100%. The detailed information can give Valdese a sense of who its customer is and insight into how to market to and what types of products to possibly add to existing inventory. By diving deeper into each Tapestry Segment’s LifeMode and Urbanization Group there may be an entirely new businesses that could emerge and possibly be a good fit for the community.

The information provided reflects the U.S. characteristics. The table below shows the top three segments for each category with brief descriptions. Detailed descriptions are obtained by going to the raw ESRI data’s Tapestry information and clicking on each segment for the specific drive times. Visit <http://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation>

Top 3 Tapestries for each location

Total Community		5-mile radius	
Heartland Communities	87.1%	Heartland Communities	38.6%
Midlife Constants	9.8%	Midlife Constants	21.1%
Rooted Rural	3.1%	Southern Satellites	18.1%

Heartland Communities is the top segment for the total Valdese community and those living within a 5-mile radius of downtown. Midlife Constants is the second largest segment for the entire Valdese community and the second largest for those living within 5-miles of downtown. Southern Satellites is the third largest segment for those living within 5-miles of downtown. Each of these will be addressed below:

Heartland Communities

Total Households (U.S.)	2,850,600
Average Household Size	2.39
Median Age	42.3
Average HH Income	\$42,400

WHO ARE WE?

Well settled and close-knit, Heartland Communities residents are semirural and semiretired. These older householders are primarily homeowners, and many have paid off their mortgages. Their children have moved away, but they have no plans to leave their homes. Their hearts are with the country; they embrace the slower pace of life here but actively participate in outdoor activities and community events. Traditional and patriotic, these residents support their local businesses, always buy American, and favor domestic driving vacations over foreign plane trips.

SOCIOECONOMIC TRAITS

- Retirees in this market depress the average labor force participation rate to less than 60%. More workers are white collar than blue collar; more skilled than unskilled.
- The rural economy of this market provides employment in the manufacturing, construction, utilities, healthcare, and agriculture industries.
- These are budget-savvy consumers; they stick to brands they grew up with and know the price of goods they purchase. Buying American is important.
- Daily life is busy but routine. Working on the weekends is not uncommon.
- Residents trust TV and newspapers more than any other media.
- Skeptical about their financial future, they stick to community banks and low-risk investments.

Midlife Constants

Total Households (U.S.)	3,056,400
Average Household Size	2.31
Median Age	47.0
Average HH Income	\$53,200

WHO ARE WE?

Midlife Constants residents are seniors, at or approaching retirement, with below-average labor force participation and below-average net worth. Although located in predominantly metropolitan areas, they live outside the central cities, in smaller communities. Their lifestyle is more country than urban. They are generous but not spendthrifts.

SOCIOECONOMIC TRAITS

- Education: 63% have a high school diploma or some college.
- At 31%, the labor force participation rate is low in this market.
- Almost 42% of households are receiving Social Security 27% also receive retirement income.
- Traditional, not trendy; opt for convenience and comfort not cutting edge. Technology has its uses, but the bells and whistles are a bother.
- Attentive to price, but not at the expense of quality, they prefer to buy American and natural products.
- Radio and newspapers are the media of choice (after television.)

Southern Satellites

Total Households (U.S.)	3,856,800
Average Household Size	2.67
Median Age	40.3
Average HH Income	\$47,800

WHO ARE WE?

Southern Satellites is the second largest market found in rural settlements but within metropolitan areas located primarily in the South. This market is typically slightly older, settled married-couple families, who own their homes. Two-thirds of the homes are single-family structures; almost a third are mobile homes. Median household income and home value are below average. Workers are employed in a variety of industries, such as manufacturing, health care, retail trade, and construction, with higher proportions in mining and agriculture than the US. Residents enjoy country living, preferring outdoor activities and DIY home projects.

SOCIOECONOMIC TRAITS

- Education: almost 40% have a high school diploma only; 45% have college education.
- Labor force participation rate is 59.1%, slightly lower than the US.
- These consumers are more concerned about cost rather than quality or brand loyalty.
- They tend to be somewhat late in adapting to technology.
- They obtain a disproportionate amount of their information from TV, compared to other media.

AARP Livability Index

The AARP Livability Index for Downtown Valdese is 50 on a scale ranging from 0 to 100. The higher the score the more livable the community. Valdese ranks average on this scale. It is important to consider the different index categories, such as health, environment, neighborhood, and opportunity to help you determine what needs to be done to improve this score. Some areas of particular interest include:

Positive

<u>Category</u>	<u>2022</u>	<u>2022 Median U.S. Neighborhood</u>
Housing (50 out of 100)		
Zero-Step Entrances	50.1%	50.1%
Housing Costs	\$798	\$1,057
Housing Cost Burden	15.7%	16.3%
Availability of subsidized housing (Units per 10,000 people)	0	0
Neighborhoods (40 out of 100)		
Access to Grocery Stores & Farmer's Mkts (# of stores or markets)	0	0.0
Access to parks	1	1
Access to libraries	0*	0
Access to jobs by transit	0	0
*The downtown Valdese library is not recognized by AARP		
Transportation (51 out of 100)		
Congestion (Hours per person per year)	10.1	25.5
Speed Limits (Miles/Hour)	25.9	28.0
Crash Rate	7.6	7.7

(Fatal crashes per 100,000 people)

Transportation (51 out of 100)

Frequency of local transit (# of buses and trains per hour)	0	0
--	---	---

Environment (65 out of 100)

Local Industrial Pollution (ORSE score from 0 to 9,070)	0	0.00
--	---	------

Near-roadway pollution (% of people are exposed)	0.00%	0.00%
---	-------	-------

Drinking water quality (% of people exposed to violations)	0.00%	0%
---	-------	----

Health (34 out of 100)

Obesity prevalence (% of adults who are obese)	32.0%	32.2%
---	-------	-------

Engagement (59 out of 100)

Broadband cost and speed (% of residents who have high speed and competitively priced internet)	99.9%	93.7%
---	-------	-------

Opportunity for Civic Involvement (Number of organizations per 10,000 ppl.)	13.2	1.18
--	------	------

Voting Rate (% of people voting)	63.7%	61.9%
-------------------------------------	-------	-------

Social Involvement Index (Index 0 to 2.5)	1.12	0.96
--	------	------

Opportunity (50 out of 100)

Age Diversity (Index 0 to 1)	0.88	0.85
---------------------------------	------	------

Income inequality (Index from 0 to 1)	0.46	0.46
--	------	------

Negative

<u>Category</u>	<u>2022</u>	<u>2022 Median U.S. Neighborhood</u>
Housing (50 out of 100)		
Availability of multi-family housing (# of units multi-family)	7.1%	18%
Neighborhood (40 out of 100)		
Access to jobs by auto	11,422	44,198
Diversity of Destinations (Index from 0 to 1)	0.64	0.65
Activity Density (Jobs and people per 10,000 people)	493	3,056
Crime rate (Crimes per 10,000 people)	254	217.4
Vacancy rate (% of units vacant)	19%	8.6%
Transportation (51 out of 100)		
ADA Accessible stations/vehicles (% of stations/vehicles ADA accessible)	79.8%	82.9%
Walk trips (Trips per household per day)	0.55	0.73
Household transportation costs (Amount per year)	\$15,471	\$15,331
Environment (65 out of 100)		
Regional air quality (Unhealthy air quality days per year)	4.4	4.37
Health (34 out of 100)		
Smoking prevalence (% of pop. who smoke)	19.9%	18%
Access to exercise equipment (% of people who have access)	66.2%	90.1%

Healthcare Professional Shortage Areas (Index from 0 to 26)	18	0
Health (34 out of 100)		
Preventable hospitalization rate (Preventable hospitalizations per 100,000 people)	55%	48.5%
Patient Satisfaction Rate (% of patients satisfied)	71.3%	71.8%
Engagement (59 out of 100)		
Cultural, arts and entertainment institutions (Institutions per 100 people)	0.1	8.01
Opportunity (50 out of 100)		
Jobs per worker (Jobs per worker)	0.75	0.80
High School Graduation Rate (% of students who graduate)	88.0%	88.5%

Walkscore

Walkscore.com provides a measurement of how walkable and bikeable is a community. Using the 100 Main Street address, Valdese scored a 64 Walkscore meaning that it is somewhat walkable, and some errands can be accomplished by foot.

Valdese's Bikescore is 39 meaning it is considered somewhat bikeable with minimal bike infrastructure in place.

Visit www.walkscore.com for more information.

Summary and Recommendations

1. Retail Gap

Significant gaps are seen in furniture, appliances, electronics, home centers, hardware, nursery, garden and farm supply stores, grocery stores, specialty food stores, beer, wine and liquor, cosmetic and beauty stores, clothing, shoes, jewelry, luggage and leather goods, sporting goods, hobby, toy and game stores, bookstores, office and stationary stores, gifts, novelty and souvenir stores, used merchandise, pet and pet supplies, drinking places and full-service restaurants.

2. Retail Surplus

Retail surpluses are seen in paint and wallpaper, pharmacies, department stores and limited-service restaurants.

3. Intersection of Retail Gaps and Projected Growth

Retail recruitment is based on providing evidence of sales potential for a prospective business owner. Those categories that show significant retail potential and projected growth have the highest potential of success. Below are these categories:

<u>Category</u>	<u>Retail Gap</u>	<u>Projected Growth (2022-2027)</u>
Furniture	\$ 4,204,851	\$ 344,380
Electronics	\$ 4,619,165	\$ 389,346
Home Centers	\$11,586,918	\$2,118,952
Hardware	\$ 511,306	\$ 315,153
Groceries	\$ 3,534,276	\$4,956,046
Beer, Wine, and Liquor	\$ 2,249,064	\$ 462,206
Full-Service Restaurants	\$ 6,874,477	\$1,413,793

4. Walkability and Bikeability

The Valdese Walkscore of 64 is above average. Concerning bikeability, Valdese scores below average. You will want to work with the local NCDOT division to incorporate bike lanes into their streets in downtown as well as those controlled by the Town of Valdese.

According to a study by real estate advising company Robert Charles Lesser & Co., homebuyers are increasingly looking for green space and trail systems for walking, running, and biking. In fact, green space and trail systems were the No. 1 and No. 2 desirable community features in this [referenced article - New Home Source](#).

Note that in addition to the walking and biking trail amenities, the #3 amenity that new homeowners want is “Main Street village centers with retail services and cafes for gathering and socializing.”

Downtown Valdese fits the #3 desired community amenity and will want to see ways to

increase walkability and biking options to meet consumer demands.

5. Downtown Development Resources

Hilary Greenberg of Greenberg Development Services is completing a business recruitment manual for the Main Street and Rural Planning Center. It is recommended to access this document when it is available. Also, former Main Street Manager Diane Young created the Downtown Directors' Guide to Working with Development Projects-- <https://www.ncmainstreetandplanning.com/economic-vitality>-- an invaluable resource for downtown revitalization. This is also recommended.

There is additional Claritas retail data and the U.S. Census Quickfacts report to support your retail recruitment efforts.

If you have any questions concerning the above information, please contact ARC Community Economic Development Planner Kyle Case at 984-275-5209 or kyle.case@commerce.nc.gov

Sources: Claritas Retail Data

<http://doc.arcgis.com/en/esri-demographics/data/tapestry-segmentation>
[Livabilityindex.aarp.org](http://livabilityindex.aarp.org)

Burke County map—Glen Locascio, NC Department of Commerce