TICONDEROGA, NY

NYMS TECHNICAL ASSISTANCE

Building Re-use & Market Analyses

Agway Building - *74 Montcalm street*
Rathbun Building - *110 Montcalm street*
Sears Building - *85 Montcalm street*

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camoin associates
ECONOMIC DEVELOPMENT

July 10, 2020

Introduction

The Ticonderoga Revitalization Alliance in conjunction with the Town of Ticonderoga has secured a New York Main Street Technical Assistance Program grant for architectural services to study selected properties within their downtown to help bolster the commercial district. We (in.site:architecture) met with building owners and the Ti Alliance to provide building re-use analysis, condition assessments, and facade recommendations that would help flesh out a vision for moving forward and potentially accessing future grant funding opportunities. Also provided in this report is a market study, which helped inform the building re-use analysis by providing market friendly business plans and strategies that were incorporated into the proposed concepts and plans.

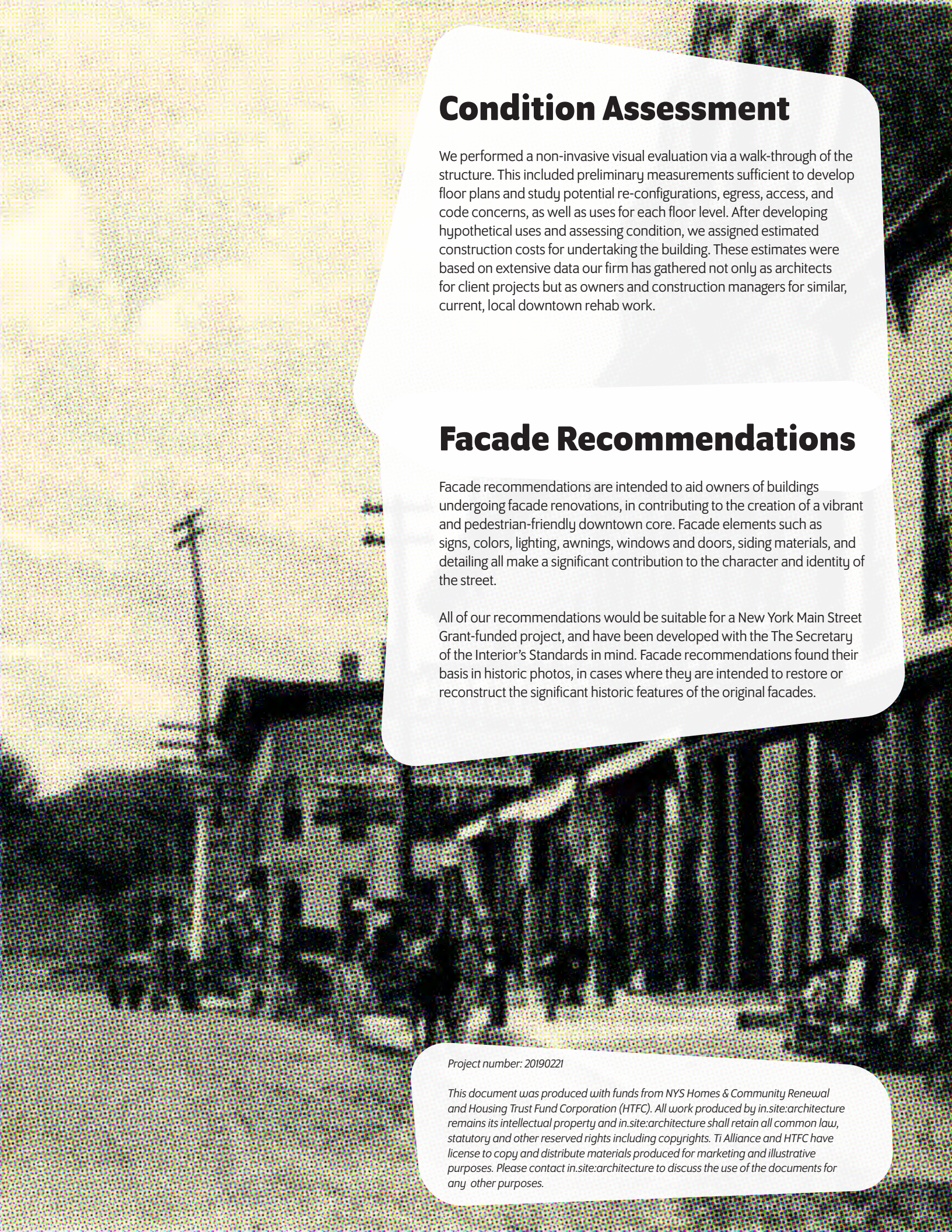
Building Re-use Analyses

These studies were for priority properties identified by Ticonderoga with our input regarding concentrated reinvestment initially. These properties are key players in the perceptions and possibilities for the downtown core. The target properties are located on Montcalm Street, visible to through-traffic from the region, and with a goal of bolstering the goals of a walkable commercial corridor in an area with exceptional historic integrity.

Our report indicates the buildings' suitability for reuse and redevelopment, including reuse for residential units. We have taken cues from the buildings themselves, in order to retain historic character; and from the tenants in those buildings currently occupied.

Our analysis of each building included:

- current physical condition and visual-only assessment of structural and historic integrity;
- issues and constraints involved in NYS or local building codes and accessibility requirements, including occupant load, fire separation and egress (safe exiting);
- conceptual sketch layouts that are architecturally feasible in design, function and standards, making the "highest and best use" of each property from a cash flow standpoint, while restoring historic elements interior and exterior that benefit the community as a whole. Such improvements are suggested with an eye towards federal and state rehabilitation tax credits that would be available given that at least one of buildings are listed individually on the National Register of Historic Places;
- facade recommendation sketches indicating improvements that would be historically suitable;
- preliminary, order-of-magnitude cost estimating that indicates the potential project cost range, as well as a number of factors or phases that may influence the project's financial feasibility.



Condition Assessment

We performed a non-invasive visual evaluation via a walk-through of the structure. This included preliminary measurements sufficient to develop floor plans and study potential re-configurations, egress, access, and code concerns, as well as uses for each floor level. After developing hypothetical uses and assessing condition, we assigned estimated construction costs for undertaking the building. These estimates were based on extensive data our firm has gathered not only as architects for client projects but as owners and construction managers for similar, current, local downtown rehab work.

Facade Recommendations

Facade recommendations are intended to aid owners of buildings undergoing facade renovations, in contributing to the creation of a vibrant and pedestrian-friendly downtown core. Facade elements such as signs, colors, lighting, awnings, windows and doors, siding materials, and detailing all make a significant contribution to the character and identity of the street.

All of our recommendations would be suitable for a New York Main Street Grant-funded project, and have been developed with the The Secretary of the Interior's Standards in mind. Facade recommendations found their basis in historic photos, in cases where they are intended to restore or reconstruct the significant historic features of the original facades.

Project number: 20190221

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AGWAY
TOYOSTOVE

CONDITION ASSESSMENT

Agway Building
74 Montcalm Street
Ticonderoga, NY

General

The front portion of the building is a two and a half story, rectangular, wood framed structure constructed as a grist mill in 1879. A two story, rectangular, wood framed addition to the rear (south side) was later added approximately 6 years after the original construction in 1885. A number of smaller additions later followed, the most significant being a one story, rectangular, wood framed addition on the east side of the rear building. The building is currently unoccupied and is being used as a storage facility for the owner's business, as well as items left behind from the previous owner.

Exterior

Roof ~ The roof structure slopes down from east to west at an approximate slope of 2:12 for both the two story portions of the building. The slope is steeper at the one story portion at an approximate slope of 4:12. The roof system consists of ribbed, metal panels with exposed fasteners and appears to be in good to fair condition. Per discussions with the current building owner, the roof was installed by the previous building owner and there a few locations where the roof is leaking and in need of repair.
*Note that only the roof of the one story addition is visible from grade, two story portion of the roof was not accessed.

Rainwater collection ~ There is currently no rainwater collection system in place. Due to the slope of the roof structure, rainwater flows from west to east and sheet drains off the roof on the east side of the building, collecting at or near the building's foundation. A system should be put in place to collect the rainwater and tie into the existing public storm sewer system or direct water away from the building's foundation.

Exterior wall finish ~ The exterior wall finish on the original 1879 structure is wood shiplap siding with a decorative, bracketed cornice on all sides except the east facade. The siding is severely weathered and varies from fair to poor condition with cracking and peeling paint and some missing and deteriorated boards. It is apparent that a number of windows have been removed and infilled with siding similar to the existing. The second story of the two story rear addition is also finished with wood shiplap siding with a decorative, bracketed cornice on the west side of the building, also in fair condition. On the west facade, the shiplap has been covered over with masonite siding panels in fair condition with visible chipping and deterioration. The shiplap siding on the first story appears to have been removed and replaced with vertical board and batten siding which is weathered but in good condition. The rear one story addition is finished with vertical, ribbed metal panels with exposed fasteners. The majority of the paneling is dented and the base of the panel is deteriorated and patched with new metal paneling on the east side of the building.

Windows ~ The apparently historic, 2 over 2 double hung wood window units are in fair to poor condition. Most window units are intact with the exception of (1) second floor unit on the north facade where the top sash is no longer in place. Windows have been severely weathered with cracking and peeling paint, some deterioration and broken panes of glass. The multi-pane, wood storefront window system on the north and west sides of the first floor are in good to fair condition. Some window panes have been removed and replaced with plexiglass panels. Settling has caused the windows to shift creating air gaps between the glazing panes and frames/mullions.

Doors ~ Exterior doors on the original 1879 portion of the building are wood, recessed panel doors in good to fair condition. The (2) first floor units are multi-pane, half glass doors with a solid unit on the second floor of the north side. The exterior doors on the remainder of the building are mostly wood, sliding barn doors in good to fair condition with some weathering and cracking and peeling paint. The larger sliding door on the east side of the building is severely deteriorated at the base of the door. On the west side of the building there is a more modern roll up overhead door in good condition. Doors appear to be operational but due to building settlement, doors and frames are not plumb and level compromising the weather tightness of the units.

Interior

Flooring ~ The interior finished floor consists of 1x wood planks of varying widths throughout the 1879 and 1185 portions of the building. It is in fair condition and remains mostly unfinished with the exception of the first floor of the 1879 portion which has been painted. A portion of the floor on the first floor in the rear section was removed by the current owner to access and remove abandoned oil tanks from the basement/crawlspace. At the rear, one story addition on the east side of the building, the finished floor is concrete slab on grade in good to fair condition.

Walls ~ With the exception of the original 1879 portion of the building, there is no interior wall finish and the exterior shiplap siding is visible from the interior. When the one story, rear addition was added, the existing exterior shiplap siding was left in place and is still visible from the interior. The 1879 portion is finished with a number of materials, in fair condition, including painted 1x vertical and horizontal plank, wood paneling and peg board with built in wood storage shelving. This area is also the only portion of the building that has a finished ceiling of painted plywood panels, gypsum board/plaster and beams wrapped with wood trim. The condition of the ceiling is fair to poor with some portions of the paneling bowing and no longer attached to the structure.

Structure

Foundation ~ The foundation wall system consists of mortared field stone in fair condition. Little is visible from the exterior, those portions that are require repointing. From the interior of the 1879 portion of the building, the foundation appears to be in fair condition. There are some stress cracks visible on the east side of the building, north near Montcalm Street. A portion of the foundation wall is missing at this location which may have been a basement access point at one time. The wood structure spanning the missing portion of the wall is in poor condition and is likely contributing to the wall above sagging.

Superstructure ~ The existing structural system is heavy timber post and beam construction in fair condition. Overall, there has been a significant amount of settling and shifting of the superstructure causing the majority of the building to become out of level and plumb. In a number of locations the original wood columns have been removed and replaced with temporary supports including new 6x6 wood posts, round steel columns and sections of tree trunk. The majority of the original main beams have defects including checking, splitting, twisting and bowing causing the floor and roof systems to become out of level and plumb. New wood beams have been installed in a few locations to provide shoring for the original structure. On the second floor of the 1879 portion of the building, the exterior walls are being laterally braced by a series of cables tying the east and west walls together. The floor and roof joists are original 2x and 3x material in good condition.

Insulation

The building is currently uninsulated with no foundation, floor, wall or ceiling/roof insulation present.

MEP Systems

MEP system evaluation should be performed by engineers licensed to work in the governing jurisdiction.

Overall Condition Assessment: Fair To Poor

Anticipated Cost Of Repair Work: $$$$$

FACADE RECOMMENDATIONS

Agway Building
74 Montcalm Street
Ticonderoga, NY

Historic Photograph

Existing Conditions

Itemized Scope:

We recommend a complete, and historically appropriate, restoration of the entire exterior. Recommendations are shown in part on the facade sketch. These include:

1. Repair and refinish existing storefront windows
2. Repair and refinish existing storefront cornice
3. New pin mounted LED lighting fixtures
4. Repair and refinish existing cornice & brackets with trim details
5. Repair and refinish existing wood siding
6. New individual raised sign lettering mounted to existing cornice
7. New hanging signage on existing mount.
8. New wood or aluminum clad wood windows
9. Repair and refinish existing wood entry doors
10. New Juliette balcony and refinish/remount existing door
11. New wood or aluminum clad wood full glass door
12. New wood or aluminum clad wood half glass door
13. New wood or aluminum clad wood storefront
14. New deck structure
15. New standing seam metal roof on porch
16. Inspect and repair existing metal roof as required

Paint Selections:

SW 6697 NUGGET

SW 6179 ARTICHOKE

SW 9015 THEY CALL IT MELLOW

SW 6019 POETRY PLUM

4
5
7
COOP
8
9
3
6
2
The Ol' Country COOP
15
10
10
SALE
COOP
1
BEETS!
88¢ Per lb.
9
LATTE $2.45
9
9
12
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13
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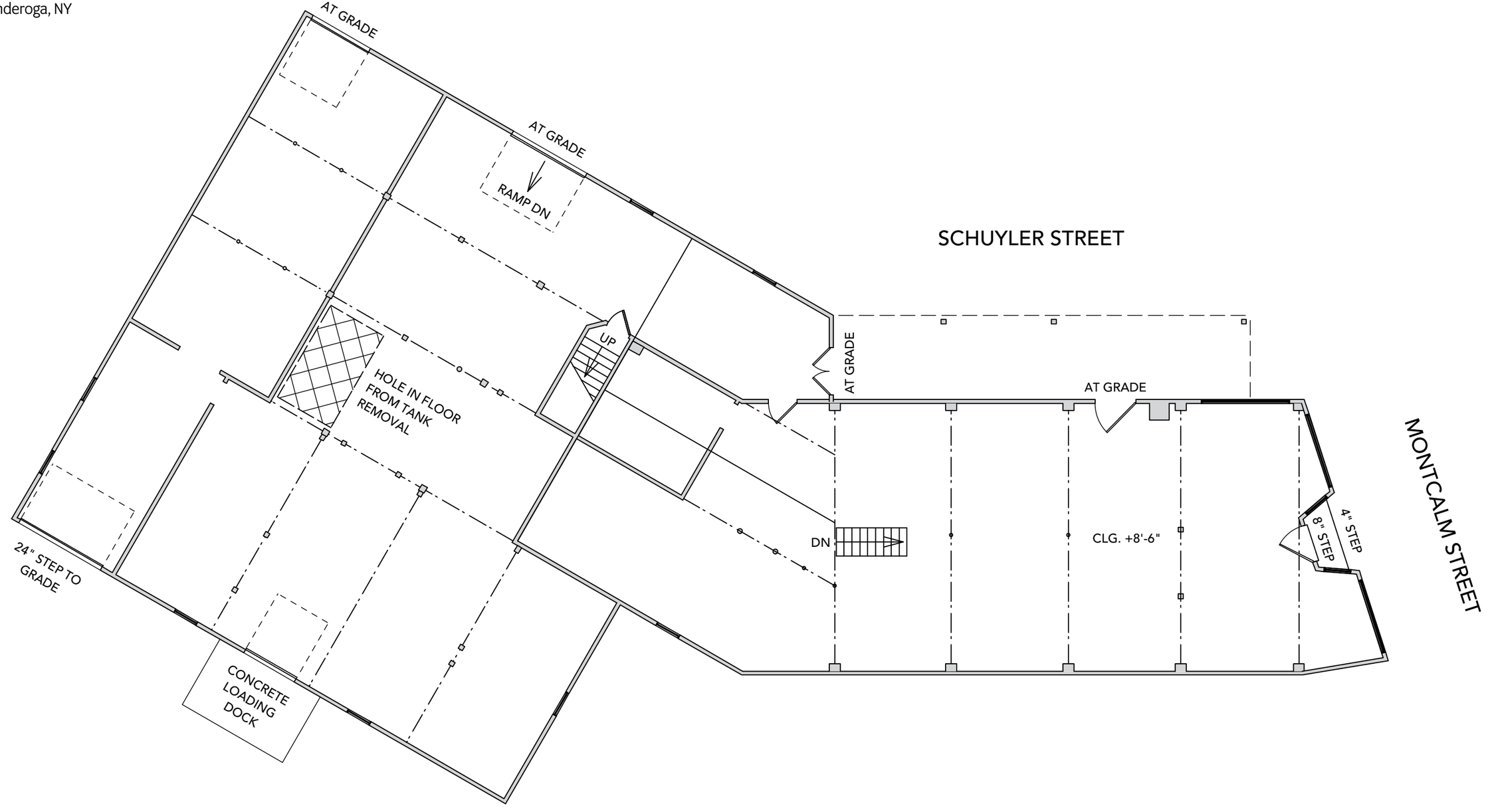
BUILDING RE-USE ANALYSIS

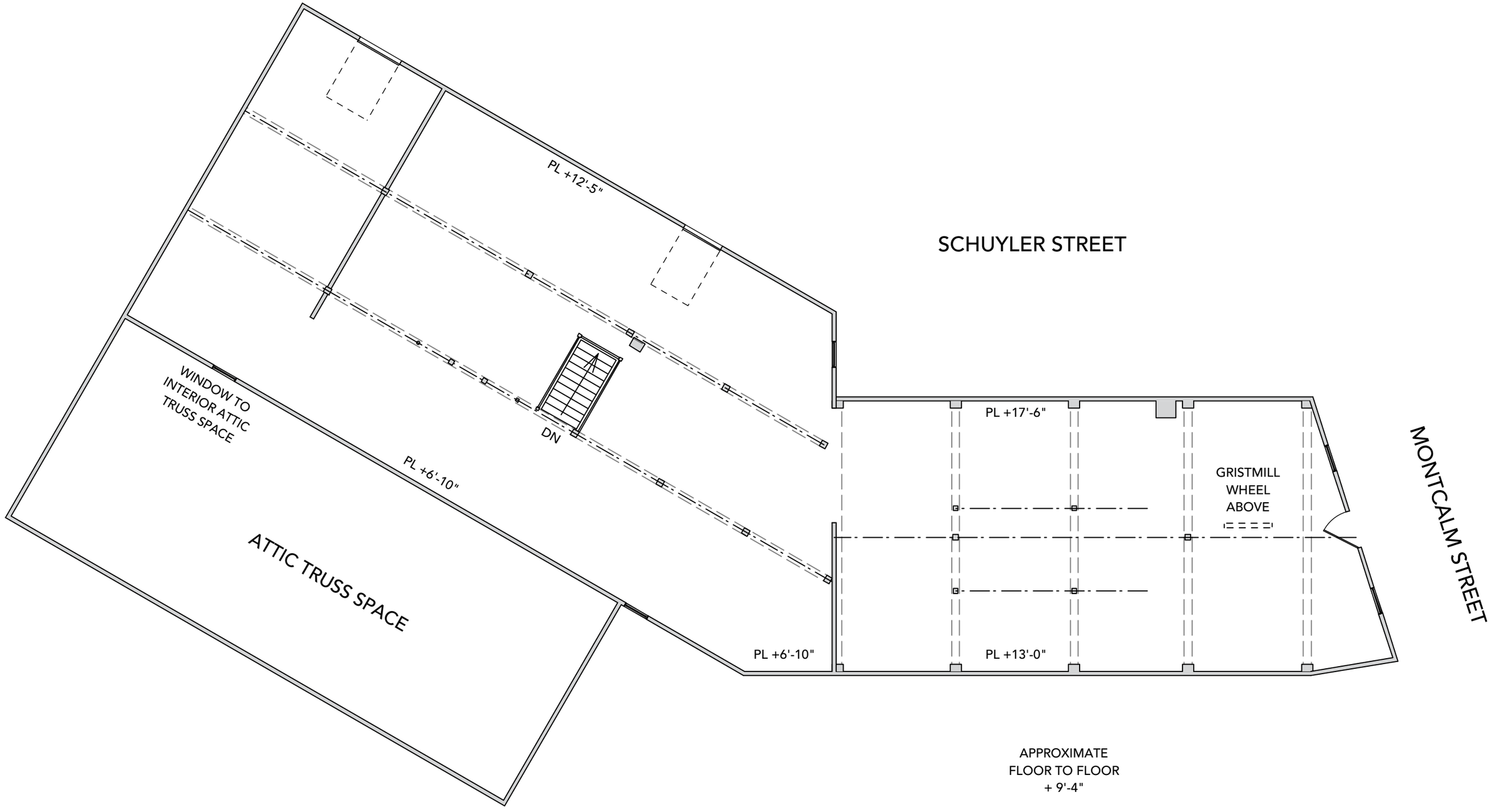
Agway Building
74 Montcalm Street
Ticonderoga, NY



EXISTING FIRST FLOOR PLAN
Scale:3/32" = 1'-0"

0' 2' 4' 6' 8' 10' 12' 16' 20'

N



APPROXIMATE
FLOOR TO FLOOR
+ 9'-4"

EXISTING SECOND FLOOR PLAN

Scale:3/32" = 1'-0"

0' 2' 4' 6' 8' 10' 12' 16' 20'

N

BUILDING RE-USE ANALYSIS

Agway Building
74 Montcalm Street
Ticonderoga, NY

OVERVIEW:

The Agway Building is a prominent and historically significant building being one of the oldest commercial structures standing on Montcalm Street and is related to the history of milling along the LaChute River. It is located at the corner of Montcalm and Schuyler Streets and is highly visible to vehicular and pedestrian traffic serving as a gateway to the downtown core from the west end of Montcalm coming from Route 9N. Constructed in 1879-1880, the building is listed on the New York State National Register of Historic Places. The two-story heavy timber framed structure is approximately 10,000 square feet of mostly vacant storage space. The vacant space demonstrates an opportunity to attract potential commercial and residential tenants, thus increasing the density of the downtown core and maximizing square footage to increase long-term income and ensuring the building's long-term viability.

OUR PROPOSALS:

All of our recommendations would be suitable for a New York Main Street Grant-funded project, and have been developed with The Secretary of the Interior's Standards in mind. We recommend maximizing the amount of leasable square footage for income production to help offset the costs of the required structural stabilization and weatherization. Highest and best uses are based on the market data research provided by Camoin Associates which can be found later in this report.

Floor plan studies for commercial tenant areas take into consideration the effects of the COVID-19 pandemic and include flexible interior seating layouts and exterior seating to increase the allowable capacity and promote social distancing. In addition, the site access in relationship to the building could allow for potential opportunities for an exterior pass through window(s) or curbside pick up service.

We have studied (2) potential options for the first floor space: one utilizing a portion of the first floor for new commercial tenant space with the remainder of the space for the existing building owner's storage needs. An alternate second option utilizes the entire first floor for new commercial tenant space to maximize the income potential for the building. Both options propose second floor residential units with a designated storage area located on the first floor.

Option 1 ~ Country Store

The existing first floor will be reconfigured to create a new commercial tenant area, with entrances from both Montcalm and Schuyler Streets. The Schuyler Street entry is currently flush with existing grade/deck and would serve as a fully accessible entrance. Based on the square footage and the proposed mercantile occupancy, one accessible toilet room is required. A small office and storage space for inventory as well as bikes, kayaks, etc. is located to the south of the retail area and would allow access via the existing stair to the basement for addition storage. Adjacent to the mercantile occupancy on the west side of the building, a new residential entry will be created to allow access from Schuyler Street to the proposed second floor residential units. From this new entry, there will be access to a new residential storage area on the first floor with individual locker storage units. The remainder of the first floor will remain as is and used by the building owner for storage. The covered porch on the west side would remain with exterior seating for patrons, creating interest and activating the streetscape.

Option 2 ~ Restaurant and Brewery

The existing first floor will be reconfigured to create (2) new commercial tenant areas, with the restaurant tenant area having an entrance from Montcalm Street and both tenant areas having an entrance from Schuyler Street. The Schuyler Street entries are currently flush with existing grade/deck and would serve as fully accessible entrances. Based on the square footage and the proposed assembly occupancies, both tenant areas would require two separate accessible toilet rooms. The kitchen for the restaurant will be located between the two tenant spaces and adjacent to the new residential locker storage area. If a larger kitchen area is required, the residential locker storage area could be downsized or eliminated. A pass through could be added from the kitchen to the brewery tenant area for potential collaboration opportunity for both tenants. The covered porch on the west side would remain with exterior seating for restaurant patrons, creating interest and activating the streetscape. We are also proposing exterior seating on the east side of the building for brewery patrons with views to the adjacent LaChute River.

For both options, we propose to create (4) residential units on the second floor working within the constraints of the existing wood framed structural components, heights and remaining historic elements. All proposed units would be market rate apartments with shared washer/dryer facility on the second floor and individual storage locker units on the first floor. A new exterior stair on the east side of the building will allow for a second means of egress and access from the rear parking to the second floor. Residential occupancies are required to be sprinklered. In mixed use occupancies such as this, there are two options: sprinkler the entire building throughout or create a fire separation between the residential and commercial occupancies via a horizontal fire separation. A fire separation will also be required between the different occupancies on the first floor.

We would suggest providing adequate, convenient and safe parking for the upper floor tenants. Ideally two on-site parking spaces per residential unit would ensure the most attractive situation for prospective tenants. There appears to be adequate space on the east side of the property along the LaChute River to provide parking.

COST ESTIMATING:

We are providing the following order-of-magnitude construction cost estimates for the purposes of determining general feasibility of the project, and for pursuing initial funding, tenant and business-plan development.

These are based on our own experience with a wide variety of recent rehab projects in different markets, with different levels of restoration. They do not reflect direct owner involvement and so are not specific in terms of the level of quality for interior and exterior finishes.

Additional elements that can influence project cost include: construction climate, owner schedule, pursuit of historic preservation tax credits, access to grant funding, etc.

INTERIOR RENOVATIONS - OPTION 1: $1,270,000 - $1,550,000

* Cost includes improvements identified on the proposed floor plans for first floor option 1 and upper floor residential units. Also included is structural stabilization and repair work, new MEP systems throughout, a new sprinkler main tie-in and system throughout, insulation of the building envelope, a contingency for asbestos testing and abatement, 5% general conditions and 10% architectural/engineering fees.

INTERIOR RENOVATIONS - OPTION 2: $1,550,000 - $1,900,000

* Cost includes improvements identified on the proposed floor plans for first floor option 2 and upper floor residential units. Also included is structural stabilization and repair work, new MEP systems throughout, a new sprinkler main tie-in and system throughout, insulation of the building envelope, a contingency for asbestos testing and abatement, 5% general conditions and 10% architectural/engineering fees.

EXTERIOR IMPROVEMENTS: $213,000 - $260,000

* Cost includes improvements identified on the facade rendering and proposed floor plans, modest repair work to the existing metal roof, 5% general conditions and 10% architectural/engineering fees.

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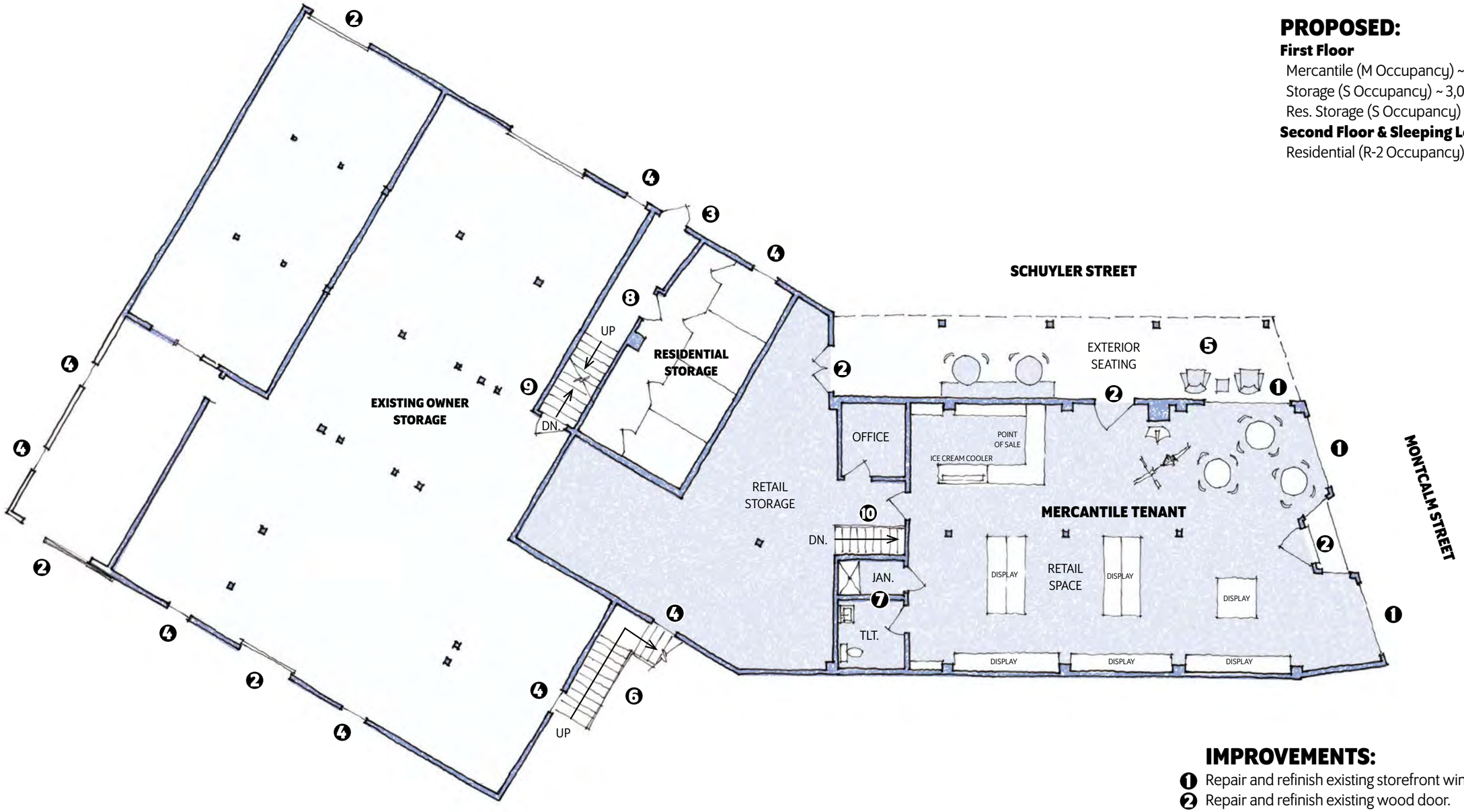
PROPOSED:

First Floor

Mercantile (M Occupancy) ~ 2,100+/- sf
Storage (S Occupancy) ~ 3,050+/- sf
Res. Storage (S Occupancy) ~ 300+/- sf

Second Floor & Sleeping Lofts

Residential (R-2 Occupancy) ~ 4,100+/- sf



PROPOSED FIRST FLOOR PLAN ~ OPTION 1

Scale:3/32" = 1'-0"

0' 2' 4' 6' 8' 10' 12' 16' 20'

N

IMPROVEMENTS:

1. Repair and refinish existing storefront windows.
2. Repair and refinish existing wood door.
3. New wood or aluminum clad wood half glass door.
4. New wood or aluminum clad wood window unit.
5. New wood framed wood deck.
6. New exterior wood framed stair from second floor.
7. New fully accessible toilet room and janitor's closet.
8. New residential entry corridor.
9. New stair for basement access.
10. Existing basement stair.

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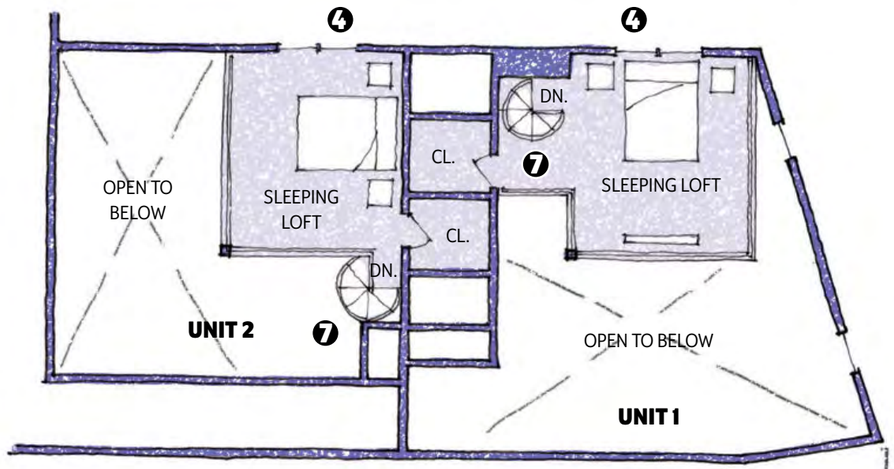
PROPOSED:

Second Floor & Sleeping Lofts
Residential (R-2 Occupancy)

UNITS:

UNIT 1 - 1 bed, 1 bath ~ 1,000+/- sf
UNIT 2 - 1 bed, 1 bath ~ 900+/- sf
UNIT 3 - 1 bed, 1 bath ~ 850+/- sf
UNIT 4 - 2 bed, 1 bath ~ 1,350+/- sf



PROPOSED LOFT PLAN ~ OPTIONS 1&2
Scale:3/32" = 1'-0"
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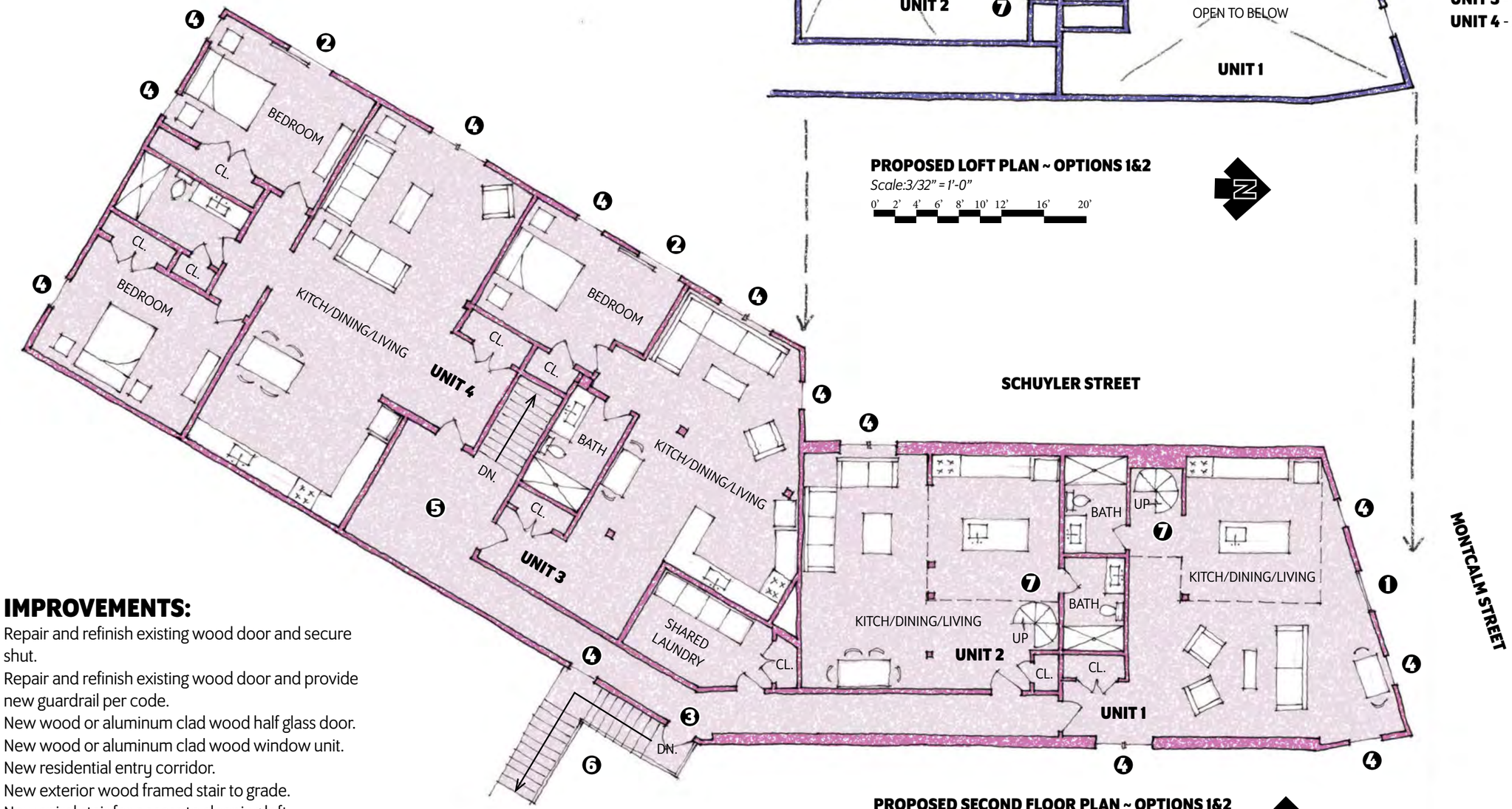

PROPOSED SECOND FLOOR PLAN ~ OPTIONS 1&2
Scale:3/32" = 1'-0"
0' 2' 4' 6' 8' 10' 12' 16' 20'

IMPROVEMENTS:

1. Repair and refinish existing wood door and secure shut.
2. Repair and refinish existing wood door and provide new guardrail per code.
3. New wood or aluminum clad wood half glass door.
4. New wood or aluminum clad wood window unit.
5. New residential entry corridor.
6. New exterior wood framed stair to grade.
7. New spiral stair for access to sleeping loft.

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PROPOSED:

First Floor

Assembly (A-2 Occupancy) ~ 2,100+/- sf
Assembly (A-2 Occupancy) ~ 3,050+/- sf
Res. Storage (S Occupancy) ~ 300+/- sf

Second Floor & Sleeping Lofts

Residential (R-2 Occupancy) ~ 4,100+/- sf

PROPOSED FIRST FLOOR PLAN ~ OPTION 2

Scale:3/32" = 1'-0"

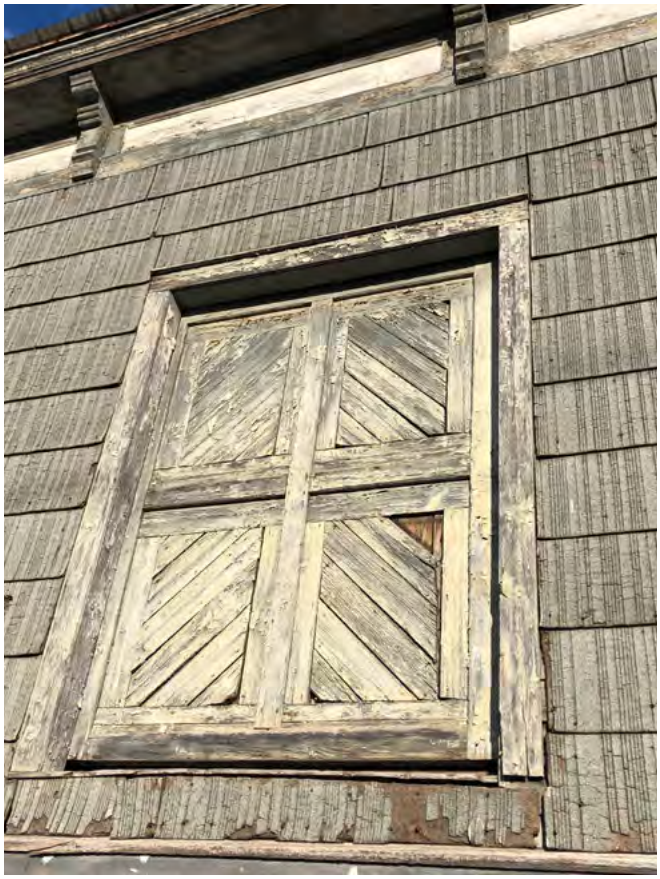
0' 2' 4' 6' 8' 10' 12' 16' 20'

N

IMPROVEMENTS:

1. Repair and refinish existing storefront windows.
2. Repair and refinish existing wood door.
3. New wood or aluminum clad wood half glass door.
4. New wood or aluminum clad wood window unit.
5. New wood framed wood deck.
6. New exterior wood framed stair from second floor.
7. New fully accessible toilet rooms.
8. New residential entry corridor.
9. New stair for basement access.
10. New wood or aluminum clad wood full glass door.

PHOTO GUIDE



FOR
RENT

CONDITION ASSESSMENT

Rathbun Building
110 Montcalm Street
Ticonderoga, NY

General

A simple, rectangular, one-story, brick structure constructed in 1930 initially housing two small businesses. In 1940, Rathbun's Jewelers leased a portion of the building until 1945 when it acquired the entire building. The building is currently unoccupied and is being used during the summer months for the owner's imported olive oil packaging and shipping business.

Exterior

Roof ~ The roof is not visible from grade and was not accessed. Evidence of some water damage in the attic ceiling space would indicate that there are a potential breaches in the roof system that need to be addressed. Per our discussions with the building owner, the roof is at the end of it's useful life and is in need of replacement.

Rainwater Collection ~ Per our discussions with the owner, rainwater is collected by a single roof drain and carried down via an internal, vertical roof leader pipe and tying into the existing sewer system.

Exterior wall finish ~ The building exterior is brick with simple geometric brickwork with vertical and horizontal bands of raised brick. The brick on the south side has been covered with a painted, stucco-like finish and a band of corrugated metal along the top. All exterior finishes are in very good to good condition with some minor repair/repointing required.

Windows ~ The storefront windows are plate glass units with copper frames sitting atop brick knee walls with centered, ornate iron grilles. This system is apparently original and in very good to good condition. There are two window openings on the south side of the building that have been infilled with plywood panels, in good condition, exposed on the exterior.

Doors ~ The building originally had two recessed entries in the storefront, north side of the building. Over time, the entry door to the west was removed and has been infilled with a modern wood framed wall and fixed window. The east door is an apparently historic, full glass, wood door in good condition with some typical wear and weathering. On the south side of the building, there is a recessed panel, painted, wood door in good condition.

Interior

Flooring ~ Commercial carpeting extends through the two larger spaces on the north side of the building. There are a few areas where the carpet was removed to allow for structural repairs to the floor system and particle board is exposed. The remainder of the spaces are finished with sheet vinyl flooring. All flooring is in poor condition.

Walls ~ Visible from the attic space, the original interior wall finish is plaster/gypsum board in fair condition with evidence of fire, smoke and water damage. Below the ceiling, wood panel, wall paper/vinyl panels and gypsum board have been installed over the original wall finish. These finishes are in good to fair condition. There is an apparently original or historic, recessed wood and glass panel wall or door partially exposed and visible from the northeast room.

Ceilings ~ Dropped ceilings have been installed throughout the building. These are constructed of 2x wood framing with a plaster/gypsum board substrate and finished with square 12"x12" tiles. All ceilings are in good condition with some water staining in a few locations. Above the dropped ceilings, the finish

on the underside of roof structure is a combination of wood plank and plaster/gypsum board in good to fair condition with some water staining. In the ceiling cavity above the northeast room, there is some apparently original or historic wood cornice moulding in good condition that could be exposed or salvaged and reused somewhere within the building.

Structure

Foundation ~ The foundation wall system is not visible from the exterior of the building and the crawlspace was not accessed. Per our discussions with the owner, the foundation has suffered some deterioration due to water damage near the northwest corner of the crawlspace and is in need of repair.

Superstructure ~ The existing structural system is not visit from the interior and the crawlspace was not accessed. The floor system slopes down from east to west and per the owners, some repairs have been made to provide shoring. However, the building is stable with no apparent major structural concerns.

Insulation

No insulation was visible from the areas that were accessed.

MEP Systems

MEP system evaluation should be performed by engineers licensed to work in the governing jurisdiction.

Overall Condition Assessment: Good

Anticipated Cost Of Repair Work: $$

FACADE RECOMMENDATIONS

Rathbun Building
110 Montcalm Street
Ticonderoga, NY

Historic Photograph

Itemized Scope:

We recommend a complete, and historically appropriate, restoration of the Montcalm Street facade. Recommendations are shown in part on the facade sketch. These include:

1. Clean and restore existing copper storefront windows
2. Uncover existing signboard zone and refinish/repair as required. If beyond repair, install new painted fiber cement panel and trim signboard
3. Provide a new fabric awning with a singular complimentary color
4. New wall mounted fiber cement mural panels anchored to masonry wall
5. New raised sign lettering pin mounted to masonry
6. New linear light fixture (uplighting signage)
7. Repair and repoint existing face brick (typical)
8. New concrete ramp at recessed entry
9. Refinish existing wood entry door
10. New wall mounted pin light fixtures
11. New perpendicular signage
12. OPTIONAL rear seating area with lighting
13. OPTIONAL front seating area with new concrete sidewalk extension and curbing.

Existing Conditions

Paint Selections:

SW7598 SIERRA REDWOOD

SW6461 ISLE OF PINES

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BUILDING RE-USE ANALYSIS

Rathbun Building
110 Montcalm Street
Ticonderoga, NY

OVERVIEW:
The Rathbun Building is a historically significant building and a contributing member of the continuous street wall on the south side of Montcalm Street. It is highly visible to vehicular and pedestrian traffic with the east facade serving as a billboard within the downtown core when approached from the east on Route 22. Constructed in 1930, the building is not currently listed on the New York State National Register of Historic Places. The one-story brick structure is approximately 1,100 square feet of vacant space. The vacant space demonstrates an opportunity to attract potential commercial tenants, thus increasing the density of the downtown core and maximizing square footage to increase long-term income and ensuring the building's long-term viability.

OUR PROPOSALS:
All of our recommendations would be suitable for a New York Main Street Grant-funded project, and have been developed with The Secretary of the Interior's Standards in mind. Highest and best uses are based on the market data research provided by Camoin Associates which can be found later in this report.

Floor plan studies for commercial tenant areas take into consideration the effects of the COVID-19 pandemic and include flexible interior seating layouts and exterior seating to increase the allowable capacity and promote social distancing. In addition, the site access in relationship to the building could allow for potential opportunities for an exterior pass through window or curbside pick up service.

We are proposing to moderately reconfigure the first floor to create a new commercial tenant area for a cafe/restaurant occupancy with various seating options. The existing concrete step on the east entry will be removed and a new sloped walk created to allow for an accessible entrance to the maximum extent possible while keeping the existing historic storefront windows intact. Based on the square footage and the proposed assembly occupancy, two toilet rooms are required, we are proposing both toilet rooms to be unisex with one being fully accessible. The rear, south, portion of the building will remain as support space for the cafe/restaurant. We have proposed two options for exterior seating to create interest and activate the streetscape. The first option creates a small parklet on Montcalm Street extending into the existing street the width of the building and could allow for approximately (3) tables. This option would require coordination with the Town for reconfiguration/relocation of utilities, curb cuts, etc. The second option creates a small sunken area on the east side of the building accessed through a new door on the same side. Coordination with the adjacent parking lot owner would be required to buy or lease the space and reconfigure a portion of the existing parking lot layout.

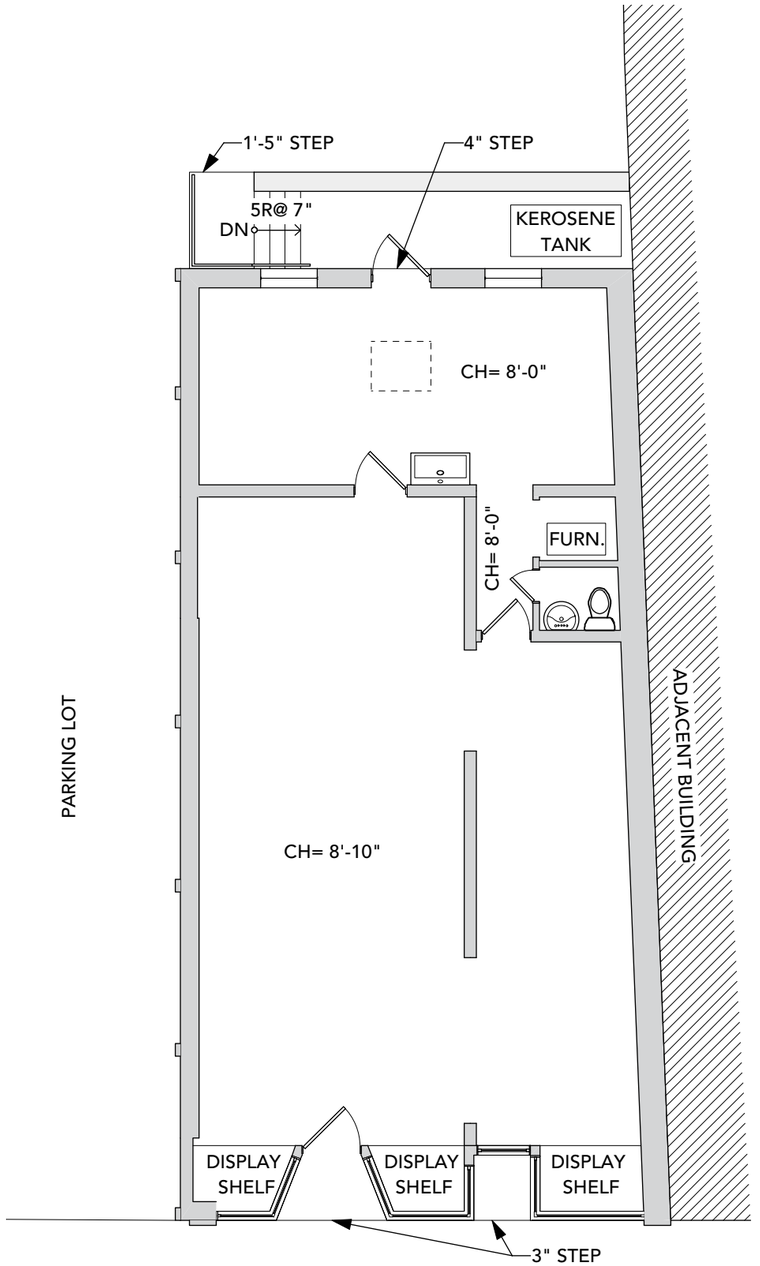
COST ESTIMATING:
We are providing the following order-of-magnitude construction cost estimates for the purposes of determining general feasibility of the project, and for pursuing initial funding, tenant and business-plan development.

These are based on our own experience with a wide variety of recent rehab projects in different markets, with different levels of restoration. They do not reflect direct owner involvement and so are not specific in terms of the level of quality for interior and exterior finishes.

Additional elements that can influence project cost include: construction climate, owner schedule, pursuit of historic preservation tax credits, access to grant funding, etc.

INTERIOR RENOVATIONS : $127,000 - $155,000
* Cost includes improvements identified on the proposed floor plan. Also included is a modest cost for structural stabilization and repair work, new MEP systems throughout, site work for Montcalm Street seating option, insulation of the building envelope, a contingency for asbestos testing and abatement, 5% general conditions and 10% architectural/engineering fees.

EXTERIOR IMPROVEMENTS: $45,000 - $55,000
* Cost includes improvements identified on the facade rendering and proposed floor plans, a new membrane roof system, 5% general conditions and 10% architectural/engineering fees.



EXISTING FIRST FLOOR PLAN
Scale: 1/8" = 1'-0"

0' 2' 4' 6' 8' 10' 12' 16' 20'

N

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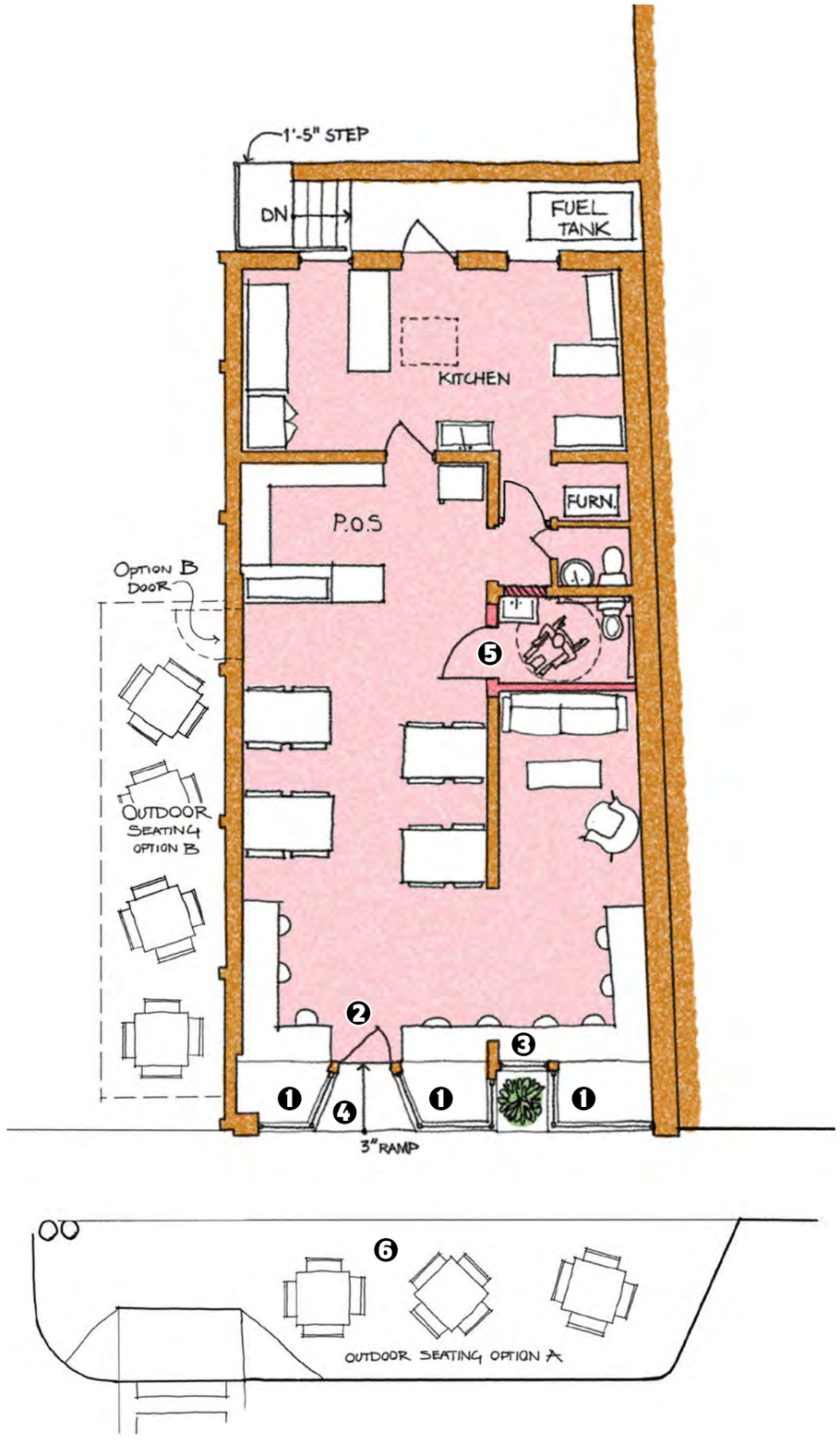
PROPOSED:

First Floor

Assembly (A-2 Occupancy) ~ 1,100+/- sf



PROPOSED FIRST FLOOR PLAN

Scale: 1/8" = 1'-0"

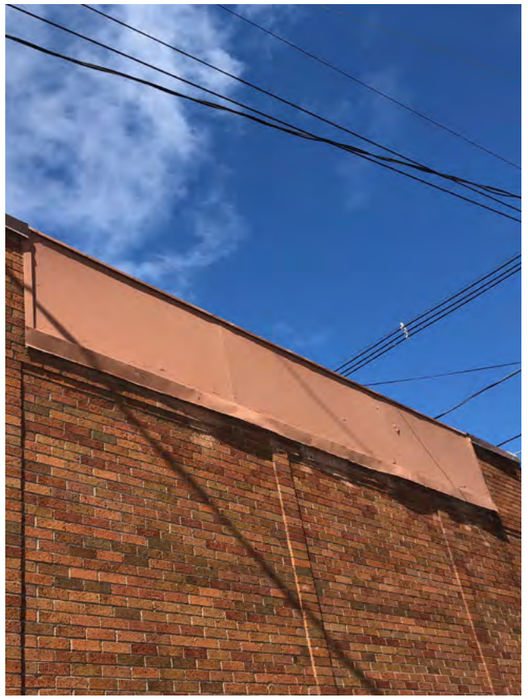
0' 2' 4' 6' 8' 10' 12' 16' 20'

N

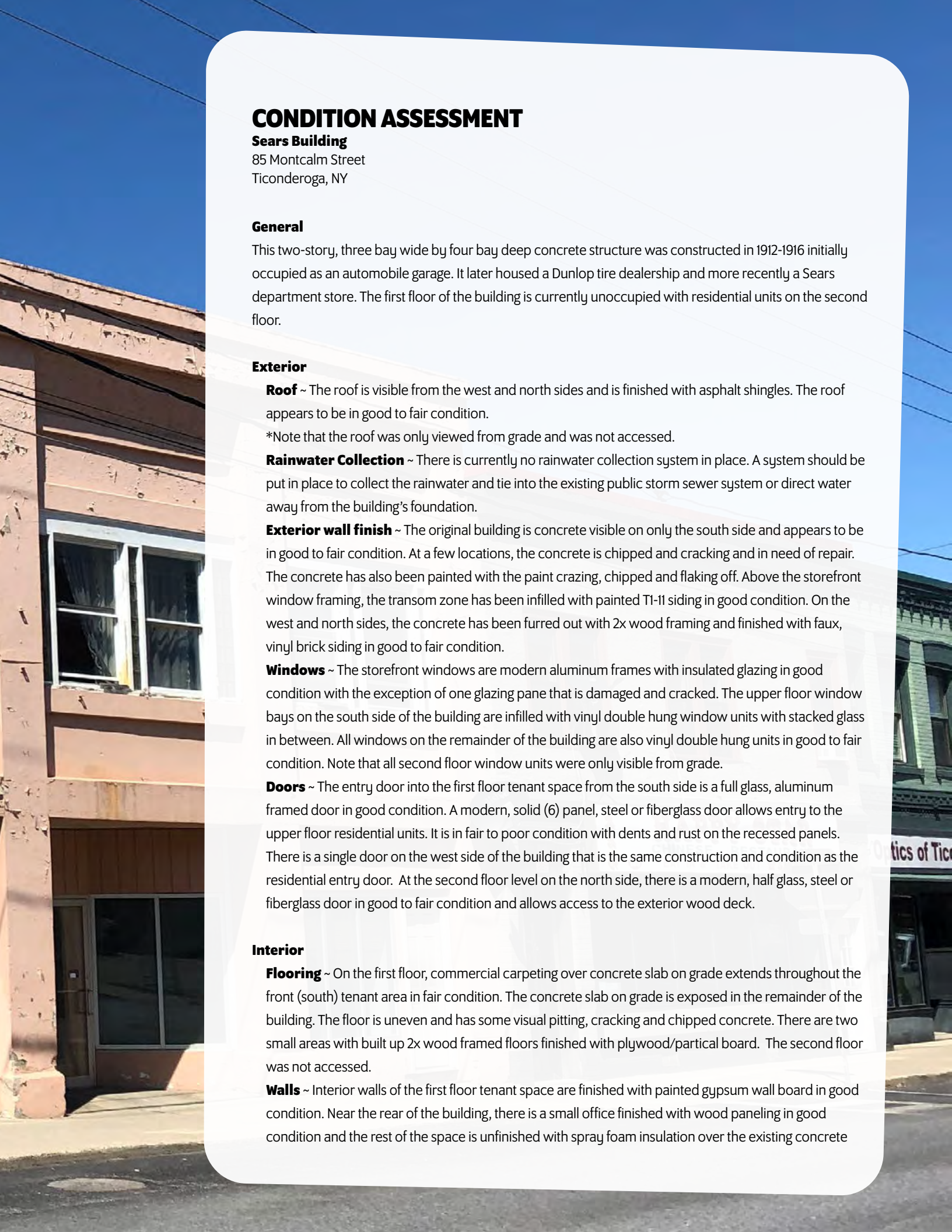
IMPROVEMENTS:

1. Clean and restore existing storefront windows.
2. Repair and refinish existing wood door.
3. New wood or aluminum clad wood window unit.
4. New concrete entry ramp.
5. New fully accessible toilet rooms.
6. New concrete sidewalk extension for outdoor seating.

PHOTO GUIDE



PUBLIC
PARKING
ONE WAY
TRAFFIC
FOR
RENT



CONDITION ASSESSMENT

Sears Building
85 Montcalm Street
Ticonderoga, NY

General

This two-story, three bay wide by four bay deep concrete structure was constructed in 1912-1916 initially occupied as an automobile garage. It later housed a Dunlop tire dealership and more recently a Sears department store. The first floor of the building is currently unoccupied with residential units on the second floor.

Exterior

Roof ~ The roof is visible from the west and north sides and is finished with asphalt shingles. The roof appears to be in good to fair condition.

*Note that the roof was only viewed from grade and was not accessed.

Rainwater Collection ~ There is currently no rainwater collection system in place. A system should be put in place to collect the rainwater and tie into the existing public storm sewer system or direct water away from the building's foundation.

Exterior wall finish ~ The original building is concrete visible on only the south side and appears to be in good to fair condition. At a few locations, the concrete is chipped and cracking and in need of repair. The concrete has also been painted with the paint crazing, chipped and flaking off. Above the storefront window framing, the transom zone has been infilled with painted T1-11 siding in good condition. On the west and north sides, the concrete has been furred out with 2x wood framing and finished with faux, vinyl brick siding in good to fair condition.

Windows ~ The storefront windows are modern aluminum frames with insulated glazing in good condition with the exception of one glazing pane that is damaged and cracked. The upper floor window bays on the south side of the building are infilled with vinyl double hung window units with stacked glass in between. All windows on the remainder of the building are also vinyl double hung units in good to fair condition. Note that all second floor window units were only visible from grade.

Doors ~ The entry door into the first floor tenant space from the south side is a full glass, aluminum framed door in good condition. A modern, solid (6) panel, steel or fiberglass door allows entry to the upper floor residential units. It is in fair to poor condition with dents and rust on the recessed panels. There is a single door on the west side of the building that is the same construction and condition as the residential entry door. At the second floor level on the north side, there is a modern, half glass, steel or fiberglass door in good to fair condition and allows access to the exterior wood deck.

Interior

Flooring ~ On the first floor, commercial carpeting over concrete slab on grade extends throughout the front (south) tenant area in fair condition. The concrete slab on grade is exposed in the remainder of the building. The floor is uneven and has some visual pitting, cracking and chipped concrete. There are two small areas with built up 2x wood framed floors finished with plywood/partical board. The second floor was not accessed.

Walls ~ Interior walls of the first floor tenant space are finished with painted gypsum wall board in good condition. Near the rear of the building, there is a small office finished with wood paneling in good condition and the rest of the space is unfinished with spray foam insulation over the existing concrete

structure. The second floor was not accessed.

Ceilings ~ An acoustical ceiling tile and suspended grid system has been installed in the first floor, south tenant area. The system is in good to fair condition with some damaged tile from either second floor plumbing fixture or roof leaks. The small office area is finished with wood paneling. At the rear of the building, the historic pressed metal ceilings and cornice trim is mostly intact with some rusting and areas where the panel has been removed or has deteriorated over time. The same pressed metal is visible above the dropped ceiling in the tenant area. The second floor was not accessed.

Structure

Foundation ~ Being that the building is a concrete slab on grade system and grade is relatively level along the perimeter of the building, the foundation wall system is not visible from the interior or exterior.

Superstructure ~ Multi bay, reinforced concrete post and beams extend the perimeter of the building. The first floor is concrete slab on grade. The second floor is heavy timber with beams spanning the width of the building from east to west and floor joists spanning from beam to beam north to south. Irregularly spaced modern steel columns have been installed below the beams. These were likely added for additional support of the beams above due to deflection/condition issues or there were original columns that were removed. The second floor was not accessed, our assumption is that the roof system is also heavy timber construction. Overall the building is stable with no apparent major structural concerns.

Insulation

In locations where the exterior wall is unfinished and exposed, spray foam insulation has been installed.

MEP Systems

MEP system evaluation should be performed by engineers licensed to work in the governing jurisdiction.

Overall Condition Assessment: Good

Anticipated Cost Of Repair Work: $$

FACADE RECOMMENDATIONS

Sears Building
85 Montcalm Street
Ticonderoga, NY

Itemized Scope:

We recommend a complete, and historically appropriate, restoration of the Montcalm Street facade. Recommendations are shown in part on the facade sketch. These include:

1. Repair & refinish existing concrete structure
2. Remove existing faux brick vinyl siding
3. New fiber-cement infill panels
4. New fiber-cement rain screen panels
5. New wood or aluminum clad wood window units (x9)
6. New wood or aluminum clad wood half glass door
7. New wood or auminum clad wood full glass door
8. Wood screen fence around utilities/garbage bins
9. Individual signboard lettering mounted to existing concrete structure
10. Linear lighting fixture above signage (downlight)
11. New perpendicular sign with attached LED lighting
12. TICONDEROGA mural painted directly onto surface of fiber cement panels
13. New wood or aluminum clad wood storefront windows (x9)
14. New aluminum cap flashing
15. New (3) color paint scheme

Historic Photograph

Existing Conditions

Paint Selections:

SW6807 WONDEROUS BLUE

SW6810 LUPINE

SW7170 ACIER

COST ESTIMATING:

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Additional elements that can influence project cost include: construction climate, owner schedule, pursuit of historic preservation tax credits, access to grant funding, etc.

EXTERIOR IMPROVEMENTS: $106,000 - $129,000

* Cost includes improvements identified on the facade rendering, 5% general conditions and 10% architectural/engineering fees.

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EXISTING FLOOR PLAN

Sears Building
85 Montcalm Street
Ticonderoga, NY

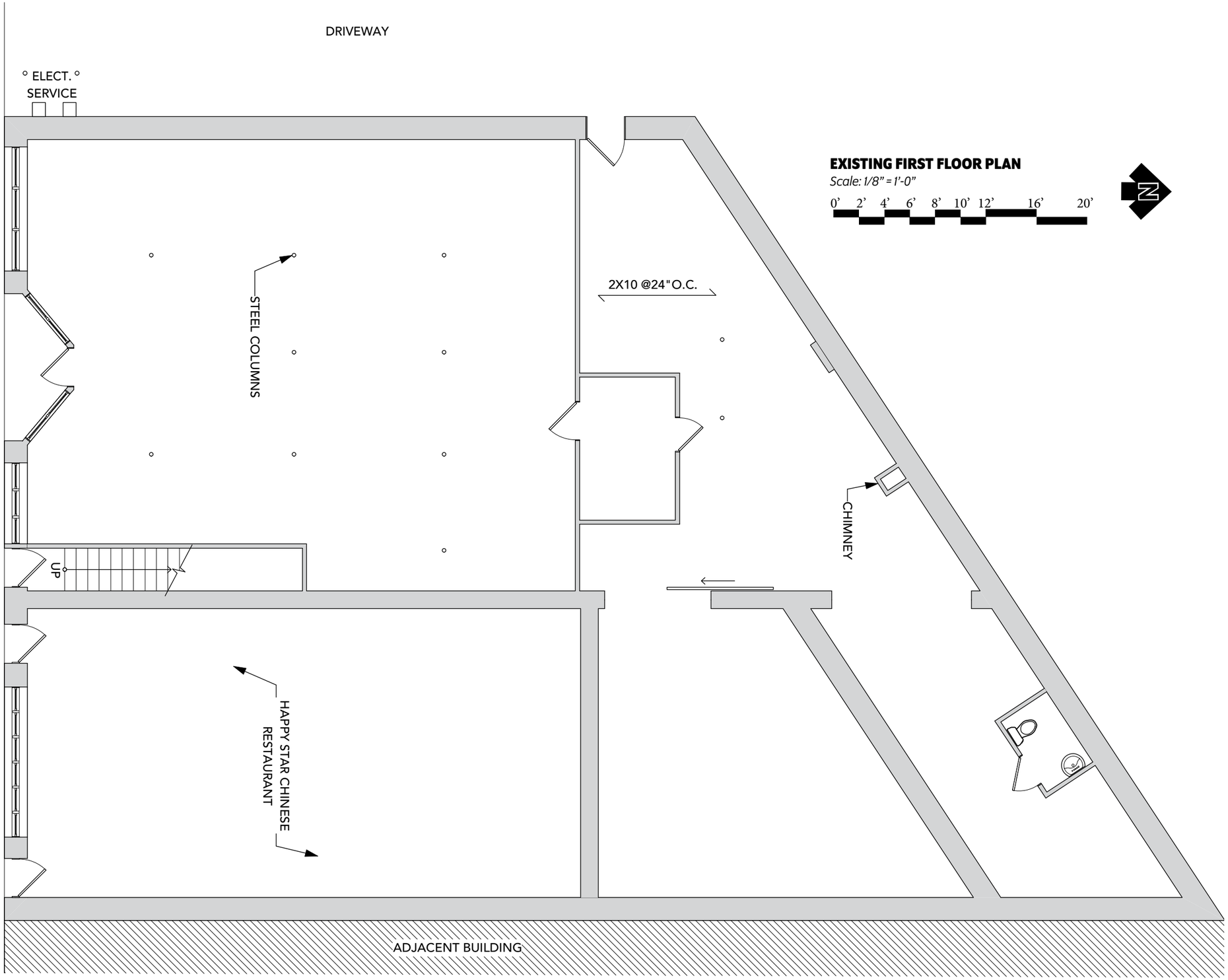

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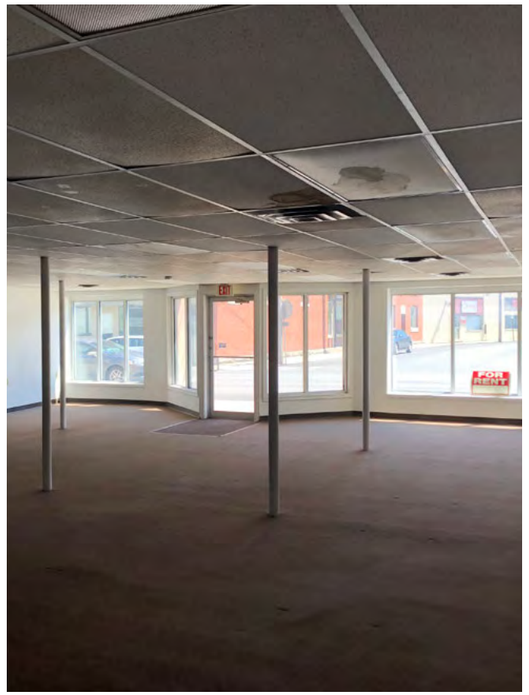
PHOTO GUIDE



TICONDEROGA MARKET ANALYSIS

Ticonderoga, NY

JULY 2020

PREPARED BY:

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ABOUT CAMOIN 310

Camoin 310 has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin 310 has served EDOs and local and state governments from Maine to California; corporations and organizations that include Amazon, Lowes Home Improvement, FedEx, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of $6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to over 1,000 projects in 40 states and garnered attention from national media outlets including Marketplace (NPR), Crain's New York Business, Forbes magazine, The New York Times, and The Wall Street Journal. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. We are based in Saratoga Springs, NY, with regional offices in Richmond, VA; Portland, ME; Boston, MA; and Brattleboro, VT. To learn more about our experience and projects in all of our service lines, please visit our website at www.camoinassociates.com. You can also find us on Twitter @camoinassociate and on Facebook.

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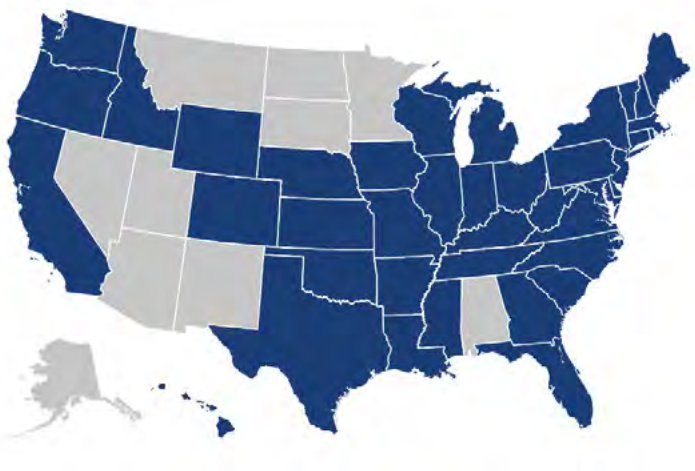

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KEY MARKET FINDINGS

Camoin 310, in partnership with In.Site.Architecture, has been retained to conduct a market analysis and building reuse feasibility study of three Ticonderoga properties and develop strategies to support revitalization across downtown Ticonderoga, particularly along the Montcalm corridor.

This section highlights findings from the market analysis, which includes the following subsections:

- Demographic and Socioeconomic Profile
- Economic Base Analysis
- Retail Market Analysis
- Tourism Market Analysis

MARKET ANALYSIS FINDINGS

The Town of Ticonderoga and Essex County are faced with a declining and aging population which coincides with historical declines in industry. While income figures for the town and county remain below the state average, it is important to note that the region experiences an influx of visitors and high-income earners during the tourism season. Continuing to attract second homeowners and visitors, while building amenities for local residents is critical to the survival of the town's economy.

Ticonderoga's economy is highly reliant on Manufacturing with the industry constituting 44% of the total Gross Regional Product and 20% of the total jobs. This high concentration creates a challenge for Ticonderoga because historical losses in manufacturing have had serious negative implications on the economy and the town continues to be vulnerable to future changes in this industry. At the same time, there are opportunities to capitalize on the town's strength and history in manufacturing, while diversifying the economy, by focusing on emerging subsectors and sparking innovation and entrepreneurship.

Ticonderoga serves as a hub for jobs in the region. However, many of the high paying jobs in the Pulp, Paper, and Goods Manufacturers industry are held by people who live outside of the Ticonderoga community. For example, approximately 104 of the 183 Paper Goods Machine Setter, Operators, and Tenders in the town are held by people who commute into Ticonderoga for work. Reversing this and turning a portion of these commuters and others in high-earning occupations into residents would help to capture their spending power at local businesses.

The retail market analysis shows that there is not enough unmet demand to support a full new business in the downtown area in any one retail category that is solely dependent on local spending power (i.e., based on households living in the local area). Regionally, however, there is enough demand to support businesses in the retail categories of eating places, clothing stores, grocery stores, health and personal care stores, sporting goods and hobby stores, and others. Based on this analysis, new retail offerings in downtown Ticonderoga will need to offer a unique product or combination of products that serves local residents, customers from the broader region, and tourists. Consumer preference indicators show a propensity to shop for American-made products. Consumers also value price over brand and will look to use coupons. In terms of restaurant spending, consumer data shows that lower price points were favored, with occasional spending at family restaurants or steakhouses. Restaurant options that are priced affordably with takeout options, and that are differentiated from what already exists in the market, have the greatest potential to perform best with existing consumer preferences.

Tourism activity in the Ticonderoga region ranges from recreational uses of the vast Adirondack Park, to enjoying Lake George and Lake Champlain, as well as to the opportunity to visit landmarks integral to American history. Mixed in with these resources is the quirky, and quite notable, original series set tour of Star Trek, tucked away on Montcalm Street. With a wealth of tourism assets in the region, the limited supply of hotel rooms in the immediate area does limit the amount of time and money that individuals and families will spend in Ticonderoga and on Montcalm Street. There are prospects for new accommodations in town, including plans for a boutique hotel in the Cobbler's Bench building at 116 Montcalm Street. Additionally, Fort Ticonderoga plans to invest approximately $70 million over several years in a capital campaign to add a hotel on site, wedding venue/meeting space, new museum facility, additional food and beverage options, and increased recreational experiences. This investment will have spillover effects on downtown's economy, as local businesses seek to capture additional visitors and associated spending. It is critical to continue supporting and growing the business mix and offerings now and leverage the massive capital campaign being proposed at the Fort to attract investment and potential business owners. While the physical improvements to the Fort are likely still years down the road, the Town can capitalize on the proposed project to catalyze investment now on Montcalm Street.

PROPOSED BUILDING USES

The recommendations in this report reflect a combination of factors including national and regional demographic, real estate, and consumer trends, and local input. While the recommendations seek to leverage the physical resources and assets within Ticonderoga, the human element of enacting the recommendations and following through from planning to implementation is not an easy transition. Even a business with the strongest market potential requires an individual that is willing to take a risk and make the sacrifices necessary to start a small business. The pipeline of entrepreneurs cultivating small business potential is not independent of downtown revitalization efforts. Inspiring the community to see themselves as part of the Ticonderoga's resurgence is part of the revitalization process.

RETAIL CONTEXT

Success of downtown retail is dependent on a modern approach that coincides with the changing nature of retail, consumer preferences, and the spaces where families, individuals and communities reside and interact. Favoring experiential opportunities, services, and recreational activities and building a positive online presence makes it possible for small retail establishments to be successful, while simultaneously building in-person culture and vibrancy for the community. An online audit was completed as part of the research for this market analysis and it was found that businesses along Montcalm Street did appear to have a visible presence on social media like Facebook and included updates for menus, services, or changes to hours – all especially important through the COVID-19 crisis.

At this moment it is difficult to predict the exact changes to retail from the public health crisis. However, activities that consumers have become accustomed to will likely remain, such as curbside pick-up, expanded delivery options, and online transactions. Continued curbside pickup will have impacts on parking availability and the flow of traffic on Montcalm Street and a prolonged shift to online shopping may cause smaller retailers to consider whether a bricks and mortar store is worth the overhead costs if they are able

"RETAILERS CAN'T AFFORD TO BE IN A WAIT-AND-SEE MODE. FIRST, THEY NEED TO REIMAGINE THEIR BASELINE REQUIREMENTS AND THEN TURN THEIR ATTENTION TO TAKING THEIR CUSTOMER SERVICE TO THE NEXT LEVEL."

Harvard Business Review, July 6, 2020

to grow their presence online. The Harvard Business Review writes that consumers have considerable expectations for both online and in-store experiences, preferences that were shifting prior to COVID-19 and have now been accelerated. Online, consumers will be more demanding of digital platforms and "no longer tolerate a sub-par digital shopping experience like they may have before the crisis." Facing a major public health threat, consumers must see the value in returning to a store or an event at a bricks-and-mortar shop.[1]

Retailers are repositioning themselves to navigate the changing shopping environment as consumers are drawn not just to a singular store or a singular good, but rather an opportunity to connect and experience a location with all five senses. Today's retail market is hyper-competitive and challenging for new entrants.

This era of retail includes strategies that:

1. Reach a regional audience,
2. Sell both online and at brick and mortar stores,
3. Carefully consider local demographics to meet local and regional demand, and
4. Provide an authentic local experience through products and services.

Retail thrives on density and the right business mix. While Montcalm Street is relatively compact and is already the hub for small business retail activity in Ticonderoga, maintaining the focus on filling ground floor commercial spaces in locations where retail already exists and drives traffic, as opposed to other locations around Ticonderoga, will continue to build the necessary density to reinforce foot traffic and drive business to the variety of retailers.

With Walmart in relative proximity to Montcalm Street, this corridor must have a distinct identity from the big box retailer and other chain retail and service providers in the local market area. Walmart will continue to sell a variety of products with a great selection and affordable price point. It will be difficult and futile for a business on Montcalm to compete with Walmart on these factors. However, what Walmart cannot offer is the experience of Ticonderoga's historical buildings, refined customer service, and local merchants who run a range of businesses that showcase local talent and expertise.

GETTING "RETAIL READY"

While Ti-Alliance and other stakeholders can encourage particular types of businesses to take a chance on opening in Ticonderoga, there is a parallel effort needed to support general business development and business friendliness that Ti-Alliance and its other downtown organizations should promote across platforms. The goal is to ultimately set the stage for new businesses by offering tools, local expertise, municipal support where necessary, in a downtown environment that enables entrepreneurs and small business owners to thrive in any sector.

[1] Yohn, Denise Lee. "The Pandemic is Rewriting the Rules of Retail", *The Harvard Business Review*. July 7, 2020.

Recruiting retailers (including food and beverage) to a community is challenging work that relies on a foundation of being "retail ready."[2] The chart to the right indicates the three stages of becoming retail ready before attraction is likely to be successful. First, the **organizational capacity** to follow through on leads and build relationships with regional businesses and brokers is critical. This could be a dedicated individual but is likely a combination of organizations and people with a single point person to direct and manage this work. Second, the **retail environment** must meet certain standards to encourage business development and pedestrian activity. This would include things like whether the street is clean and safe, or if there is access or adequate signage for parking, or if the sidewalks are wide enough for multiple parties to travel. The standards for the retail environment can vary community to community so it is important to define this criteria specific to Ticonderoga. Lastly, the most advanced stage is phase three, **improving tenant mix** through retail attraction and retention. This phase requires ongoing property owner engagement, discussion with developers, ensuring there is adequate space in good condition for potential businesses, and of course, customers to fuel retail growth. These initiatives may be addressed in a non-linear fashion as resources and staff capacity are available. This report advances the understanding of the town's physical assets, along with the market profile and can be used to communicate opportunities with prospective businesses. Continuing to foster both Phase I and Phase II will translate into more opportunities for positive retail growth.

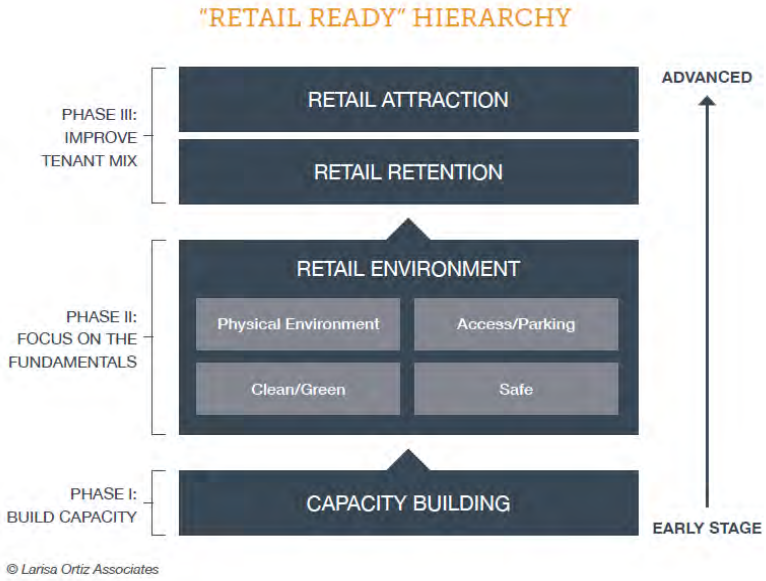


Figure 1: Improving Tenant Mix, *Larisa Ortiz, 2014*

TARGET CONSUMER MARKET

- **Capturing day trippers from VT/NY within an hour drive** – Right in Ticonderoga's backyard, the Adirondacks attracts up to 12.4 million visitors a year. Closer to home, Fort Ticonderoga attracts over 75,000 visitors on an annual basis. With established annual tourism, Ticonderoga has the opportunity to reach a greater number of visitors and provide them with a "value proposition" for why they should visit not just one site in town, like the Star Trek set or the Fort, but why they should also spend time on Montcalm Street browsing and wandering. In addition to the visitors from the Adirondacks, Ticonderoga has the benefit of proximity to select Vermont markets to draw from as well.

  Day trippers are especially important, considering the lasting impacts of COVID-19 on how far people are willing to travel and what mode of transportation they will take. Travelers are projected to take regional trips to destinations that can be reached via car as opposed to train or plane, meaning marketing efforts should be centered around a drivable distance to the town.

[2] Adapted from "Improving Tenant Mix", *Larisa Ortiz, 2014*

- **Local senior population** – With the number of households 65+ rising in the region over the next five years, attracting a business that fulfills the needs of the aging population is a viable market-led business development strategy. The Baby Boomer generation is working longer, taking on second and third careers and generally staying active longer, both in a working or volunteer capacity, but also in terms of getting outdoors and enjoying natural resources.
- **Retirees or those returning to Ticonderoga –** Interviews revealed that the region has a fair number of residents that have returned to the area after retiring or otherwise transitioning their working lives. This group generally has relatively high spending power. While an individual establishment would likely not survive by catering only to this group, a store that recognizes the range of income levels in the area will be more likely to capture additional spending.
- **Groups visiting the Fort and Star Trek** – Fort Ticonderoga and Star Trek Original Series Set Tour are the two largest tourism assets in Ticonderoga by number of visitors. Visitors to Fort Ticonderoga include a mix of military individuals, young professionals, retirees, and families while the Star Trek set attracts devotees of the show from various age ranges. The proposed investments to the Fort property and Star Trek facility will increase family visitation and create a larger customer base for Ticonderoga to capitalize on. Creating family friendly retail, restaurant, and recreation opportunities in downtown Ticonderoga will help to draw this demographic downtown after or before their visit to the Fort and Star Trek.
- **Outdoor recreation enthusiasts** – Ticonderoga is located nearly halfway between Lake George and Lake Placid. These are two of the region's busiest summer visitation hotspots with attractions for a range of outdoor enthusiasts. While the downtown corridor is about 20 minutes from the Northway, continuing to build up a density of activities, retail, programming and restaurants could capture a portion of the visitors who traverse the Adirondacks during the summer.
- **Grow the population base to increase demand for local businesses** - Retailers choose their locale based on careful evaluation of their profit potential based on market factors. Without the demand to generate a profit, they are going to take their business elsewhere. Increasing demand for local goods and services can happen at three levels:

    1. Increasing the percentage of local spending done by current residents,
    2. Increasing visitation, and
    3. Increasing the residential base.

  While the precise data is still out on exactly how the COVID-19 crisis will impact commercial, housing and retail activity, the initial predictions include an increasing preference for less dense areas, not just for health and safety reasons, but for individuals, families, or businesses seeking a different lifestyle than a dense urban center can offer. While a shift to small cities and towns is a pattern noted by economic developers, these are still somewhat urban centers that have a density of goods, retail, entertainment, and activities for a range of families and individuals.

  Although housing cost per square foot is typically less expensive outside of urban centers, the lack of diversity in options, especially rental options, remains a deterrent for some to make the move. This move to small cities will not only have increased pressure on housing markets that are already tight, but also on physical infrastructure like roads, water, and sewer, as well as technological infrastructure like broadband. Any resident or business attraction strategy considered by a small town must consider the consequences on all aspects of their community.

  Working with a cross-section of municipal, community, business, and non-profit leaders to acknowledge newcomers, whether visitors or permanent residents, will go a long way to communicate that Ticonderoga is extending hospitality to all. How this hospitality is communicated could come in a variety of different ways – from physical or digital welcome guides (that to a degree are already circulating) to the frontline

staff at restaurants or cafés that are knowledgeable on when tours at the Fort run, or directions to the beach. Sending out this message in a cohesive manner will require a strong lead agency that can define Ticonderoga's value proposition.

TARGET ENTREPRENEURS AND BUSINESSES FOR TICONDEROGA

- **Local entrepreneurs** – Economic development should begin in Ticonderoga's back yard with local business owners and entrepreneurs who already have a stake in the community. Local entrepreneurism can be cultivated with a simultaneous and complementary effort focused on attracting businesses to the area, particularly regional businesses that have been successful and could benefit from a second or third location in another market. Regionally successful businesses already have brand recognition and a following that can promote the new location and would bring that to Ticonderoga. Beginning a targeted retail list of where and what these businesses are will help narrow down attraction efforts. Being prepared to reach out to these business owners with information on properties that are available in Ticonderoga, a preview of the consumer market, and the level of the Town's support will help show real potential for an actual location rather than just an idea.

  Aside from price and market access, entrepreneurs will be looking for:

  - Good broadband speeds,
  - Support networks/entrepreneurial ecosystems,
  - Concentration of existing startups, and/or
  - Gathering places outside of work (coffee shops, coworking etc.).

- **Established home-based businesses** – Entrepreneurs that are working at home may be ready to expand. Property owners have indicated a willingness to work with entrepreneurs on rent to lower the barrier to entry.
- **Retirees** – Seniors are not only a primary consumer target but a cohort that has great potential to be business owners themselves. With years of expertise in various other fields, retired individuals may have different motivations for getting into business than someone in their 20s or 30s. Leveraging the collective knowledge of these individuals to support community prosperity is a win-win.
- **New work-at-home professionals –** In a post-COVID-19 reality, some companies may make the decision to reduce the expectations that workers be in the office or eliminate a central office. While the working from home trend was bubbling up in office environments prior to COVID-19, these changes will have important consequences on where and when people work. The individuals who have the flexibility to move their job remotely likely fit within the mid-high-income category and could bring substantial spending power to Ticonderoga's existing businesses. Ticonderoga could capitalize on this trend as people start to make decisions based less on proximity to job centers and more on lifestyle, housing costs, and proximity to recreation. The availability of broadband is also critical for the work-from home demographic. People might assume that based on the town's location, internet connectivity is not desirable and therefore showcasing attainable speeds will be an important marketing tool.

CRITERIA TO CONSIDER IN DOWNTOWN REVITALIZATION

In order to remain responsive to the market and flexible to unconventional uses that may work in the target properties, along with other vacancies along Montcalm Street, it will be beneficial to establish a set of criteria in advance of when a potential use for buildings is proposed. Recommended criteria include, but are not limited to:

- Does the use encourage foot traffic along Montcalm Street?

- Is there an existing category of this type of business already located on Montcalm Street? If so, where?
- Does the store offer goods/services to visitors or residents, or both?
- Is the business owner experienced and do they have a business plan prepared?
- Does the business have a year-round business plan or is it seasonal?
- Does the business celebrate factors specific to Ticonderoga, and if yes, which ones?
- Does the business have another location/site and already have a loyal consumer following?
- Is the location contributing to retail density and closing a gap in storefront vacancies?
- Is there a defining feature that will make the entity a destination or a unique offering in the market?
- Will jobs be created?

Considering these answers collectively will help determine the overall impact a business will have on the corridor.

AGWAY BUILDING – 74 MONTCALM ST

Proposed reuse: Modern day general store

This property represents the eastern gateway into Montcalm Street. The redevelopment of this property is an opportunity to welcome people to the community and offer a first impression of the commercial corridor. As the oldest commercial structure in Ticonderoga, this property is a tangible piece of the town's past. Restoring the building while respecting its historical significance and authenticity is a nod to Ticonderoga's centuries old legacy.

The building has market potential to be transformed into a general store with a mix of products uniquely suited to the Town of Ticonderoga. A successful model of this type of modern general store is in Chestertown, NY, where the Crossroads Country Store offers a range of outdoor recreation apparel, equipment, hunting and fishing gear, as well as local beer, cheeses and other fresh and prepared goods sold at the deli. Crossroads bills itself as not just a store, but a destination in the Adirondacks. It is listed as the #2 activity to see and do in Chestertown on Trip Advisor.

The formula for what to include and stock in a general store is market dependent and can be adjusted to cater to Ticonderoga's history, highlight local producers, fluctuate with seasonal demand, and promote local expertise. The key to making this, or any type of retail, successful in Ticonderoga will be the ability to cater to local needs and provide unique goods and services that will draw visitors into town from the Fort. This could include toys and penny candy to attract visiting families as well as value-added food products and crafts made by local farmers and artisans. This will also include consideration for price points that match local buying power and are appealing to families. With access to the LaChute River Walk Trail and the Empire State Trail, the store could offer accessories and repair materials for bicycles, canoe and kayak rentals, as well as small snacks for on-the-go consumption. The Northville Five and Dime Store is an example of a general store type model that sits at the trailhead of a long-distance trail and capitalizes on that market to fuel a portion of its business as well as offering other everyday goods.

To maintain cash flow for the property owner and grow Montcalm's population base, the upper story of the property is suited to become up to 4 residential units.

Façade of Agway Building in Ticonderoga, NY

Façade of Crossroads Country Store in Chestertown, NY

Source: Crossroad Country Store Facebook

SEARS BUILDING – 85 MONTCALM

Proposed reuse: Blend of outdoor recreation and food/beverage

Located directly adjacent to the entrance of the LaChute River Walking Trail, future uses in the building can take advantage of its location between the concentration of workers at Ti-Works (soon to be opened), trail users, and others downtown for various services or retail. The town-owned, underutilized green space behind this property is an opportunity for a blend of food and beverage/entertainment/recreation. For summer months, the greenspace could be transformed into an outdoor dining park with active recreation like bocce ball or volleyball. While appropriate safety measures would need to be taken, other active recreation ideas include archery/axe throwing which has seen its popularity grow in recent years. In addition to the recreation portion, the interior of the building could function as a fast but fresh food restaurant with local offerings that appeal to the whole family. The idea would be to order inside or at a window counter and take a number outside to wait for your food. The recreation activities can all be designed to cater to families, whether by identifying certain hours that are family friendly, or mini offerings for the kids with an eye for safety that mirror the adult sized recreation.

The ability for people to come out not just for the food and beverage, but for something to do is key to communicating value-add to the consumer, which includes visitors who are likely looking for more than one thing and to occupy all members of the family. With the bowling alley no longer available for socializing and activity, this could be an opportunity to create another social atmosphere and meeting space, albeit in a very different setting. This space could also grow as a location for live music during the summer months. As a business model, the operator would need to decide if they are able to operate all year round or focus their revenue generation in the summer and shoulder season months. There are ways to transform this type of outdoor space into similar winter-themed activities with certain weatherization measures. The goal for this outdoor space is to be a signature spot on Montcalm Street; something that is differentiated from any other offerings but also does not overlap with what already exists.

Façade of Sears Building in Ticonderoga, NY

Example of greenspace usage behind 85 Montcalm

RATHBUN BUILDING – 110 MONTCALM ST

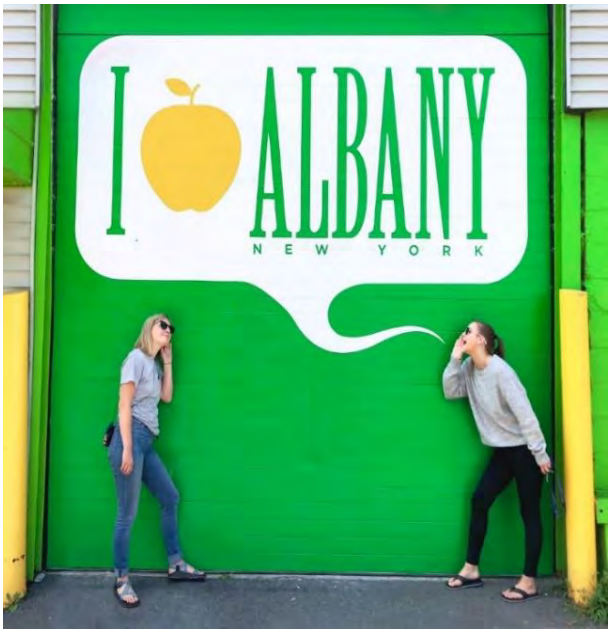
Proposed reuse: Restaurant with international cuisine

Just to the west of the Cobbler's Bench building, which is slated for redevelopment into a boutique hotel, 110 Montcalm Street has the potential to see a significant increase in foot traffic upon completion of the hotel project, which will enhance the market potential of certain uses. The side of the property that faces the parking lot that separates it from the Cobbler's Bench building is a blank canvas to add a pop of public art to the corridor. There are a variety of styles to showcase that could involve members across the community, from involving local schools by asking students what they would produce based on a certain prompt, to holding a community led design contest where multiple artists vie for the opportunity to reproduce their art on the side of the building. At the Nine Pine Cidery in Albany, New York's warehouse district, the brand turned a drab warehouse door into an ode to the City of Albany that riffs on the classic I Love New York marketing campaign. The mural attracts visitors to take pictures whether they are enjoying the tasting room or just picking up something from the warehouse. These pictures then end up on social media and become free advertising for the business and for the city.

Future use of the building can contribute to the overall business mix in the community while capitalizing on future patrons of the boutique hotel without being completely reliant on visitor spending. Right now, there is a gap in the market for fusion or additional international cuisine. The interior space is well suited to transition into a fast-casual type restaurant with kitchen space in the back, counter seating overlooking the street, and tables. This style of restaurant is in line with regional consumer spending patterns.

Rathbun Building

Nine Pin Cider Mural by Local Artist



Source: Nine Pin Cider

DOWNTOWN REVITALIZATION RECOMMENDATIONS

1. **Triage priorities based on internal capabilities and draw on community expertise.** While some circumstances have changed, much of the previous economic development and planning work remains relevant to support Ticonderoga's economy and businesses. The transition from planning to implementation is a barrier that prevents many communities from instigating progress. The change or processes can seem daunting and unattainable. With municipal leaders expected to do more with fewer resources, the pressure is immense to support the infrastructure of the community, in addition to creating a welcoming and vibrant atmosphere. Despite its relatively small population, the civic participation and community organizations with a downtown Ticonderoga focus demonstrate the willingness of residents to support the community. The catalyst to initiate change has a greater chance at success with the combined resources, expertise, and social capital of a combination of organizations, including but not limited to: Pride of Ticonderoga Inc., Montcalm Street Partnership, Ti-Alliance, and municipal staff. While pooling collective resources can support more impactful change, there still needs to be a clear understanding of the roles and responsibilities of each organization, and a definition of common goals to work.

2. **Designate community champions and grow entrepreneurs from within the region.** While attracting businesses into Ticonderoga is one portion of downtown revitalization, supporting community champions to promote a positive internal message and actively engage residents about the opportunities within Ticonderoga is another critical piece to support the community from within. Assigning community champions that post on social media, write op-eds in the newspaper, and/or attend high school basketball games or local festivals, will continue to bring awareness to the efforts underway by the Ticonderoga, add a level of transparency to revitalization efforts, and draw in others who want to be involved in the revitalization process. With the business of day-to-day life, people may want to get involved and not realize the efforts that are underway. Creating flexibility in how people can participate, based on their time, age, resources, or expertise will further expand the efforts across the entire community. Currently, there are businesses and organizations like the Ticonderoga Area Chamber of Commerce that promote existing business, specials, and events; the messaging around future opportunities is one that can be explored and promoted further.

Continue the positive momentum

Building on the momentum of recent business additions and positive stories from Ticonderoga is critical to showcasing future opportunity in town. Local and regional agencies can promote these stories to demonstrate that Ticonderoga has the resources, space, and business environment to welcome others. Recent wins in Ticonderoga include:

- Mont Calm Apothecary
- Elevate ADK Nutrition
- The Fox & Fern
- Ti-Works co-working space
- Rebuilding the golf course
- Plans for a boutique hotel at the Cobbler's Bench site

3. **Maintain a community and regional profile that demonstrates retail market characteristics.** The Town must have the appropriate information on hand (and online) to show businesses daytime traffic, demographic profiles, consumer tapestry segmentations, and other key community information that would help a business decide if the demand in the area merits a location. Based on the geography, defining the regional and local trade area, as well as the seasonal market, is important to demonstrate the full potential of the Ticonderoga market. There is an example of a "sell-sheet" from the Village of Holley, NY (population of 1,800) that demonstrates market potential and what physical assets exist to support business development (see last page). Customizing a one sheet document to use digitally and in person is ideal for showcasing Ticonderoga's most impactful properties.

4. **Host digital opening night for Ti-Works.** With Ti-Works on the brink of starting up prior to the COVID-19 crisis, a digital opening night, or information session, could help generate buzz surrounding the space while entrepreneurs and small businesses return to office spaces and more institutions open up around the region. This could be an opportune time to attract workers as companies downsize their physical footprint or completely close their offices with staff working successfully from their homes. Ti-Works could attract these workers, who may not want to work from home 100% of the time or need office resources like printing or meeting space.

5. **Host event for target properties.** While digital communication and social media are great ways to reach a large number of people with broad information, those that are serious about investing in redevelopment in Ticonderoga will want to get their feet on the ground and see the dynamics of Montcalm. For the key sites, inviting the real estate community, developers, and the investor community to see what properties are available is key to showcasing Ticonderoga's offerings. In addition to specific properties, a familiarization tour of this kind is also an opportunity to showcase the community's quality of life assets. Getting up close and personal will allow the Ti-Alliance and officials to hear directly from developers, understand what their specific concerns are about investment, and then respond directly to those issues. While these may be difficult conversations, the direct interaction with individuals cuts down on speculation, strengthens relationships, and increases Montcalm Street's exposure to the region.

6. **Promote Montcalm Street as its own identity and destination.** When someone searches "Ticonderoga" on Google, the first hit that comes up is Fort Ticonderoga's website, followed by top sights in Ticonderoga which include, the Fort, Star Trek Original Series Set Tour, Mount Defiance and the Hancock House. What is not included is Montcalm Street's commercial corridor. While this corridor is not just one easily definable location, it is a collective of local businesses that showcase goods, services, and products unique to the area. The external perception and reputation of Montcalm's commercial corridor needs to grow an identity all its own to be considered a destination like those featured at the top of Google's search page. This distinct identity is especially important as Ticonderoga sits geographically between two of the most recognized locations in the Adirondacks, Lake Placid and Lake George. The differentiating factors from each of these locations can be framed as a benefit to visitors looking to venture somewhere slightly off the usual Adirondack hotspots. Using existing programs or enhancing training for business owners through existing merchant groups to improve their visibility on Google and other travel sites will help boost the town's profile.

7. **Support improvements to the public realm.** Part of preparing and supporting a business-friendly community is the physical appearance of the public realm and streetscape. This includes elements like sidewalks, banners, crosswalks, accessibility, flower beds, lighting, and more. Generally, this means all the things that go into signaling that a place is safe, inviting, and walkable.

8. **Increase engagement and partnership with the Fort**. The capital campaign soon to be underway at Fort Ticonderoga is an opportunity to bring awareness to surrounding community assets.

9. **Adjust direct business support to be responsive to changing COVID-19 circumstances.** The business environment continues to undergo significant shifts as COVID-19 ripples across the country with varying intensity. The needs for businesses could fluctuate between needing working capital to workforce training

to rebuilding inventory to personal protective equipment. Integrating flexibility into any funds that are available for direct business assistance will help businesses make the difficult decisions they need to make to keep things operational.

Funding Sources

The following funding sources are alternatives or additions to the funding streams typically offered through the Consolidated Funding Application, which has been a helpful tool for downtown revitalization. As of the writing of these recommendations, some sources are offering COVID-19 relief funds for businesses or municipalities and have various rotating forms of capital to support economic development. Setting up alerts for each organization will help alert Ti-Alliance and their partners to potential funding opportunities.

- Adirondack Foundation
- Entergy Micro grants
- Harry and Jeanette Weinberg Foundation Small grants
- John May Farm Safety Fund
- Local Initiatives Support Corporation (LISC)
- National Grid
- Northern Border Regional Commission
- Novartis COVID-19 Community Response Fund
- NYS Broadband office
- Rural Digital Opportunity Fund
- USDA ReConnect
- USDA Rural Community Development Initiative

More at: https://www.ruralhealthinfo.org/funding

DEMOGRAPHIC AND SOCIOECONOMIC PROFILE

This section examines demographic and socioeconomic trends within Ticonderoga and the surrounding region to build an understanding of market demand and market potential. These trends help to identify opportunities in downtown Ticonderoga related to retail, restaurants, tourism, and other business categories.

POPULATIONS AND HOUSEHOLDS

As of 2019, the Town of Ticonderoga has a population of nearly 4,900 among 2,000 households. Population and the number of households have been steadily declining since 2010 in the town and Essex County. During that same period there was marginal growth in the North Country and New York. Looking forward to 2024, the town, county and North Country are projected to decline slightly in terms of population and households.

Population, 2010 - 2024

	2010	2019	2024	Annual Growth Rate 2010 - 2019	Annual Growth Rate 2019 - 2024
Town of Ticonderoga	5,042	4,889	4,739	(0.3%)	(0.3%)
Essex County	39,370	38,108	37,070	(0.4%)	(0.3%)
North Country	433,193	438,606	432,761	0.1%	(0.1%)
New York	19,378,102	20,030,453	20,245,169	0.4%	0.1%

Source: Esri

Households, 2010 - 2024

	2010	2019	2024	Annual Growth Rate 2010 - 2019	Annual Growth Rate 2019 - 2024
Town of Ticonderoga	2,097	2,047	1,987	(0.3%)	(0.3%)
Essex County	16,262	16,000	15,567	(0.2%)	(0.3%)
North Country	164,730	165,976	163,405	0.1%	(0.2%)
New York	7,317,755	7,541,262	7,611,733	0.3%	0.1%

Source: Esri

MIGRATION

The Census provides information on the movement of people from one location of residence to another. According to the 2018 five-year survey, between 2013 and 2018 approximately 8.2% of the population moved to the Town of Ticonderoga. The majority of new Ticonderoga residents come from other areas within Essex County. Approximately 22.1% of people moving within Essex County are 25 to 34 years old.

Geographic Mobility Characteristics for Town of Ticonderoga, 2018

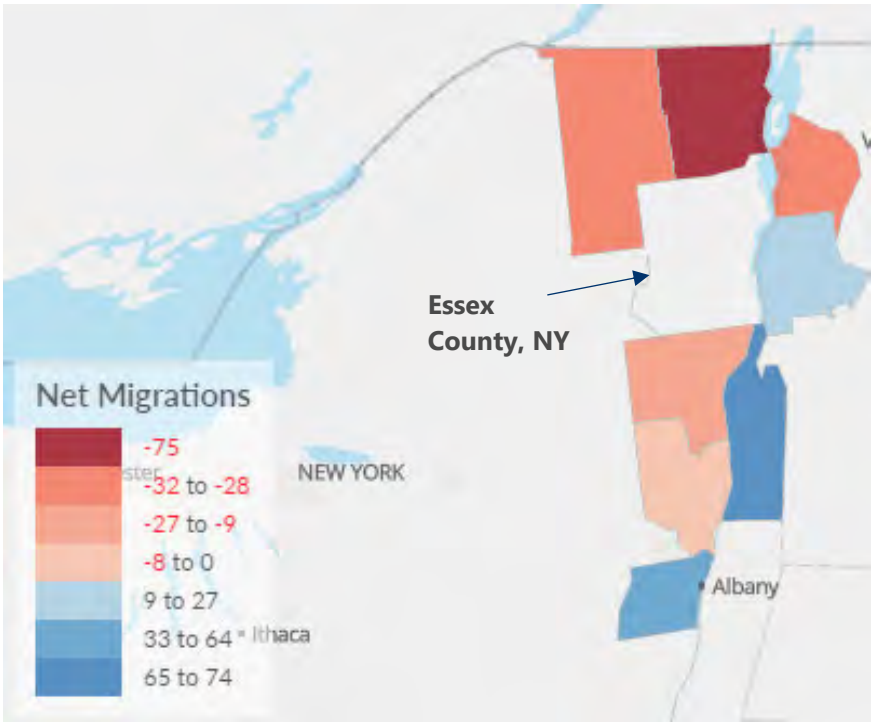
	Total Population	Moved, within Essex County	Moved, from different county in New York State	Moved, From different state	Moved, From abroad
1 to 4 years	266	8.3%	0.0%	0.0%	0.0%
5 to 17 years	628	2.5%	5.1%	0.0%	0.0%
18 to 24 years	530	4.9%	3.4%	2.6%	0.0%
25 to 34 years	452	22.1%	0.0%	0.0%	0.0%
35 to 44 years	478	0.0%	3.6%	0.8%	0.0%
45 to 54 years	717	2.4%	0.6%	0.0%	2.5%
55 to 64 years	666	3.5%	0.0%	0.0%	0.0%
65 to 74 years	650	7.5%	0.0%	0.0%	2.5%
75 years and over	443	4.3%	0.0%	0.0%	0.0%
Total	4,830	5.6%	1.5%	0.4%	0.7%
Median age (years)	45.7	29.0	23.2	-	-

Source: U.S. Census 2018 American Community Census 5-year Estimates

According to census data, individuals moving to Ticonderoga from other places within Essex County have a median income of approximately $22,000. Individuals moving to the Town of Ticonderoga are more than three times as likely to rent than own homes.

Migration data for Essex County, indicates that more people are leaving the county than moving into the county with a net migration of -41. In total, Essex County receives new residents from Washington County, NY; Albany County, NY; and Addison County, VT. Essex County residents are migrating to the New York counties of Saratoga, Warren, Franklin, and Clinton and Chittenden County, VT.

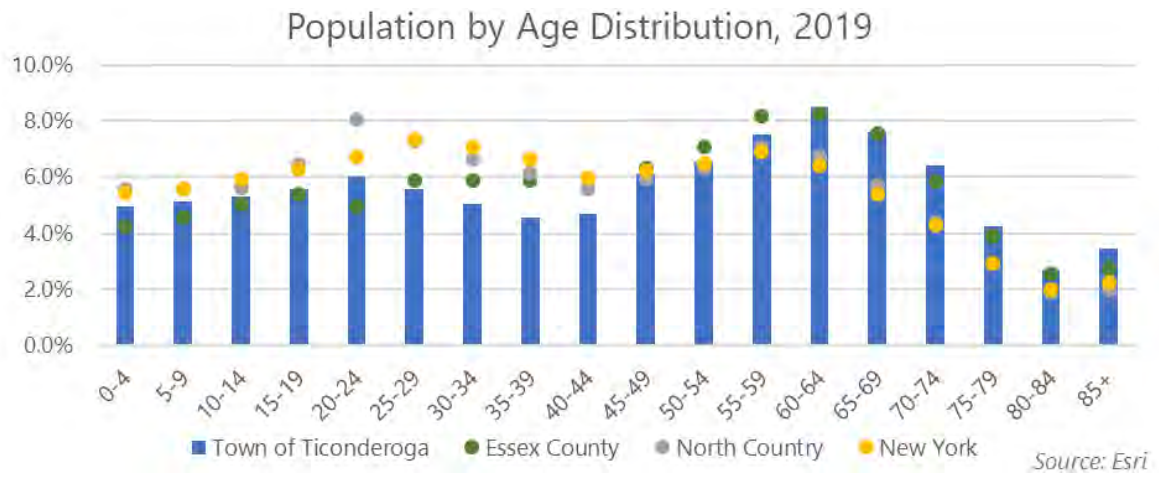
Essex County Net Migration, 2018



Source: EMSI

AGE

The residents of the Town of Ticonderoga and Essex County are considerably older than the population of North Country and New York State. The town and county have similar median ages of approximately 47 years old, while the median age in the North Country and the state approximately 39 years. Ticonderoga's age distribution differs from its comparison geographies in having a relatively lower proportion of individuals in the age groups between 30-44 years old.

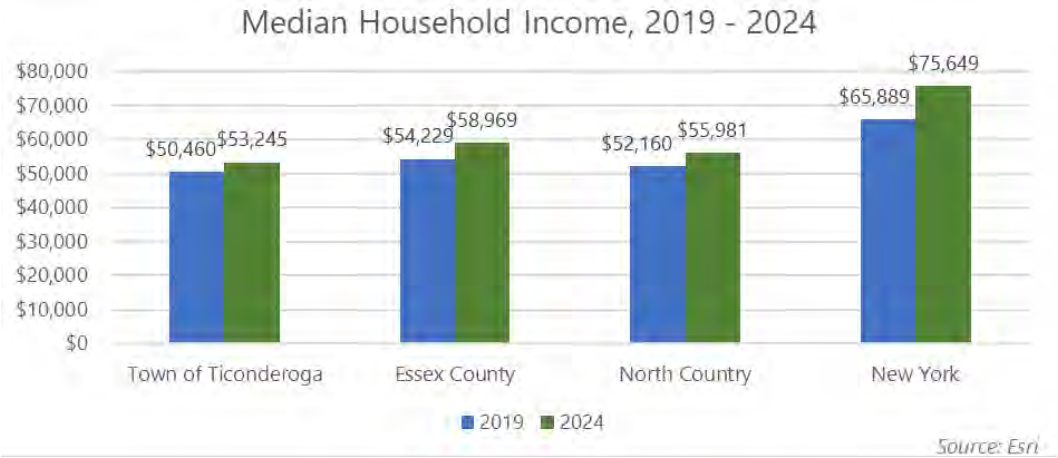


Median Age, 2010 - 2024					
	2010	2019	2024	Annual Growth Rate 2010 - 2019	Annual Growth Rate 2019 - 2024
Town of Ticonderoga	44.7	47.6	48.3	0.7%	0.2%
Essex County	44.4	47.0	48.0	0.7%	0.2%
North Country	37.6	38.9	39.9	0.4%	0.3%
New York	37.9	39.2	40.2	0.4%	0.3%

Source: Esri

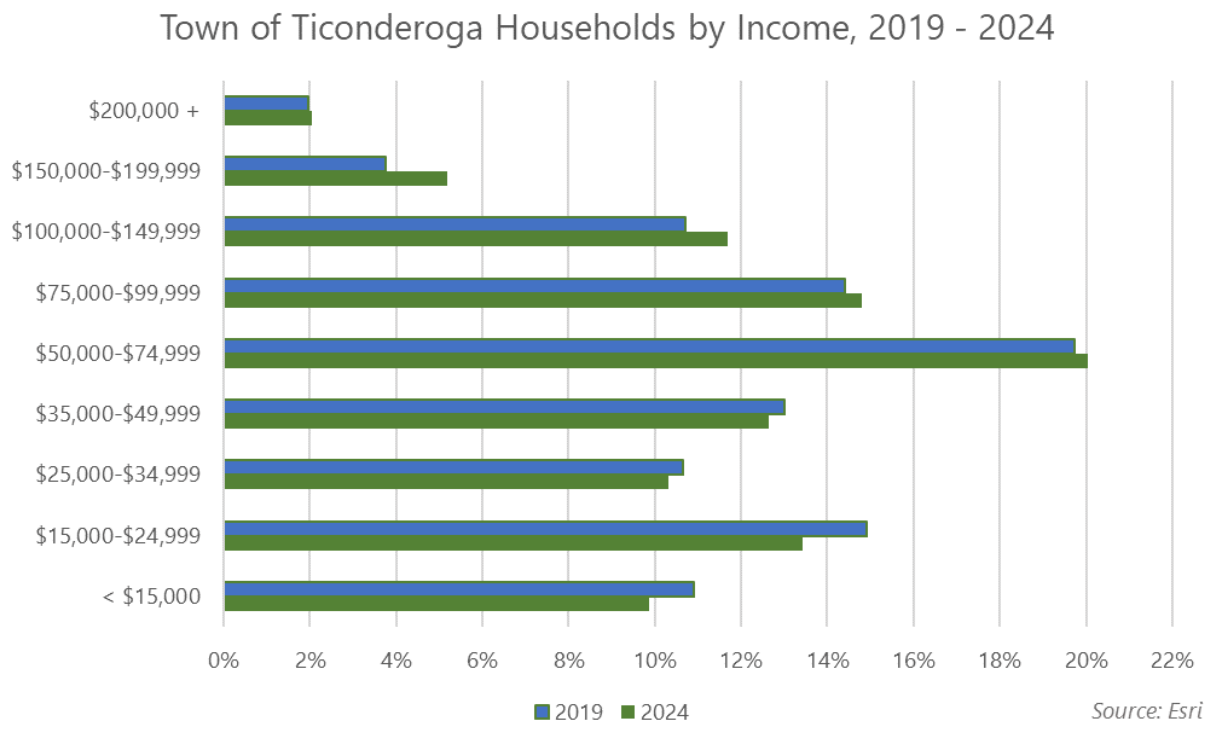
INCOME

Incomes in the Town of Ticonderoga are considerably lower than the county, North Country, and state. As of 2019, the median household income in the town was approximately $50,500 compared to the median household income in Essex County of $54,200. Ticonderoga and the surrounding region also have a lower proportion of households in the upper income categories higher than $100,000 compared to the state. However, income levels in the Town of Ticonderoga, Essex County, North Country, and New York are projected to rise. Furthermore, it is important to note that these income figures do not factor in second homeowner incomes. Ticonderoga and the North Country region experience an influx of wealthy second homeowners during the summer season who spend money at local businesses.



Households by Income, 2019				
	Town of Ticonderoga	Essex County	North Country	New York
< $15,000	11%	9%	12%	12%
$15,000-$24,999	15%	10%	10%	9%
$25,000-$34,999	11%	11%	10%	8%
$35,000-$49,999	13%	15%	15%	11%
$50,000-$74,999	20%	20%	20%	16%
$75,000-$99,999	14%	15%	14%	12%
$100,000-$149,999	11%	14%	12%	15%
$150,000-$199,999	4%	4%	4%	8%
$200,000 +	2%	2%	3%	10%

Source: Esri



RACE AND ETHNICITY

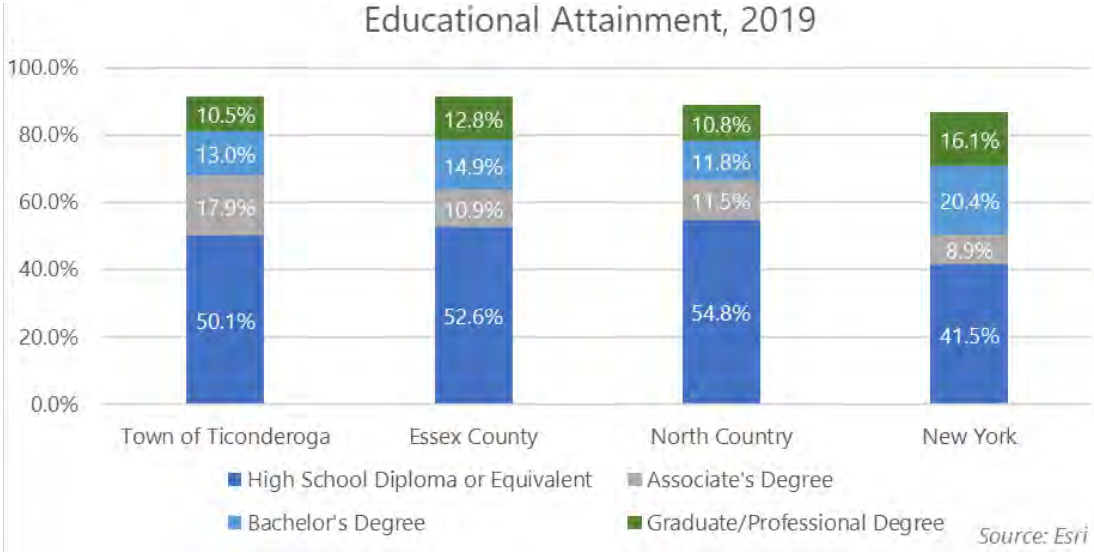
Esri's diversity index measures racial and ethnic diversity in a geography on a scale from 0 to 100, with 100 being the most diverse. Ticonderoga is predominately white with lower diversity compared to the county, North Country, and state.

Population by Race and Ethnicity, 2019				
	Town of Ticonderoga	Essex County	North Country	New York
White	95.8%	92.4%	89.1%	62.5%
Black/African American	0.6%	3.2%	4.7%	16.0%
American Indian/Alaska Native	0.6%	0.5%	1.4%	0.6%
Asian	1.1%	0.8%	1.2%	9.0%
Pacific Islander	0.0%	0.0%	0.1%	0.1%
Other Race	0.4%	1.3%	1.2%	8.3%
Two or More Races	1.5%	1.7%	2.2%	3.6%
Diversity Index	11.4	20.8	27.2	71.0

Source: Esri

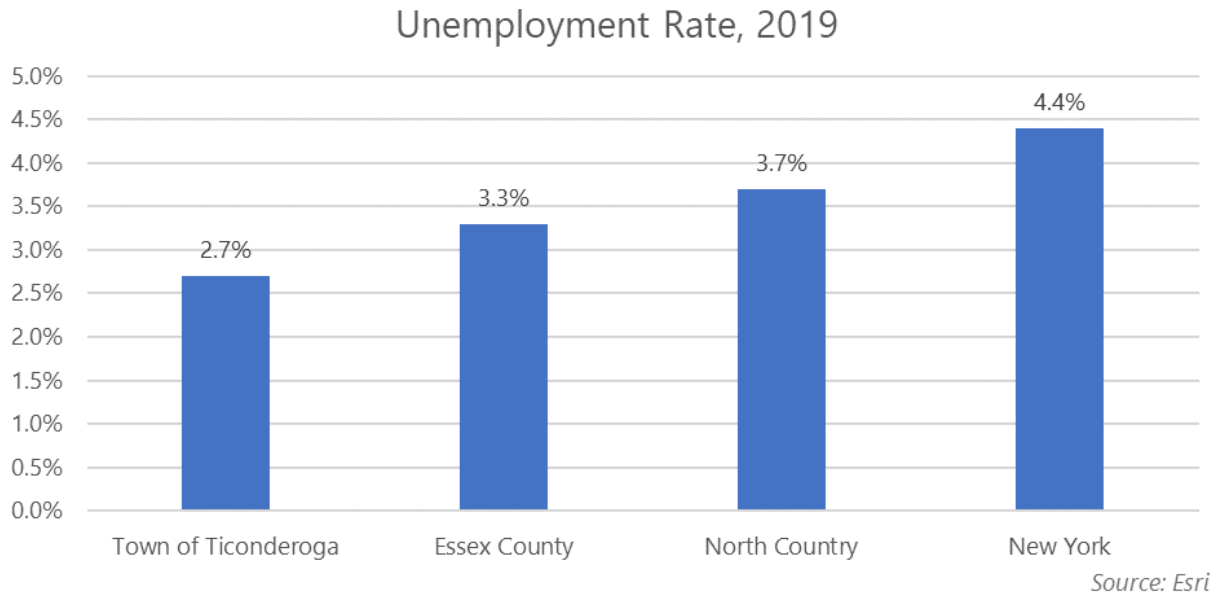
EDUCATIONAL ATTAINMENT

Ticonderoga has slightly lower education attainment levels compared to the county, region, and state in terms of Bachelor's and graduate/professional degrees but outpaces these geographies in Associate's degrees. The figure below displays the highest level of education completed by each geography's 25+ population.



UNEMPLOYMENT

As of 2019 the unemployment rate for Ticonderoga was 2.7%, the lowest of the benchmark geographies. [3]



[3] Note that these figures reflect data prior to COVID-19.

ECONOMIC BASE ANALYSIS

The economic base analysis provides an overview of the job market in Ticonderoga and region to provide a foundation for the economic health, workforce characteristics, and opportunities for job growth in downtown Ticonderoga. This information is used in conjunction with the retail market analysis to consider options other than traditional retail for storefronts on Montcalm.

ECONOMIC DATA AND TRENDS

As of 2019, there are approximately 3,400 jobs in Ticonderoga. The largest industries by employment are Government[4], Manufacturing, and Health Care and Social Assistance. Between 2014 and 2019, jobs in Ticonderoga declined by 5%, while the county and North Country experienced slight contractions of less than 1%. The Manufacturing industry drove the job loss in Ticonderoga, as it shed 100 jobs between 2014 and 2019 and is projected to continue shedding jobs into 2024.

Industry concentration is indicated by location quotient (LQ)[5] with Manufacturing (LQ 2.47), Agriculture, Forestry, Fishing and Hunting (LQ 1.77), and Retail Trade (LQ 1.54) being the most concentrated within Ticonderoga and more concentrated than in the U.S. as a whole.

Ticonderoga (12883) Jobs by Industry, 2014 - 2024

NAICS	Description	2014 Jobs	2019 Jobs	2024 Jobs	2014 - 2019 Change	2014 - 2019 % Change	2019 - 2024 Change	2019 - 2024 % Change	Location Quotient	Avg. Earnings Per Job
11	Agriculture, Forestry, Fishing and Hunting	67	70	74	3	4%	4	6%	1.77	$35,762
21	Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0	0%	0	0%	-	$0
22	Utilities	<10	10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	0.89	$178,412
23	Construction	204	139	135	(65)	(32%)	(4)	(3%)	0.72	$60,461
31	Manufacturing	760	660	592	(100)	(13%)	(68)	(10%)	2.47	$98,759
42	Wholesale Trade	50	80	96	30	60%	16	20%	0.65	$41,691
44	Retail Trade	501	515	516	14	3%	1	0%	1.54	$34,139
48	Transportation and Warehousing	27	27	25	0	0%	(2)	(7%)	0.21	$35,529
51	Information	16	17	20	1	6%	3	18%	0.28	$66,345
52	Finance and Insurance	65	57	58	(8)	(12%)	1	2%	0.42	$78,031
53	Real Estate and Rental and Leasing	13	11	<10	(2)	(15%)	Insf. Data	Insf. Data	0.20	$43,783
54	Professional, Scientific, and Technical Services	26	21	19	(5)	(19%)	(2)	(10%)	0.10	$55,506
55	Management of Companies and Enterprises	0	0	0	0	0%	0	0%	-	$0
56	Administrative and Support and Waste Management and Remediation Services	39	56	66	17	44%	10	18%	0.27	$38,416
61	Educational Services	28	28	28	0	0%	0	0%	0.32	$44,563
62	Health Care and Social Assistance	674	593	539	(81)	(12%)	(54)	(9%)	1.38	$54,037
71	Arts, Entertainment, and Recreation	60	77	89	17	28%	12	16%	1.30	$29,200
72	Accommodation and Food Services	178	196	215	18	10%	19	10%	0.67	$27,077
81	Other Services (except Public Administration)	100	78	76	(22)	(22%)	(2)	(3%)	0.49	$27,415
90	Government	744	739	736	(5)	(1%)	(3)	(0%)	1.46	$79,199
99	Unclassified Industry	<10	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	1.85	Insf. Data
Total		3,568	3,379	3,309	(189)	(5%)	(70)	(2%)		$62,380

Source: EMSI

[4] Government includes federal, state, and locally operated medical centers, schools, US postal service, and military.

[5] Location quotient (LQ) is a measure of industry concentration, indicating how concentrated a certain sector is in a given area of study, relative to the nation. It can reveal what makes a particular region "unique" in comparison with the national average. A location quotient greater than 1 indicates that sector employment in the study area is more concentrated than it is at the national level.

Industry trends in Ticonderoga were compared to trends in Essex County and the North Country Region to identify specific strengths that the local and regional economies can draw from. Overall, the economies in the county and North Country have a stronger tourism presence, indicated by significant employment in the Retail Trade and Accommodation and Food Service industries. These industries typically have lower than average earnings per job and thus a high concentration of jobs in these industries leads to overall lower average earnings for the county and North Country. As of 2019, earnings per job are higher in Ticonderoga at $62,400 compared to $54,400 in Essex County, and $57,600 in the North Country. Overall, jobs in Ticonderoga are relatively high paying but a significant portion of these jobs are held by people who live outside of the town, leading to a lower median household income for the town.

Essex County Jobs by Industry, 2014 - 2024

NAICS	Description	2014 Jobs	2019 Jobs	2024 Jobs	2014 - 2019 Change	2014 - 2019 % Change	2019 - 2024 Change	2019 - 2024 % Change	Location Quotient	Avg. Earnings Per Job
11	Agriculture, Forestry, Fishing and Hunting	236	247	261	11	5%	14	6%	1.31	$35,587
21	Mining, Quarrying, and Oil and Gas Extraction	133	88	72	(45)	(34%)	(16)	(18%)	1.29	$82,892
22	Utilities	26	24	22	(2)	(8%)	(2)	(8%)	0.44	$166,483
23	Construction	995	869	823	(126)	(13%)	(46)	(5%)	0.94	$48,743
31	Manufacturing	937	933	919	(4)	(0%)	(14)	(2%)	0.73	$85,818
42	Wholesale Trade	231	343	403	112	48%	60	17%	0.58	$40,604
44	Retail Trade	1,822	1,831	1,797	9	0%	(34)	(2%)	1.14	$35,044
48	Transportation and Warehousing	143	148	151	5	3%	3	2%	0.24	$50,901
51	Information	181	196	218	15	8%	22	11%	0.67	$50,654
52	Finance and Insurance	225	289	350	64	28%	61	21%	0.45	$78,557
53	Real Estate and Rental and Leasing	122	159	169	37	30%	10	6%	0.58	$42,254
54	Professional, Scientific, and Technical Services	387	305	294	(82)	(21%)	(11)	(4%)	0.28	$70,091
55	Management of Companies and Enterprises	147	56	33	(91)	(62%)	(23)	(41%)	0.24	$54,616
56	Administrative and Support and Waste Management and Remediation Services	237	264	296	27	11%	32	12%	0.26	$32,914
61	Educational Services	408	435	474	27	7%	39	9%	1.04	$53,429
62	Health Care and Social Assistance	2,101	1,978	1,973	(123)	(6%)	(5)	(0%)	0.96	$51,280
71	Arts, Entertainment, and Recreation	494	536	553	42	9%	17	3%	1.89	$35,822
72	Accommodation and Food Services	2,463	2,459	2,476	(4)	(0%)	17	1%	1.76	$31,376
81	Other Services (except Public Administration)	631	716	767	85	13%	51	7%	0.94	$35,047
90	Government	4,355	4,305	4,293	(50)	(1%)	(12)	(0%)	1.78	$77,697
99	Unclassified Industry	22	20	21	(2)	(9%)	1	5%	1.38	$27,538
Total		16,297	16,200	16,365	(97)	(1%)	165	1%		$54,431

Source: EMSI

North Country Jobs by Industry, 2014 - 2024										
NAICS	Description	2014 Jobs	2019 Jobs	2024 Jobs	2014 - 2019 Change	2014 - 2019 % Change	2019 - 2024 Change	2019 - 2024 % Change	Location Quotient	Avg. Earnings Per Job
11	Agriculture, Forestry, Fishing and Hunting	4,553	4,598	4,771	45	1%	173	4%	2.18	$45,403
21	Mining, Quarrying, and Oil and Gas Extraction	252	278	287	26	10%	9	3%	0.36	$72,200
22	Utilities	592	568	534	(24)	(4%)	(34)	(6%)	0.93	$149,460
23	Construction	7,108	7,713	7,947	605	9%	234	3%	0.75	$60,774
31	Manufacturing	10,949	10,598	10,554	(351)	(3%)	(44)	(0%)	0.74	$70,413
42	Wholesale Trade	2,965	2,729	2,727	(236)	(8%)	(2)	(0%)	0.41	$58,027
44	Retail Trade	22,412	20,912	20,192	(1,500)	(7%)	(720)	(3%)	1.17	$34,775
48	Transportation and Warehousing	3,565	3,727	3,871	162	5%	144	4%	0.55	$51,378
51	Information	1,893	1,783	1,777	(110)	(6%)	(6)	(0%)	0.54	$52,301
52	Finance and Insurance	2,487	2,674	2,729	187	8%	55	2%	0.37	$64,011
53	Real Estate and Rental and Leasing	1,684	1,737	1,792	53	3%	55	3%	0.56	$41,110
54	Professional, Scientific, and Technical Services	3,489	3,656	3,926	167	5%	270	7%	0.30	$59,850
55	Management of Companies and Enterprises	1,092	1,118	1,143	26	2%	25	2%	0.43	$71,817
56	Administrative and Support and Waste Management and Remediation Services	4,194	4,251	4,455	57	1%	204	5%	0.38	$38,656
61	Educational Services	5,173	5,584	6,061	411	8%	477	9%	1.20	$40,513
62	Health Care and Social Assistance	23,562	25,195	26,756	1,633	7%	1,561	6%	1.09	$59,957
71	Arts, Entertainment, and Recreation	2,148	2,212	2,293	64	3%	81	4%	0.70	$31,368
72	Accommodation and Food Services	14,680	14,512	14,632	(168)	(1%)	120	1%	0.93	$23,646
81	Other Services (except Public Administration)	6,242	6,230	6,308	(12)	(0%)	78	1%	0.73	$28,367
90	Government	62,503	61,263	61,948	(1,240)	(2%)	685	1%	2.26	$77,036
99	Unclassified Industry	187	136	116	(51)	(27%)	(20)	(15%)	0.85	$40,347
Total		181,730	181,473	184,819	(257)	(0%)	3,346	2%		$57,617

Source: EMSI

The table below displays industries by 2019 Gross Regional Product (GRP) for Ticonderoga (12833) compared to Essex County and the North Country. Manufacturing is the largest industry by GRP in Ticonderoga, constituting nearly 44% of the total GRP compared to 14% in Essex County and 10% in the North Country. Nationally, the manufacturing industry has experienced job decline as the industry continues to adopt automation. Concern over automation was identified in the 2006 Comprehensive Plan for Ticonderoga. Specifically, the plan highlighted that automation reduced the number of employees at the International Paper Mill and as a result the population of Ticonderoga declined. Government is the second largest industry by GRP in the Ticonderoga and the largest for the county and region. Health Care and Social Assistance and Retail Trade are also strong contributors to Ticonderoga's GRP.

Gross Regional Product, 2019					
NAICS	Description	Ticonderoga (12883)		Essex County	North Country
31	Manufacturing	$177,548,793	43.9%	14.0%	10.3%
90	Government	$71,651,739	17.7%	26.8%	41.0%
62	Health Care and Social Assistance	$40,109,016	9.9%	8.0%	10.0%
44	Retail Trade	$33,266,630	8.2%	8.5%	7.9%
23	Construction	$12,705,067	3.1%	4.4%	3.8%
52	Finance and Insurance	$12,328,461	3.0%	4.1%	2.8%
22	Utilities	$11,735,187	2.9%	1.6%	2.3%
72	Accommodation and Food Services	$9,839,564	2.4%	10.8%	3.6%
42	Wholesale Trade	$6,843,231	1.7%	2.0%	2.7%
11	Agriculture, Forestry, Fishing and Hunting	$5,797,170	1.4%	1.3%	2.2%
51	Information	$4,406,603	1.1%	2.5%	1.7%
81	Other Services (except Public Administration)	$4,120,550	1.0%	2.4%	1.5%
56	Administrative and Support and Waste Management and Remediation Services	$3,681,644	0.9%	1.0%	1.4%
71	Arts, Entertainment, and Recreation	$3,603,585	0.9%	2.1%	0.7%
54	Professional, Scientific, and Technical Services	$2,056,055	0.5%	2.8%	2.1%
53	Real Estate and Rental and Leasing	$1,962,350	0.5%	2.3%	1.6%
48	Transportation and Warehousing	$1,732,364	0.4%	0.9%	1.4%
61	Educational Services	$1,305,078	0.3%	1.6%	1.6%
21	Mining, Quarrying, and Oil and Gas Extraction	$0	0.0%	2.5%	0.9%
55	Management of Companies and Enterprises	$0	0.0%	0.2%	0.5%
Total		$404,693,089	100.0%	100.0%	100.0%

Source: EMSI

Industry trends at the 4-digit NAICS code provide greater detail into which sub-sectors are driving growth within Ticonderoga. Pulp, Paper, and Paperboard Mills is the top 4-digit industry with 627 jobs in 2019 and an extremely high location quotient of 317.67. This industry is led by Ticonderoga's International Paper and the industry as a whole has historically shed jobs and is projected to continue declining. The Health Care and Social Assistance industry within Ticonderoga is driven by Nursing Care Facilities and General Medical and Surgical Hospitals. Overall ten of the top 25 industries have declined or remained stagnant since 2014.

Ticonderoga (12883) Top 25 4-Digit Industries by 2019 Jobs, 2014 - 2024										
NAICS	Description	2014 Jobs	2019 Jobs	2024 Jobs	2014 - 2019 Change	2014 - 2019 % Change	2019 - 2024 Change	2019 - 2024 % Change	Location Quotient	Avg. Earnings Per Job
3221	Pulp, Paper, and Paperboard Mills	701	627	564	(74)	(11%)	(63)	(10%)	317.67	$99,008
9029	State Government, Excluding Education and Hospitals	250	250	261	0	0%	11	4%	5.39	$90,132
6231	Nursing Care Facilities (Skilled Nursing Facilities)	364	244	155	(120)	(33%)	(89)	(36%)	7.45	$48,348
4523	General Merchandise Stores, including Warehouse Clubs and Supercenters	218	233	241	15	7%	8	3%	5.81	$31,794
9036	Education and Hospitals (Local Government)	219	225	223	6	3%	(2)	(1%)	1.27	$78,607
9039	Local Government, Excluding Education and Hospitals	196	192	188	(4)	(2%)	(4)	(2%)	1.63	$60,701
7225	Restaurants and Other Eating Places	125	141	159	16	13%	18	13%	0.63	$23,529
6221	General Medical and Surgical Hospitals	101	114	128	13	13%	14	12%	1.18	$82,053
9011	Federal Government, Civilian	79	65	53	(14)	(18%)	(12)	(18%)	1.09	$94,137
6214	Outpatient Care Centers	60	64	72	4	7%	8	13%	3.11	$60,152
4451	Grocery Stores	71	60	50	(11)	(15%)	(10)	(17%)	1.08	$30,616
4244	Grocery and Related Product Merchant Wholesalers	26	52	64	26	100%	12	23%	3.15	$38,332
4413	Automotive Parts, Accessories, and Tire Stores	47	52	55	5	11%	3	6%	4.40	$34,423
2373	Highway, Street, and Bridge Construction	80	51	37	(29)	(36%)	(14)	(27%)	7.00	$80,473
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	55	49	50	(6)	(11%)	1	2%	3.66	$40,944
7211	Traveler Accommodation	51	48	46	(3)	(6%)	(2)	(4%)	1.18	$37,222
7121	Museums, Historical Sites, and Similar Institutions	34	46	53	12	35%	7	15%	12.83	$28,991
5221	Depository Credit Intermediation	58	43	39	(15)	(26%)	(4)	(9%)	1.19	$72,908
6216	Home Health Care Services	<10	34	44	Insf. Data	Insf. Data	10	29%	1.06	$27,649
2389	Other Specialty Trade Contractors	23	34	36	11	48%	2	6%	1.52	$56,957
7139	Other Amusement and Recreation Industries	25	31	35	6	24%	4	13%	1.01	$29,513
4441	Building Material and Supplies Dealers	26	30	28	4	15%	(2)	(7%)	1.26	$44,120
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	26	29	32	3	12%	3	10%	1.49	$46,706
4411	Automobile Dealers	28	28	28	0	0%	0	0%	1.04	$49,610
5617	Services to Buildings and Dwellings	24	28	30	4	17%	2	7%	0.47	$29,239

Source: EMSI

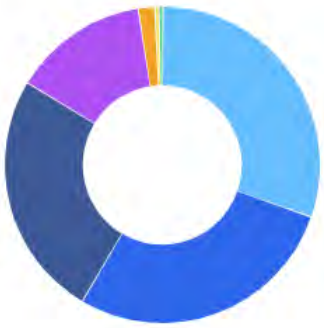
Industries with the highest concentration in Ticonderoga represent unique assets and include industries within Manufacturing, Forestry, Healthcare, Construction, and Government. Pulp, Paper, and Paperboard Mills is the most concentrated with an LQ of 317.67. As this industry experiences decline it will have incremental impacts on the town's economy.

Ticonderoga (12883) Top 4-Digit Industries by Location Quotient, 2014 - 2024										
NAICS	Description	2014 Jobs	2019 Jobs	2024 Jobs	2014 - 2019 Change	2014 - 2019 % Change	2019 - 2024 Change	2019 - 2024 % Change	2019 Location Quotient	Avg. Earnings Per Job
3221	Pulp, Paper, and Paperboard Mills	701	627	564	(74)	(11%)	(63)	(10%)	317.67	$99,008
1132	Forest Nurseries and Gathering of Forest Products	<10	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	49.14	Insf. Data
1133	Logging	30	20	18	(10)	(33%)	(2)	(10%)	13.44	$34,951
7121	Museums, Historical Sites, and Similar Institutions	34	46	53	12	35%	7	15%	12.83	$28,991
6231	Nursing Care Facilities (Skilled Nursing Facilities)	364	244	155	(120)	(33%)	(89)	(36%)	7.45	$48,348
2373	Highway, Street, and Bridge Construction	80	51	37	(29)	(36%)	(14)	(27%)	7.00	$80,473
1131	Timber Tract Operations	<10	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	6.69	Insf. Data
5629	Remediation and Other Waste Management Services	<10	22	31	Insf. Data	Insf. Data	9	41%	6.53	$41,814
4523	General Merchandise Stores, including Warehouse Clubs and Supercenters	218	233	241	15	7%	8	3%	5.81	$31,794
9029	State Government, Excluding Education and Hospitals	250	250	261	0	0%	11	4%	5.39	$90,132

Source: EMSI

The majority of Ticonderoga businesses are small employers with fewer than 20 employees. More than 30% of businesses fall within the 1 to 4 employee category.

Ticonderoga Businesses by Number of Employees, 2019



	Percentage	Business Count
1 to 4 employees	30.3%	72
5 to 9 employees	28.2%	67
10 to 19 employees	25.2%	60
20 to 49 employees	13.9%	33
50 to 99 employees	1.7%	4
100 to 249 employees	0.4%	1
250 to 499 employees	0.4%	1

Source: DatabaseUSA, EMSI

WORKFORCE

The top twenty-five occupations in Ticonderoga are displayed below. The automation index (AI)[6] is displayed for these occupations to indicate which occupations are at high risk for automation. Additionally, the table below displays the number of Ticonderoga jobs filled by residents and by commuters (those outside of Ticonderoga). The top occupation is Paper Goods Machine Setter, Operators, and Tenders with 183 jobs as of 2019, of which 104 are fulfilled by commuters. Additionally, this position has an automation index of 119.8, indicating that it is at high risk for automation. The majority of top occupations complement a mix of industries spanning Manufacturing, Retail, and Health Care and Social Services, Education, and Construction. Of the 25 top occupations 12 have an automation index above 100, indicating they are at risk of replacement by automation.

Ticonderoga (12883) Top 25 Occupations by 2019 Jobs, 2014 - 2024

SOC	Description	2014 Jobs	2019 Jobs	2024 Jobs	2014 - 2019 Change	2014 - 2019 % Change	2019 - 2024 Change	2019 - 2024 % Change	Automation Index	Resident Workers	Net Commuters	Median Annual Earnings
51-9196	Paper Goods Machine Setters, Operators, and Tenders	160	183	164	23	14%	(19)	(10%)	119.8	79	104	$49,704
41-2031	Retail Salespersons	110	110	112	0	0%	2	2%	93.4	80	30	$26,990
41-2011	Cashiers	100	109	109	9	9%	0	0%	105.5	70	39	$24,136
31-1014	Nursing Assistants	146	103	75	(43)	(29%)	(28)	(27%)	97.0	54	49	$29,787
33-3012	Correctional Officers and Jailers	88	87	87	(1)	(1%)	0	0%	90.5	78	9	$58,219
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	66	76	88	10	15%	12	16%	131.4	59	17	$25,805
39-9021	Personal Care Aides	55	72	75	17	31%	3	4%	94.2	71	1	$29,712
43-5081	Stock Clerks and Order Fillers	66	71	72	5	8%	1	1%	112.3	37	34	$24,920
29-1141	Registered Nurses	71	71	71	0	0%	0	0%	85.3	50	21	$65,890
29-2061	Licensed Practical and Licensed Vocational Nurses	76	58	43	(18)	(24%)	(15)	(26%)	84.8	31	27	$40,413
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	65	56	55	(9)	(14%)	(1)	(2%)	122.5	50	6	$30,440
49-9071	Maintenance and Repair Workers, General	54	54	51	0	0%	(3)	(6%)	109.6	40	14	$42,885
49-9041	Industrial Machinery Mechanics	46	48	44	2	4%	(4)	(8%)	109.8	22	26	$46,077
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	41	47	48	6	15%	1	2%	117.2	30	17	$33,460
25-9041	Teacher Assistants	39	43	43	4	10%	0	0%	89.7	45	(2)	$26,751
43-9061	Office Clerks, General	41	41	41	0	0%	0	0%	102.0	41	0	$30,868
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and	43	40	39	(3)	(7%)	(1)	(3%)	91.4	42	(2)	$36,736
35-3031	Waiters and Waitresses	36	37	38	1	3%	1	3%	129.8	37	0	$26,848
47-2061	Construction Laborers	46	36	34	(10)	(22%)	(2)	(6%)	131.9	23	13	$36,289
41-1011	First-Line Supervisors of Retail Sales Workers	35	34	34	(1)	(3%)	0	0%	87.8	24	10	$42,250
25-2021	Elementary School Teachers, Except Special Education	32	34	34	2	6%	0	0%	82.3	33	1	$67,043
11-1021	General and Operations Managers	32	33	34	1	3%	1	3%	82.2	28	5	$84,147
43-3031	Bookkeeping, Accounting, and Auditing Clerks	36	32	31	(4)	(11%)	(1)	(3%)	103.6	28	4	$39,027
43-4051	Customer Service Representatives	26	31	32	5	19%	1	3%	96.4	26	5	$31,428
25-2031	Secondary School Teachers, Except Special and Career/Technical Education	29	31	32	2	7%	1	3%	84.9	30	1	$70,568

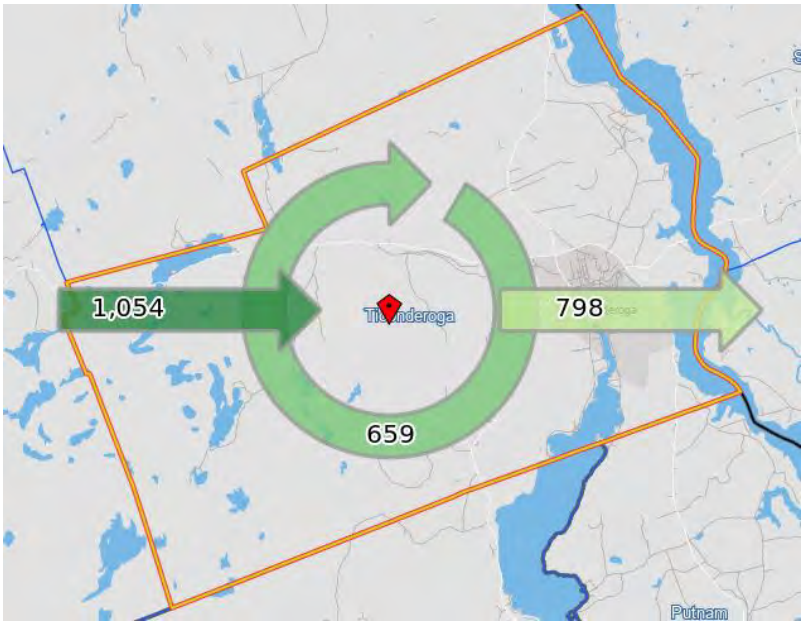
Source: EMSI

[6] The automation index captures an occupation's risk of being affected by automation relative to other occupations with 100 being an average worker, values over 100 being at risk for automation, and values under 100 having a low automation risk. The automation index measures an occupation's time spent on high risk work and low risk work, number of high risk jobs in compatible occupations, and overall industry automation risk.

COMMUTER TRENDS

As of 2017, approximately 1,050 people commute into the Town of Ticonderoga for work. Approximately 660 Ticonderoga residents both live and work within the town and nearly 800 residents commute out of Ticonderoga for work.

Town of Ticonderoga Inflow/Flow, 2017



Source: U.S. Census Bureau, OnTheMap

Where Ticonderoga's Workforce Lives | The majority of Ticonderoga's workforce lives within Essex County with 39% residing in Ticonderoga, 12% in Moriah, and 12% in Crown Point. Approximately 51% of Ticonderoga's workers travel fewer than 10 miles from their home to work at Ticonderoga businesses and 19% travel more than 50 miles from areas including Queensbury, NY and Plattsburgh, NY.

Where Ticonderoga's Residents Work | Approximately 45% of the Town of Ticonderoga's residents work within the town, with an additional 6% working in Moriah, and 3% in Queensbury. In terms of distance traveled, 48% of Ticonderoga residents travel fewer than 10 miles to work while 20% work more than 50 miles from the town in places including Plattsburgh, NY and Williston, VT.

Where Town of Ticonderoga Workers Live, 2017		
	Number	Percent
Ticonderoga town (Essex, NY)	659	38.5%
Moriah town (Essex, NY)	206	12.0%
Crown Point town (Essex, NY)	200	11.7%
Schroon town (Essex, NY)	29	1.7%
Dresden town (Washington, NY)	27	1.6%
Queensbury town (Warren, NY)	24	1.4%
Putnam town (Washington, NY)	21	1.2%
Granville town (Washington, NY)	14	0.8%
Plattsburgh city (Clinton, NY)	13	0.8%
Glens Falls city (Warren, NY)	13	0.8%
All Other Locations	507	29.6%
Total	1,713	100.0%

Source: U.S. Census Bureau, OnTheMap

Where Town of Ticonderoga Residents Work, 2017		
	Number	Percent
Ticonderoga town (Essex, NY)	659	45.2%
Moriah town (Essex, NY)	93	6.4%
Queensbury town (Warren, NY)	48	3.3%
Glens Falls city (Warren, NY)	37	2.5%
Middlebury town (Addison, VT)	32	2.2%
Vergennes city (Addison, VT)	32	2.2%
Hague town (Warren, NY)	26	1.8%
Williston town (Chittenden, VT)	23	1.6%
Crown Point town (Essex, NY)	22	1.5%
Plattsburgh city (Clinton, NY)	21	1.4%
All Other Locations	464	31.8%
Total	1,457	100.0%

Source: U.S. Census Bureau, OnTheMap

TICONDEROGA WORKFORCE CHARACTERISTICS

According to the Census Bureau, approximately 47% of Ticonderoga's workforce (both Ticonderoga workers and in-commuters) make less than $40,000 a year. In terms of age, the majority of workers fall between 30 and 54 years old.

Ticonderoga Workforce Earnings, 2017		
Monthly Earnings	Yearly Earnings	Percentage of Workers
$1,250 or less	$15,000 or less	15.1%
$1,251 to $3,333	$15,001 to $39,995	32.2%
More than $3,333	More than $39,996	52.7%

Source: U.S. Census Bureau, OnTheMap

Ticonderoga Workforce by Age, 2017	
Age	Percentage of Workers
29 or younger	20.8%
30 to 54	52.4%
55 or older	26.8%

Source: U.S. Census Bureau, OnTheMap

NET COMMUTERS BY OCCUPATIONS

The table below displays Ticonderoga's net commuters by occupation as a measure of jobs within Ticonderoga compared to residents within each occupation. The top imported occupations fall within the manufacturing, service, and health care realms. The highest new commuter occupation is Paper Goods Machine Setters, Operators, and Tenders with high median annual earnings of nearly $50,000.

Top Occupations Where Ticonderoga Imports Workers, 2019									
SOC	Description	2014 Jobs	2019 Jobs	2014 - 2019 Change	2014 - 2019 % Change	Automation Index	Resident Workers	Net Commuters	Median Annual Earnings
51-9196	Paper Goods Machine Setters, Operators, and Tenders	160	183	23	14%	119.8	79	104	$49,704
31-1014	Nursing Assistants	146	103	(43)	(29%)	97.0	54	49	$29,787
41-2011	Cashiers	100	109	9	9%	105.5	70	39	$24,136
43-5081	Stock Clerks and Order Fillers	66	71	5	8%	112.3	37	34	$24,920
41-2031	Retail Salespersons	110	110	0	0%	93.4	80	30	$26,990
29-2061	Licensed Practical and Licensed Vocational Nurses	76	58	(18)	(24%)	84.8	31	27	$40,413
49-9041	Industrial Machinery Mechanics	46	48	2	4%	109.8	22	26	$46,077
29-1141	Registered Nurses	71	71	0	0%	85.3	50	21	$65,890
35-3021	Combined Food Preparation and Serving Workers, Including Fast Food	66	76	10	15%	131.4	59	17	$25,805
53-7062	Laborers and Freight, Stock, and Material Movers, Hand	41	47	6	15%	117.2	30	17	$33,460

Source: EMSI

EXPORTED WORKERS

The table below displays the occupations where Ticonderoga exports workers, meaning Ticonderoga residents are leaving the town to work in other communities. These occupations are a mix of education, childcare, administrative and other professionals. The professionals that commute out of Ticonderoga have low median annual earnings within the $20,000s and $30,000s with the exception of Police and Sheriff's Patrol Officers. Overall, Ticonderoga sees a greater influx of occupations than it exports signaling that Ticonderoga is a regional employment hub yet many people are choosing not to reside in the town.

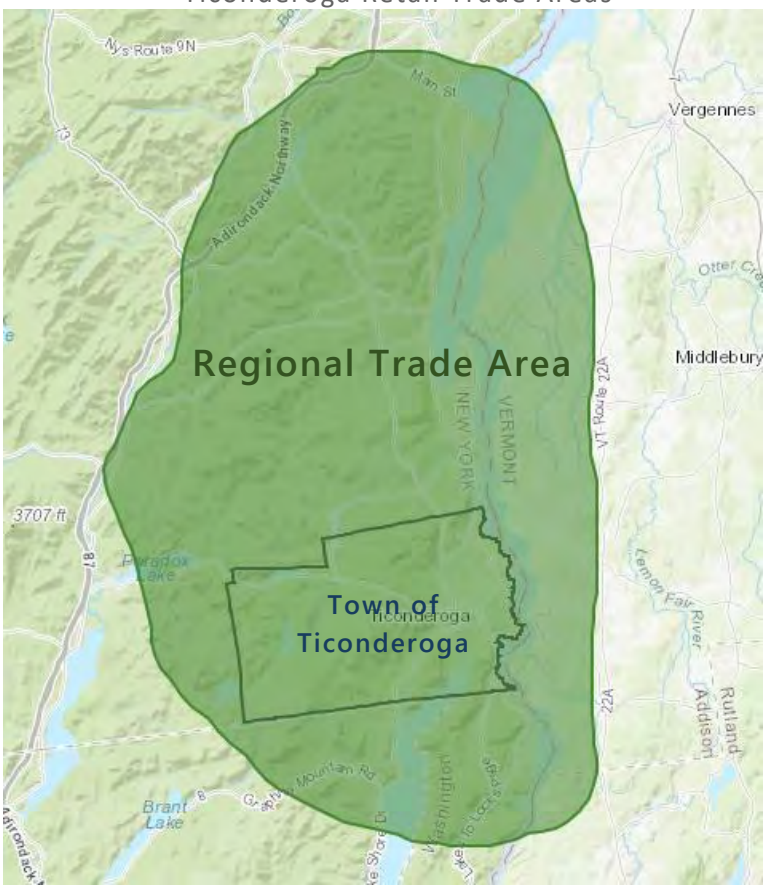
Top Occupations Where Ticonderoga Exports Workers, 2019									
SOC	Description	2014 Jobs	2019 Jobs	2014 - 2019 Change	2014 - 2019 % Change	Automation Index	Resident Workers	Net Commuters	Median Annual Earnings
25-9041	Teacher Assistants	39	43	4	10%	89.7	45	(2)	$26,751
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	43	40	(3)	(7%)	91.4	42	(2)	$36,736
43-4171	Receptionists and Information Clerks	17	15	(2)	(12%)	94.2	17	(2)	$35,007
39-9011	Childcare Workers	15	13	(2)	(13%)	88.0	15	(2)	$25,847
33-3051	Police and Sheriff's Patrol Officers	16	16	0	0%	94.5	17	(1)	$58,569

Source: EMSI

RETAIL MARKET ANALYSIS

The following market analysis examines the local and regional retail market demand for Ticonderoga. The Downtown Trade Area and Regional Trade Areas depict the geographic extent within which Ticonderoga generates most of its customers, as displayed in the map below.

Ticonderoga Retail Trade Areas



Source: Esri

- **The Downtown Trade Area** is the trade area for retail establishments that serve day-to-day needs of customers that offer convenience type products (supermarkets, gas stations, coffee shops, etc.). The Downtown Trade Area encompasses the local area around Montcalm Street from Route 9N to Champlain Avenue. This is a walkable area of downtown that is roughly a 11-minute walk from end to end. The population of the Downtown Trade Area is slightly more affluent than the population of the Town of Ticonderoga with a higher median household income of $52,716 and a younger demographic with a median age of 42.1.
- **The Regional Trade Area** applies to businesses that sell 'destination' products and services. For example, Ticonderoga's Walmart is a regional destination that draws in visitors from Putnam and Hague, north to Westport and east to Vermont along Lake Champlain. The population of the Regional Trade area is slightly more affluent than the Town of Ticonderoga (median household income of $54,868) and of a similar age makeup (median age 47.3). The Regional Trade Area includes the towns of Ticonderoga, Moriah, and Crown Point and portions of Addison, VT; Benson, VT; Bridgeport, VT; Elizabeth, NY; Hague, NY; North Hudson, NY; Orwell, VT, Panton, VT; Putnam, NY; Schroon, NY; Shoreham, VT; and Westport, NY.

The figures on the following pages shows the retail supply and demand by residents within the Downtown Trade Area and Regional Trade Area. Retail categories with sales leakage are in green, and those with sales surplus are in red. Within the trade areas, there is a mix of retail sectors showing leakage, indicating a possible opportunity to open or expand new businesses. A sales surplus might exist for several reasons. The geography might be a popular

shopping destination for tourists and other out-of-town visitors, or a cluster of competing businesses offering a similar product/service may be located within the trade area. Alternatively, a sales surplus could be an indication of market saturation.

Downtown Trade Area Retail Gap					
NAICS	Description	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Number of Businesses
441	Motor Vehicle & Parts Dealers	$ 789,078	$ 1,740,759	($951,681)	1
4411	Automobile Dealers	$ 667,276	$ -	$667,276	0
4412	Other Motor Vehicle Dealers	$ 60,371	$ -	$60,371	0
4413	Auto Parts, Accessories & Tire Stores	$ 61,431	$ -	$61,431	0
442	Furniture & Home Furnishings Stores	$ 133,094	$ 503,563	($370,469)	2
4421	Furniture Stores	$ 68,702	$ 390,949	($322,247)	1
4422	Home Furnishings Stores	$ 64,392	$ 112,615	($48,223)	1
443	Electronics & Appliance Stores	$ 136,312	$ -	$136,312	0
444	Bldg Materials, Garden Equip. & Supply Stores	$ 233,835	$ -	$233,835	0
4441	Bldg Material & Supplies Dealers	$ 213,509	$ -	$213,509	0
4442	Lawn & Garden Equip & Supply Stores	$ 20,326	$ -	$20,326	0
445	Food & Beverage Stores	$ 658,298	$ 1,209,262	($550,964)	2
4451	Grocery Stores	$ 562,857	$ -	$562,857	0
4452	Specialty Food Stores	$ 43,666	$ 336,023	($292,357)	1
4453	Beer, Wine & Liquor Stores	$ 51,776	$ 563,057	($511,281)	1
446,4461	Health & Personal Care Stores	$ 329,218	$ 117,695	$211,523	1
447,4471	Gasoline Stations	$ 387,844	$ 716,024	($328,180)	1
448	Clothing & Clothing Accessories Stores	$ 290,991	$ 340,754	($49,763)	1
4481	Clothing Stores	$ 207,271	$ 116,225	$91,046	1
4482	Shoe Stores	$ 33,736	$ -	$33,736	0
4483	Jewelry, Luggage & Leather Goods Stores	$ 49,984	$ 224,530	($174,546)	1
451	Sporting Goods, Hobby, Book & Music Stores	$ 105,310	$ -	$105,310	0
4511	Sporting Goods/Hobby/Musical Instr Stores	$ 88,298	$ -	$88,298	0
4512	Book, Periodical & Music Stores	$ 17,012	$ -	$17,012	0
452	General Merchandise Stores	$ 440,846	$ -	$440,846	0
4521	Department Stores Excluding Leased Depts.	$ 269,926	$ -	$269,926	0
4529	Other General Merchandise Stores	$ 170,920	$ -	$170,920	0
453	Miscellaneous Store Retailers	$ 143,839	$ -	$143,839	0
4531	Florists	$ 12,491	$ -	$12,491	0
4532	Office Supplies, Stationery & Gift Stores	$ 42,809	$ -	$42,809	0
4533	Used Merchandise Stores	$ 17,290	$ -	$17,290	0
4539	Other Miscellaneous Store Retailers	$ 71,248	$ -	$71,248	0
454	Nonstore Retailers	$ 113,111	$ 993,478	($880,367)	1
4541	Electronic Shopping & Mail-Order Houses	$ 94,340	$ -	$94,340	0
4542	Vending Machine Operators	$ 1,973	$ -	$1,973	0
4543	Direct Selling Establishments	$ 16,798	$ 993,478	($976,680)	1
722	Food Services & Drinking Places	$ 393,520	$ 593,080	($199,560)	4
7223	Special Food Services	$ 17,366	$ -	$17,366	0
7224	Drinking Places - Alcoholic Beverages	$ 22,684	$ -	$22,684	0
7225	Restaurants/Other Eating Places	$ 353,470	$ 574,893	($221,423)	3

Source: Esri

Regional Trade Area Retail Gap					
NAICS	Description	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Number of Businesses
441	Motor Vehicle & Parts Dealers	$ 50,219,874	$ 46,796,745	$3,423,129	17
4411	Automobile Dealers	$ 42,412,541	$ 26,754,690	$15,657,851	5
4412	Other Motor Vehicle Dealers	$ 4,154,761	$ 18,276,509	($14,121,748)	8
4413	Auto Parts, Accessories & Tire Stores	$ 3,652,572	$ 1,765,546	$1,887,026	3
442	Furniture & Home Furnishings Stores	$ 7,262,754	$ 1,074,116	$6,188,638	4
4421	Furniture Stores	$ 3,753,444	$ 730,457	$3,022,987	2
4422	Home Furnishings Stores	$ 3,509,311	$ 343,659	$3,165,652	2
443	Electronics & Appliance Stores	$ 7,552,018	$ 747,321	$6,804,697	1
444	Bldg Materials, Garden Equip. & Supply Stores	$ 15,243,219	$ 8,703,606	$6,539,613	14
4441	Bldg Material & Supplies Dealers	$ 13,757,245	$ 7,802,934	$5,954,311	12
4442	Lawn & Garden Equip & Supply Stores	$ 1,485,975	$ 900,673	$585,302	2
445	Food & Beverage Stores	$ 38,332,297	$ 13,258,903	$25,073,394	17
4451	Grocery Stores	$ 33,186,796	$ 10,674,951	$22,511,845	10
4452	Specialty Food Stores	$ 2,509,219	$ 1,157,826	$1,351,393	5
4453	Beer, Wine & Liquor Stores	$ 2,636,282	$ 1,426,127	$1,210,155	2
446,4461	Health & Personal Care Stores	$ 19,323,669	$ 5,694,023	$13,629,646	7
447,4471	Gasoline Stations	$ 25,012,862	$ 24,137,803	$875,059	10
448	Clothing & Clothing Accessories Stores	$ 14,934,770	$ 1,825,297	$13,109,473	6
4481	Clothing Stores	$ 10,812,049	$ 1,396,998	$9,415,051	5
4482	Shoe Stores	$ 1,728,282	$ -	$1,728,282	0
4483	Jewelry, Luggage & Leather Goods Stores	$ 2,394,439	$ 428,300	$1,966,139	1
451	Sporting Goods, Hobby, Book & Music Stores	$ 7,612,428	$ 864,924	$6,747,504	4
4511	Sporting Goods/Hobby/Musical Instr Stores	$ 6,690,114	$ 738,042	$5,952,072	4
4512	Book, Periodical & Music Stores	$ 922,314	$ 126,882	$795,432	1
452	General Merchandise Stores	$ 24,420,867	$ 30,286,638	($5,865,771)	5
4521	Department Stores Excluding Leased Depts.	$ 14,778,281	$ 27,423,000	($12,644,719)	1
4529	Other General Merchandise Stores	$ 9,642,585	$ 2,863,638	$6,778,947	4
453	Miscellaneous Store Retailers	$ 8,780,906	$ 2,161,896	$6,619,010	13
4531	Florists	$ 659,775	$ 249,084	$410,691	2
4532	Office Supplies, Stationery & Gift Stores	$ 2,367,297	$ 373,296	$1,994,001	3
4533	Used Merchandise Stores	$ 881,718	$ 672,283	$209,435	4
4539	Other Miscellaneous Store Retailers	$ 4,872,116	$ 867,232	$4,004,884	3
454	Nonstore Retailers	$ 7,533,533	$ 10,102,010	($2,568,477)	4
4541	Electronic Shopping & Mail-Order Houses	$ 6,088,410	$ 2,411,784	$3,676,626	1
4542	Vending Machine Operators	$ 125,956	$ -	$125,956	0
4543	Direct Selling Establishments	$ 1,319,167	$ 7,690,226	($6,371,059)	3
722	Food Services & Drinking Places	$ 21,030,315	$ 12,393,668	$8,636,647	42
7223	Special Food Services	$ 919,062	$ -	$919,062	0
7224	Drinking Places - Alcoholic Beverages	$ 1,010,525	$ 280,608	$729,917	2
7225	Restaurants/Other Eating Places	$ 19,100,728	$ 12,113,060	$6,987,668	40

Source: Esri

There are 40 businesses within the Downtown Trade Area and the retail categories with the largest sales leakage are Automobile Dealers, Grocery Stores, and Department Stores. In the Regional Trade Area, the categories with the largest sales leakage are Grocery Stores, Clothing Stores, and Restaurants/Other Eating Places. Retail categories with large sales leakage do not necessarily indicate that a new business or expansion of an existing business will be

successful within a region. The figures below compare the retail spending gap in the Downtown Trade Area and Regional Trade Area to average sales of similar businesses in New York State. This allows us to identify which of the industries with sales leakage in each of the trade areas may have enough unmet demand to support opening a new store or expanding existing stores. Supportable business figures in each respective trade area are determined assuming: (1) 25% of the sales leakage is recaptured (this is typical among various retail categories), and (2) New businesses have sales comparable to the average sales of all New York State businesses in the same retail category.

There is not enough unmet demand to support an entire store in any retail category within the Downtown Trade Area. However, there are a variety of categories with unmet demand to support small footprints. Creating multiple small footprint retail offerings where retail categories could share space could prove successful in this market.

Downtown Trade Area Supportable Retail							
A	B	C	D	E	F	G	H
NAICS	Description	Retail Gap	25% Leakage Recapture	Average Sales Per Business	Supportable Businesses (D / E)	Average Sales per SF	Supportable SF (D/G)
4451	Grocery Stores	$ 562,857	$ 140,714	$3,816,887	0.04	$ 500	281
4441	Bldg Material & Supplies Dealers	$ 213,509	$ 53,377	$2,101,730	0.03	$ 350	153
4461	Health & Personal Care Stores	$ 211,523	$ 52,881	$2,402,154	0.02	$ 400	132
4511	Sporting Goods & Hobby Stores	$ 88,298	$ 22,075	$1,351,793	0.02	$ 250	88
4413	Auto Parts, Accessories & Tire Stores	$ 61,431	$ 15,358	$ 943,686	0.02	$ 300	51
4539	Other Miscellaneous Store Retailers	$ 71,248	$ 17,812	$1,140,143	0.02	$ 300	59
4431	Electronics & Appliance Stores	$ 136,312	$ 34,078	$2,194,137	0.02	$ 500	68
4481	Clothing Stores	$ 91,046	$ 22,762	$1,572,375	0.01	$ 300	76
4529	Other General Merchandise Stores	$ 170,920	$ 42,730	$3,154,944	0.01	$ 500	85
4532	Office Supplies, Stationery & Gift Stores	$ 42,809	$ 10,702	$ 792,645	0.01	$ 300	36
4533	Used Merchandise Stores	$ 17,290	$ 4,323	$ 323,314	0.01	$ 200	22
7224	Drinking Places - Alcoholic Beverages	$ 22,684	$ 5,671	$ 530,855	0.01	$ 250	23
4531	Florists	$ 12,491	$ 3,123	$ 403,384	0.01	$ 200	16
4521	Department Stores	$ 269,926	$ 67,482	$9,565,011	0.01	$ 250	270
4442	Lawn & Garden Equip & Supply Stores	$ 20,326	$ 5,082	$ 819,251	0.01	$ 250	20
4482	Shoe Stores	$ 33,736	$ 8,434	$1,438,752	0.01	$ 300	28

Source: Camoin 310, Esri

Within the Regional Trade Area there are multiple retail categories that can support additional businesses including Restaurants/Other Eating Place, Clothing Stores, Grocery Stores, Health & Personal Care Stores, and Sporting & Hobby Stores. Retail categories that support Ticonderoga residents and residents within the region have the greatest probability of success in downtown Ticonderoga. Based on the analysis above, Health & Personal Care Stores, Sporting Goods & Hobby Stores, and Other Miscellaneous Store Retailers show the strongest demand both locally and regionally. Creating a unique retail offering/experience will help to create a regional destination to draw residents from around the region to downtown Ticonderoga.

Regional Trade Area Supportable Retail							
A	B	C	D	E	F	G	H
NAICS	Description	Retail Gap	25% Leakage Recapture	Average Sales Per Business	Supportable Businesses (D / E)	Average Sales per SF	Supportable SF (D/G)
7225	Restaurants/Other Eating Places	$ 6,987,668	$1,746,917	$ 589,323	2.96	$ 350	4,991
4481	Clothing Stores	$ 9,415,051	$2,353,763	$1,572,375	1.50	$ 300	7,846
4451	Grocery Stores	$ 22,511,845	$5,627,961	$3,816,887	1.47	$ 500	11,256
4461	Health & Personal Care Stores	$ 13,629,646	$3,407,412	$2,402,154	1.42	$ 400	8,519
4511	Sporting Goods & Hobby Stores	$ 5,952,072	$1,488,018	$1,351,793	1.10	$ 250	5,952
4539	Other Miscellaneous Store Retailers	$ 4,004,884	$1,001,221	$1,140,143	0.88	$ 300	3,337
4431	Electronics & Appliance Stores	$ 6,804,697	$1,701,174	$2,194,137	0.78	$ 500	3,402
4441	Bldg Material & Supplies Dealers	$ 5,954,311	$1,488,578	$2,101,730	0.71	$ 350	4,253
4532	Office Supplies, Stationery & Gift Stores	$ 1,994,001	$ 498,500	$ 792,645	0.63	$ 300	1,662
4422	Home Furnishings Stores	$ 3,165,652	$ 791,413	$1,266,603	0.62	$ 300	2,638
4529	Other General Merchandise Stores	$ 6,778,947	$1,694,737	$3,154,944	0.54	$ 500	3,389
4413	Auto Parts, Accessories & Tire Stores	$ 1,887,026	$ 471,757	$ 943,686	0.50	$ 300	1,573
4452	Specialty Food Stores	$ 1,351,393	$ 337,848	$ 720,576	0.47	$ 350	965
4421	Furniture Stores	$ 3,022,987	$ 755,747	$1,906,735	0.40	$ 300	2,519
7224	Drinking Places - Alcoholic Beverages	$ 729,917	$ 182,479	$ 530,855	0.34	$ 250	730
4482	Shoe Stores	$ 1,728,282	$ 432,071	$1,438,752	0.30	$ 300	1,440
4483	Jewelry, Luggage & Leather Goods Stores	$ 1,966,139	$ 491,535	$1,790,514	0.27	$ 500	983
4531	Florists	$ 410,691	$ 102,673	$ 403,384	0.25	$ 200	513
4453	Beer, Wine & Liquor Stores	$ 1,210,155	$ 302,539	$1,204,840	0.25	$ 350	864
4442	Lawn & Garden Equip & Supply Stores	$ 585,302	$ 146,326	$ 819,251	0.18	$ 250	585
4512	Book, Periodical & Music Stores	$ 795,432	$ 198,858	$1,123,119	0.18	$ 250	795
4533	Used Merchandise Stores	$ 209,435	$ 52,359	$ 323,314	0.16	$ 200	262

Source: Camoin 310, Esri

MARKET SEGMENTS

To understand the consumers within the local and regional markets we examine market segments. Market segmentation is used by retail site selectors to examine the characteristics of an area such as demographic, socioeconomic, housing and lifestyle characteristics when considering many site locations. Businesses utilize market segmentation to understand their customers' lifestyle choices, purchasing preferences, and how they spend their free time. Market segmentation data for the Downtown Trade Area and Regional Trade Area were obtained from Esri's Tapestry Segmentation model. Additional information about this Esri model can be found here: http://www.esri.com/landing-pages/tapestry.

Overall, regional consumers spend modestly and prefer convenience and practicality over trends. Consumers have strong community ties and often volunteer for community causes. Consumers in Downtown Ticonderoga have similar consumer characteristics with a focus on environmental concerns. Detailed descriptions of each segment follow.

Regional Trade Area Market Segments		
	Tapestry	Percent of Households
1	Heartland Communities	25.1%
2	Rural Resort Dwellers	16.1%
3	Midlife Constants	14.9%
4	The Great Outdoors	13.3%
5	Rooted Rural	12.0%
Other Segments		18.6%
Total		100.0%

Source: Esri

Downtown Trade Area Market Segments		
	Tapestry	Percent of Households
1	Midlife Constants	59.7%
2	Old and Newcomers	40.3%
Total		100.0%

Source: Esri

HEARTLAND COMMUNITIES

Average Household Size: 2.39 people

Median Age: 42.3 years

Median Household Income: $42,400

Well settled and close-knit, Heartland Communities 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, prefer to buy American, and favor domestic driving vacations over foreign plane trips. Consumer preferences include:

- Traditional and prefer to bank and pay their bills in person.
- Residents often partake in public activities.
- Home remodeling is not a top priority; however, residents tackle necessary maintenance on their homes including mowing their lawns.
- For vehicles, residents often drive domestic trucks or SUVS.
- Budget-conscious consumers stick to what they know and highly value American made products.

RURAL RESORT DWELLERS

Average Household Size: 2.22 people

Median Age: 54.1 years

Median Household Income: $50,400

Although the Great Recession forced many owners of second homes to sell, Rural Resort Dwellers residents remain an active market, just a bit smaller. These communities are centered in resort areas, many in the Midwest, where the change in seasons supports a variety of outdoor activities. Retirement looms for many of these blue collar, older householders, but workers are postponing retirement or returning to work to maintain their current lifestyles. Workers are traveling further to maintain employment. They are passionate about their hobbies, like freshwater fishing and hunting, but otherwise have very simple tastes. Consumer preferences include:

- Simple tastes and prefer modest clothing.
- Often stick to brands they know and pay little attention to advertising.
- In their free time, residents work on their vehicles and vegetable gardens.
- Television reflects their hobbies and includes National Geographic, Discovery Channel, and the Weather Channel.

MIDLIFE CONSTANTS

Average Household Size: 2.31 people

Median Age: 47.0 years

Median Household Income: $53,200

Midlife Constants residents are seniors, at or approaching retirement, with below average labor force participation and above 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. Consumer preferences include:

- Traditional consumers that prefer convenience and comfort over the latest trends
- In terms of media, residents choose radio and newspapers.
- There is a strong preference towards DIY home improvements and gardening.
- Social activities and giving back to the community are often intertwined through fund raising and volunteer work.
- Residents choose practical vehicles like SUV and trucks.
- Leisure activities include movies at home, reading, fishing, and golf.

THE GREAT OUTDOORS

Average Household Size: 2.44 people

Median Age: 47.4 years

Median Household Income: $56,400

These neighborhoods are found in pastoral settings throughout the United States. Consumers are educated empty nesters living an active but modest lifestyle. Their focus is land. They are more likely to invest in real estate or a vacation home than stocks. They are active gardeners and partial to homegrown and home-cooked meals. Although retirement beckons, most of these residents still work, with incomes slightly above the US level. Consumer preferences include:

- Do it yourself and cost conscious.
- Residents often service their vehicles, work on home improvement and remodeling projects, and maintain their yards.
- Resident support various civic causes and are often members of veteran's clubs.
- The majority of households have pets.
- For television, popular channels include CMT, History, and Fox News.
- Popular leisure activities include hiking, hunting fishing, and boating.

ROOTED RURAL

Average Household Size: 2.48 people

Median Age: 45.2 years

Median Household Income: $42,4300

Rooted Rural is heavily concentrated in the Appalachian mountain range as well as in Texas and Arkansas. Employment in the forestry industry is common, and Rooted Rural residents live in many of the heavily forested regions of the country. Nearly 9 of 10 residents are non-Hispanic whites. This group enjoys time spent outdoors, hunting, fishing, or working in their gardens. Indoors, they enjoy watching television with a spouse and spending

time with their pets. When shopping, they look for American-made and generic products. These communities are heavily influenced by religious faith, traditional gender roles, and family history. Consumer preferences include:

- Favor DIY, growing their own produce, and working on their vehicles and ATVS.
- Residents prefer to pay bills in person and avoid internet for financial transactions.
- Clothes purchases are driven by necessity rather than trend.
- Pets are part of the households. Leisure activities include hunting and fishing.
- Country and religious radio is popular.

OLD AND NEWCOMERS

Average Household Size: 2.12 people

Median Age: 39.4 years

Median Household Income: $44,900

This market features singles' lifestyles, on a budget. The focus is more on convenience than consumerism, economy over acquisition. Old and Newcomers is composed of neighborhoods in transition, populated by renters who are just beginning their careers or retiring. Some are still in college; some are taking adult education classes. They support charity causes and are environmentally conscious. Age is not always obvious from their choices. Consumer preferences include:

- These consumers are attentive to environmental concerns.
- They prefer latest technology over purchasing a vehicle.
- Residents often part take in charity and have a strong sense of community.
- In terms of food, residents seek convenience, frozen and fast-food.
- Internet is the primary source of entertainment followed by watching movies at home, listening to country music, and reading the paper.

ADDITIONAL MARKET PREFERENCES

Restaurant preferences for adults in the regional trade area show that the population most frequently dined at fast food/drive-in restaurants in recent months.[7] 92% of the population dined at a fast food/drive-in restaurant in the last 6 months, and of those that did go to fast food restaurants, 36% went 9+ in the last month. About 10,000 patrons, or 74% of the adult population, went to a family restaurants/steak house in the last 6 months. A quarter of that group dined out at this style of restaurant 4+ times a month. These data indicate something priced affordability with takeout options, that is differentiated from what already exists in the market, has the potential to perform best with existing consumer preferences

The Market Potential Index (MPI) measures the relative likelihood of the adults or households in the regional trade area to exhibit certain consumer behaviors or purchasing patterns compared to the U.S. overall. A MPI of 100 represents the U.S. average. The greatest MPI in the regional trade area are American-made products. Other qualities that consumers look for more than the average American include quality, price, and the ability to use coupons for purchase.

[7] Note that this data lags with retail trends like delivery that have expanded since the outbreak of COVID-19.

Restaurant Preferences - Regional Trade Area		
Restaurants	Expected Number of Visitors 18+	Percent of All Adults in Regional Trade Area
Went to family restaurant/steak house in last 6 months	10,062	74%
Went to family restaurant/steak house: 4+ times a month	3,401	25%
Went to fast food/drive-in restaurant in last 6 months	12,591	92%
Went to fast food/drive-in restaurant 9+ times/month	4,959	36%
Fast food restaurant last 6 months: eat in	5,298	39%
Fast food restaurant last 6 months: home delivery	860	6%
Fast food restaurant last 6 months: take-out/drive-thru	6,659	49%
Fast food restaurant last 6 months: take-out/walk-in	2,433	18%

Source: Esri forecasts for 2019 and 2024; Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics.

Psychographics - Regional Trade Area	
Consumer Behavior	MPI
Buying American is important to me	127
Usually buy items on credit rather than wait	88
Usually buy based on quality - not price	101
Price is usually more important than brand name	105
Usually use coupons for brands I buy often	108
Am interested in how to help the environment	80
Usually pay more for environ safe product	81
Usually value green products over convenience	82
Likely to buy a brand that supports a charity	104

Source: Esri forecasts for 2019 and 2024; Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics.

TOURISM AND RECREATION MARKET ANALYSIS

Essex County and Ticonderoga are located within the Adirondack Region, which is responsible for 2% of the state's total tourism sector. In 2017, 8% of the state's tourism spending occurred within the Adirondack Region. Tourism spending within the Adirondack Region generated 19% of total employment. Furthermore, of the regions where the strongest 2016 to 2017 growth in traveler spending occurred was the third strongest in the Adirondacks, which grew by 5.5% to $1.4 million in 2017.

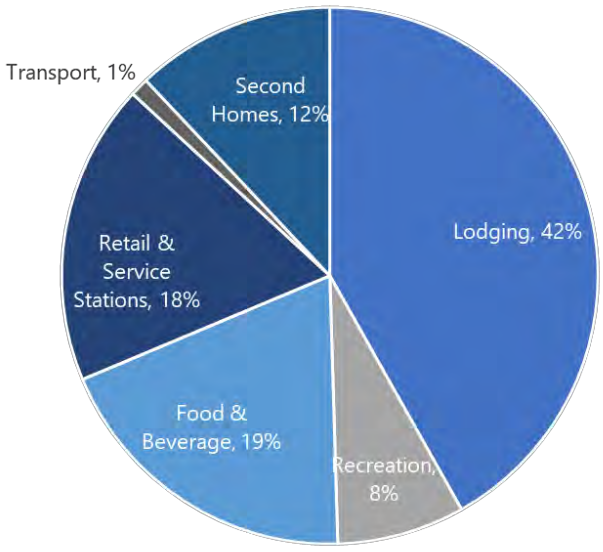
Essex County represents 33% of the Adirondack Region's tourism sales with nearly $133 million in direct traveler spending. Essex County is home to several tourism attractions including Lake Placid, Lake Champlain, and Lake George. In total the tourism industry in Essex County supported 5,761 workers and $219 million in income. Fiscally, the tourism industry contributed to $33 million in local taxes and $26 million in state taxes. On average, tourism saves each household in Essex County $3,857 in taxes each year.

Essex County Tourism Impacts, 2017		
Category	Amount	
Direct Spending	$	132,545,000
Direct Jobs		4,051
Total Jobs (Direct, Indirect, Induced)		5,761
Local Taxes	$	33,110,500
State Taxes	$	25,896,957
Tax Savings Per Household	$	3,857

Source: The Economic Impact of Tourism in New York, 2017

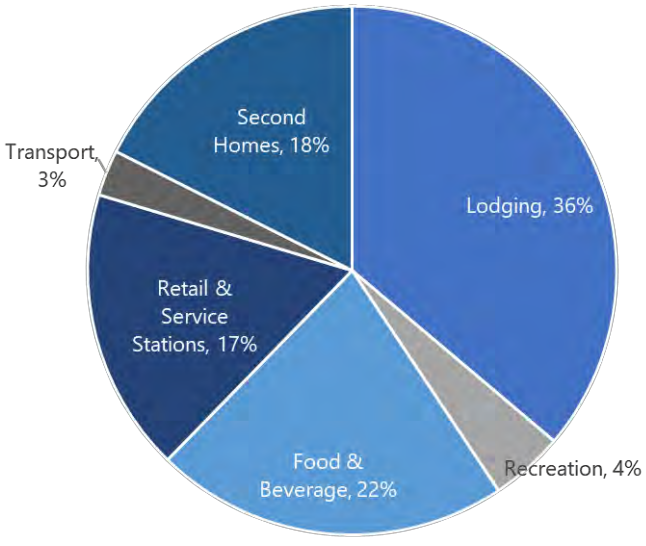
The breakdown of tourism spending by category shows Essex County tourists allocate most of their spending to Lodging (42%), followed by Food and Beverage (19%), and Retail and Service Stations (18%). Compared to the Adirondack Region, Essex County travelers spend a significantly higher proportion on Lodging and Food and Beverage. Conversely, Essex County travelers spend a smaller portion on Recreation, Second Homes, and Transport.

Essex County Tourism Spending, 2017



Source: The Economic Impact of Tourism in New York, 2017

Adirondack Region Tourism Spending, 2017



Source: The Economic Impact of Tourism in New York, 2017

TOURISM ECONOMIC TRENDS

The tourism sector is a group of industries that is primarily or very strongly supported by visitor spending. The figure below displays 22 industries that represent the tourism sector. Several of these industries serve both residents and visitors. It is important to note that 14 of the 22 industries are not present in Ticonderoga (12833).

Since 2014, the tourism industry has grown 13% in Ticonderoga with the majority of that growth occurring in Restaurants and Other Eating Places and Museums, Historical Sites, and Similar Institutions, which added 16 and 12 jobs respectively. During that time period, Traveler Accommodation, the highest earning tourism industry, shed jobs. Overall, average earnings per job are low in Ticonderoga's tourism sector at $27,000.

Looking forward to 2024, Ticonderoga's tourism sector can expect to grow by 11% with the majority of growth occurring in Restaurants and Other Eating Places and Museums, Historical Sites, and Similar Institutions.

Ticonderoga (12833) Tourism Jobs, 2014 - 2024

NAICS	Description	2014 Jobs	2019 Jobs	2024 Jobs	2014 - 2019 Change	2014 - 2019 % Change	2019 - 2024 Change	2019 - 2024 % Change	Avg. Earnings Per Job
7225	Restaurants and Other Eating Places	125	141	159	16	13%	18	13%	$23,529
7211	Traveler Accommodation	51	48	46	(3)	(6%)	(2)	(4%)	$37,222
7121	Museums, Historical Sites, and Similar Institutions	34	46	53	12	35%	7	15%	$28,991
7139	Other Amusement and Recreation Industries	25	31	35	6	24%	4	13%	$29,513
4471	Gasoline Stations	25	27	28	2	8%	1	4%	$27,998
4453	Beer, Wine, and Liquor Stores	<10	<10	12	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
7224	Drinking Places (Alcoholic Beverages)	<10	<10	10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
4452	Specialty Food Stores	<10	<10	<10	Insf. Data	Insf. Data	Insf. Data	Insf. Data	Insf. Data
5615	Travel Arrangement and Reservation Services	0	0	0	0	0%	0	0%	$0
7111	Performing Arts Companies	0	0	0	0	0%	0	0%	$0
7112	Spectator Sports	0	0	0	0	0%	0	0%	$0
4879	Scenic and Sightseeing Transportation, Other	0	0	0	0	0%	0	0%	$0
7114	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	0	0	0	0	0%	0	0%	$0
7115	Independent Artists, Writers, and Performers	0	0	0	0	0%	0	0%	$0
4872	Scenic and Sightseeing Transportation, Water	0	0	0	0	0%	0	0%	$0
7131	Amusement Parks and Arcades	0	0	0	0	0%	0	0%	$0
7132	Gambling Industries	0	0	0	0	0%	0	0%	$0
4871	Scenic and Sightseeing Transportation, Land	0	0	0	0	0%	0	0%	$0
4855	Charter Bus Industry	0	0	0	0	0%	0	0%	$0
7212	RV (Recreational Vehicle) Parks and Recreational Camps	0	0	0	0	0%	0	0%	$0
4511	Sporting Goods, Hobby, and Musical Instrument Stores	0	0	0	0	0%	0	0%	$0
7113	Promoters of Performing Arts, Sports, and Similar Events	0	0	0	0	0%	0	0%	$0
Total		282	318	352	36	13%	34	11%	$27,270

Source: EMSI

TOURISM ASSETS

The peak tourism season in Ticonderoga is centered around summer and occurs from mid-May through mid-October. The majority of second homeowners and visitors leave in the fall, as Ticonderoga and much of the North Country Region does not have an all-season tourism market.

There are several tourism assets within Ticonderoga as detailed below by category. This tourism asset list can be shared and updated regularly to enhance the community's engagement and appreciation for the tourism sector.

HISTORIC/CULTURAL ASSETS

Ticonderoga served as a military base throughout the French and Indian War and the American Revolutionary War. Following the wars, Ticonderoga became a prominent location for wood and paper manufacturing. As such, much of the town's historic and cultural assets are deeply rooted in military and paper manufacturing.

Fort Ticonderoga is the largest tourist attraction in the Town of Ticonderoga. The 2,000 acre property offers tours of the Fort, boat cruises, a botanical garden, corn maze, and other programming. The 2016 Fort Ticonderoga Economic Impact Report estimated that more than 75,000 visitors to the Fort generated a total of $12.1 million in economic impact annually. Furthermore, the report estimates that 56,000 people visit the Ticonderoga area for the first time each year and that 85% of guests note the Fort as the primary reason for visiting the area. As a significant tourism draw, the Fort represents an opportunity to entice visitors to downtown. On average each guest of Fort Ticonderoga spends $89.24 on lodging, food and beverage, entertainment, retail and gas. The majority of that spending goes towards lodging at 31% and food and beverage 30%. Fiscally, visitation to Fort Ticonderoga supports an estimated $1.1 million in state and local taxes and $1.4 million in federal taxes. Fort Ticonderoga is actively working to create a year round experience by offering lectures and workshops throughout the winter months.

Fort Ticonderoga

Source: Fort Ticonderoga

Other historic assets in Ticonderoga include the Historic French Sawmill, Hancock House, Liberty Monument, and the Ticonderoga Heritage Museum and History Center. Ticonderoga Heritage Museum and History Center is the original office built by the Ticonderoga Pulp and Paper Company in the 1800s. The center is located at the beginning of the La Chute River Trail.

NATURAL ASSETS

The Town of Ticonderoga is uniquely positioned between Lake George and Lake Champlain. These two lakes can be accessed by boat launches, with Mossy Point Boat launch into Lake George and the Ticonderoga Boat Launch into Lake Champlain. Black Point Public Beach is located on the northern end of Lake George and is a well visited beach by visitors and residents alike. In addition to the Ticonderoga Boat Launch the Fort Ferry offers service from Ticonderoga to Vermont. In town, the La Chute River Trail is a three-mile trail that includes a self-guided walking tour highlighting the history of the river and Ticonderoga. The trail overlooks waterfalls and rapids. Located on the trail is the Frazier Bridge, one of the oldest bridges in the country, and the Historic French Sawmill which is currently undergoing renovations by PRIDE. Another natural resource is King's Garden, a botanical garden that is part of the Fort Ticonderoga property.

The town and Adirondack region are rich in hiking, biking, and snowmobiling trails. This includes the Empire State Trail, the 750-mile trail that extends from Buffalo to Albany west to east, and northern border to New York City north to south. The trail aims to be completed by the end of 2020 and will boost Fort Ticonderoga as a stop.

RETAIL, RECREATION, AND RESTAURANTS

The second largest tourism attraction, behind Fort Ticonderoga, is the Star Trek Original Series Set Tour. Star Trek Original Series Set Tour displays sets from the STAR TREK television series using the original blueprints and attracts over 10,000 visitors a year. James Cawley, the owner of Star Trek Original Series Set, plans to expand operations into the adjacent JJ Newberry Co building to allow for the Star Trek Next Generation Set Tour.

Ticonderoga was once home to Adirondack Lanes and a golf course, an establishment that won Adirondack Life magazine's best within the Adirondack Park in 2015. Unfortunately, faulty electrical problems led to fires that ceased operations at both the bowling alley and golf course. The golf course is now in operation following a $3 million renovation. However, the bowling alley is no longer in operation with no current plans to rebuild.

Food establishments in downtown Ticonderoga cover a mix of cuisines including pizza, cafés, Chinese, diner, and pub food. According to stakeholder interviews most restaurants close in the winter. The Ticonderoga Natural Foods Co-op is a health foods store on Montcalm Street that is well visited by residents, second homeowners, and visitors. The co-op aims to expand to keep up with market demand.

In terms of tourism related retail, Ticonderoga has a mix of small shops and antique shops. Sugar & Spice Country Shoppe offers a variety of unique items and is a popular shopping destination for visitors and residents. Stakeholders did note that parking downtown is perceived to be limited and can hinder shoppers.

LODGING

Interviewees noted that the majority of visitors are day visitors and that lack of quality accommodation options hinders overnight visits. The lodging anchor in Ticonderoga is the Best Western Plus on Burgoyne Road. Other lodging options within Ticonderoga include Super 8, Stone House Motel & Motor Lodge, Circle Court Motel, and Latchstring Motel. The traditional accommodation options within the town are 2-star options. There are also limited AirBnB options within the town ranging from private room to entire houses. According to the Adirondack Explorer, there are plans to build a boutique hotel at the Cobbler's Bench furniture store site. [8]

Since Fort Ticonderoga is the primary driver of tourism, the town conducted an economic impact analysis of its annual visitation and determined that 54% of guests spent one night in commercial lodging as part of their visit while 24% of guest spent the night in commercial lodging in and around the Town of Ticonderoga. As visitation at the Fort continues to grow it will be critical to offer additional lodging options to capture outside spending.

[8] https://www.adirondackexplorer.org/stories/reinforcing-ticonderoga

RECREATION MARKET POTENTIAL

The tables below show spending by regional trade area residents on select recreational activities. Variables shown include the average annual spending per household in the regional trade area on a particular good or service and the spending potential index (SPI) for the regional trade area. The SPI represents household expenditures on a product or service relative to a national average of 100. An SPI greater than 100 indicates that, on average, households within the local trade area spend more on that particular good than the average U.S. household.

The SPI is a good preliminary measure used to identify market characteristics that may necessitate additional attention. The Average Amount Spent also helps provide a baseline for prospective businesses to gauge price points and spending potential within certain categories.

The first table shows the SPI and average spending by Recreation Category, organized by highest to lowest SPI. Recreational Vehicles and Fees show the highest SPI, slightly above the national baseline. Spending within this category is the third highest after T/Video/Audio, and Entertainment/Recreation Fees and Admissions. The second table breaks down the spending by category in Recreation Vehicles and Fees. The average amount spent on boats/trailers/campers/RV rentals is $31. The SPI shows that the spending on payments and rentals for recreation equipment exceed average spending.

Recreation Expenditures by Category - Regional Trade Area		
Recreation Category	Spending Potential Index	Average Amount Spent
Recreational Vehicles and Fees	106	$170
Tv/Video/Audio	90	$1,102
Reading	84	$89
Toys/Games/Crafts/Hobbies	81	$96
Sports, Recreation and Exercise Equipment	79	$164
Photographic Equipment and Supplies	74	$39
Entertainment/Recreation Fees and Admissions	66	$473

Source: Esri forecasts for 2019 and 2024; Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics.

Recreation Vehicles and Fees - Subcategories		
Subcategory	Spending Potential Index	Average Amount Spent
Docking and Landing Fees for Boats and Planes	81	$8
Camp Fees	60	$40
Payments on Boats/Trailers/Campers/RVs	156	$91
Rental of Boats/Trailers/Campers/RVs	125	$31
Total Spending Recreational Vehicles and Fees	**106**	**$170**

Source: Esri forecasts for 2019 and 2024; Consumer Spending data are derived from the 2016 and 2017 Consumer Expenditure Surveys, Bureau of Labor Statistics.

FUTURE OF TOURISM

Fort Ticonderoga is in the process of planning a $70 million capital campaign that includes a hotel on site, wedding venue/meeting space, a new museum facility, increased food and beverage offerings, and increased recreational experiences. These transformations aim to enhance the visitor experience at the Fort and increase overall visitation through increased duration on the property, overnight stays, and weddings and events. The capital campaign investment will create a critical boost to the Ticonderoga economy and allow for establishments downtown to benefit from increased regional visitation. Investments of this size and nature often lead to major shifts in attitudes for the local development community. Knowing that this transformation is occurring in Ticonderoga can spark other investment throughout the town – investors who see the opportunity to build on the momentum by establishing shops, restaurants, housing, etc. before the Fort's renovations are complete.

It is important to note that development at the Fort should not take away from any proposed development downtown, but rather create a mutually beneficial situation where the Fort and downtown continue building out the tourism market in Ticonderoga.

Based on the existing tourism assets in Ticonderoga and the surrounding region and acknowledging the future plans at the Fort of Ticonderoga, the Town of Ticonderoga should focus on:

- **Building out the tourism shoulder seasons across the town to expand Ticonderoga's presence in the tourism market.** First, Ticonderoga should work to supplement events in the late fall and early spring to build on its current tourism season. This could take the shape of pop up plant markets in the spring or fishing tournaments in the fall. Once further established, winter events such as ice fishing tournaments, snow shoeing, etc. can be created and marketed to build out the full tourism season.
- **Establishing downtown accommodation options to attract more overnight visitors and increase spending downtown.** Proposed accommodation options at Fort Ticonderoga will primarily cater to Fort visitors and wedding/event guests while accommodations downtown will attract visitors seeking an authentic downtown environment. It will be critical to make these two markets distinct. A downtown accommodation should promote walkability and accessibility to downtown attractions.
- **Capitalizing on youth sports programming and events.** The youth sports industry has created a boom in several communities across the nation. Youth travel events create an opportunity for communities to capture outside spending and enhance economic development. Examples of sporting events that would fit the regional demographic of the area include sailing, fishing, cross country skiing, and golf.
- **Drawing trail users to downtown establishments.** Bike trails present a great opportunity to bring visitors downtown. Ticonderoga should continue building out amenities to supplement trail users of both the LaChute River trail and the Empire State bike trail, such as expanding takeaway food and beverage options, offering outside seating, and ensuring there are bike repair and rental options. It is important to ensure these additions are visible from both trails through wayfinding and marketing brochures in local businesses.

ATTACHMENT A: DATA SOURCES

PROPRIETARY DATA SOURCES

ECONOMIC MODELING SPECIALISTS INTERNATIONAL (EMSI)

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

ESRI BUSINESS ANALYST ONLINE (BAO)

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

PUBLIC DATA SOURCES

AMERICAN COMMUNITY SURVEY (ACS), U.S. CENSUS

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

ONTHEMAP, U.S. CENSUS

OnTheMap is a tool developed through the U.S. Census Longitudinal Employer-Household Dynamics (LEHD) program that helps to visualize Local Employment Dynamics (LED) data about where workers are employed and where they live. There are also visual mapping capabilities for data on age, earnings, industry distributions, race, ethnicity, educational attainment, and sex. The OnTheMap tool can be found here, along with links to documentation: http://onthemap.ces.census.gov/.

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