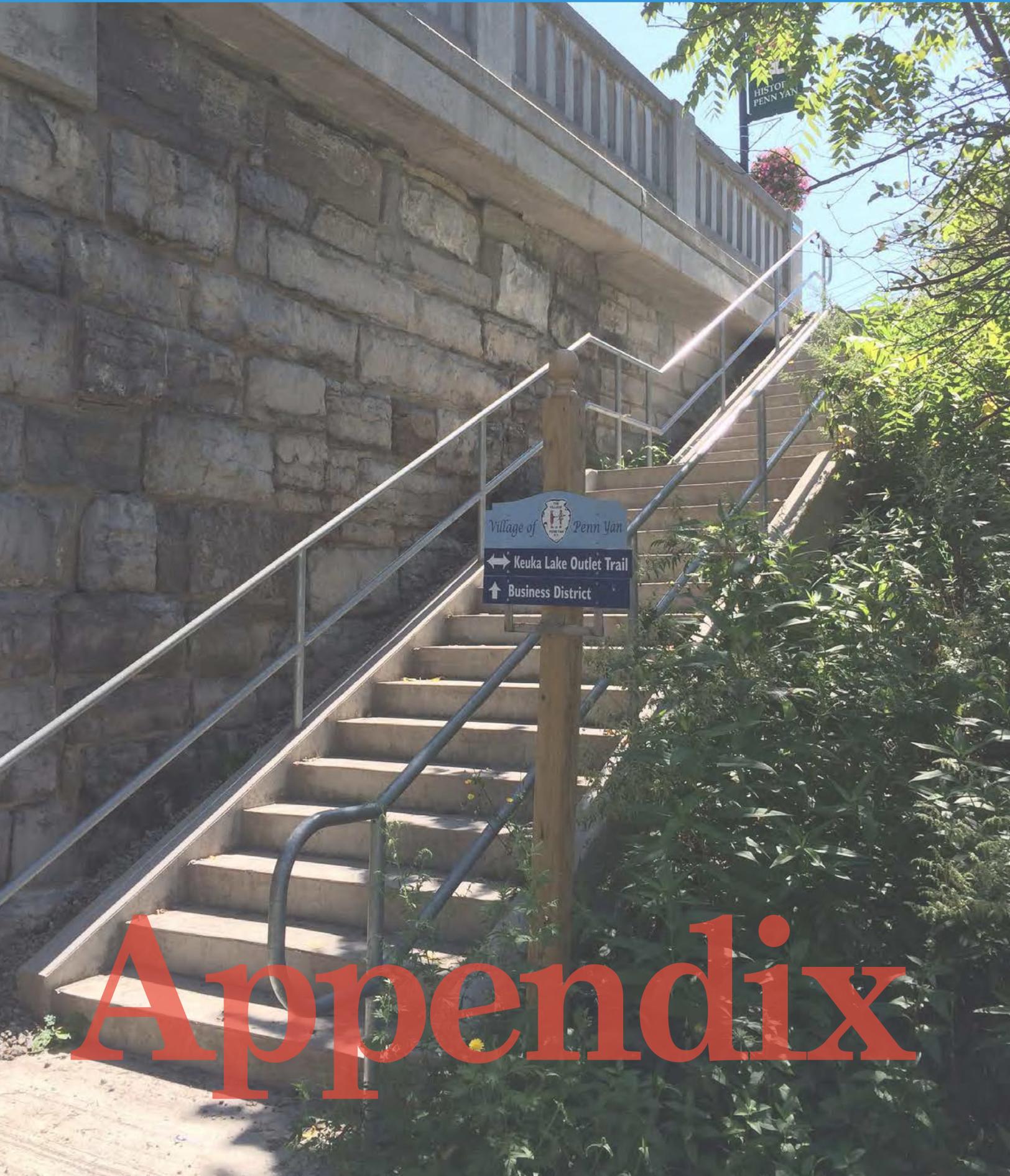




Village of Penn Yan - 2016 Comprehensive Plan



Appendix



Village of Penn Yan – Community Workshop Minutes

Held on October 15, 2014 from 7:00 to 9:00 PM

At Penn Yan Academy

Attendees: J. Steinmetz, J. Steinbach, M. Gaudioso, and G. Kellogg from the Consultant Team with approximately 50 residents and stakeholders.

Mr. Steinmetz welcomed the attendees and thanked them for coming out to the workshop. He then introduced the members of the consultant team and gave a brief overview of each firm's role and experience in relation to the Penn Yan Plan Update. Following the introductions, Mr. Steinmetz gave a short presentation on comprehensive planning, its benefits, and why it is important to the Village of Penn Yan. Mr. Steinmetz ended the presentation with a brief overview of the Village's proposed planning process and timeline.

Digital remotes were then handed out to each attendee for the completion of a Community Preference Survey, an activity in which participants rated images of other communities on a scale of zero to nine to indicate their preferences for potential development within the Village. Ms. Gaudioso instructed the group on how to vote with the remotes and to base their decisions on the overall appearance of the development or sites in the images paying special attention to architecture, landscaping, signage, parking, and screening. At the end of the 65-image survey, Ms. Gaudioso led a discussion of key image comparisons based on franchise architecture, commercial and multi-family development, façade treatments, and streetscapes.

Following the survey, Mr. Steinmetz then divided the attendees into four groups of approximately 12 people each. Mr. Steinmetz (Group 1), Ms. Gaudioso (Group 2), Mr. Steinbach (Group 3), and Mr. Kellogg (Group 4) facilitated discussions with their respective groups based on the perceived Strengths, Weaknesses, Opportunities, and Threats (SWOT) for the Village. The results of each of group's SWOT analysis are outlined on subsequent pages.

As each group discussion came to an end, the attendees were given three sticker dots to place by items on any topic they felt was the most important to address as part of the Comprehensive Plan. The number of dots an issue received is indicated by a star (★) on the following pages. The attendees were then thanked for their time and participation and encouraged to wander the room to take a look at each group's SWOT results.

SWOT Analysis Results by Group

STRENGTHS

Group 1:

- Tourism **
- Lake *
- Restaurants *
- A lot of old people (retirees involved in community) *
- Outlet trail *
- Walkability, village feel
- No commute
- Low crime
- Wine industry
- Historical
- Good schools
- Proximity to culture, shopping, etc.
- High volunteerism – civic and fraternal organizations
- Friendliness of the people, good sense of community
- Mennonite community, rural landscapes
- Local shops, services, and bars
- Rolling, scenic landscapes
- Hospital
- Access to fresh food
- College – business support, athletics, events, etc.; expertise; student contributions
- Faith community
- Services – Volunteer Fire Department, Police Department
- Returning retirees – good place to retire
- Lakefront Parks

Group 2:

- Keuka Lake and Outlet Trail ***
- Agriculture / access to fresh food *
- Wine/Beer industries *
- Small Businesses *
- Beauty – Scenic, environmental amenities, hills and valleys
- Seasonal tourism
- Experience four seasons
- Safe
- Rich history
- Great people, diverse – Mennonite Community
- Small-town character and charm
- Micro-Climates – mild weather/winter lends to agriculture/viticulture
- Community services – Library/Schools/Churches/Hospital

- Great architecture in community
- Airport
- Low Electric Rates
- Active Service Organizations
- Arts/Gallery
- Sports/Activities for Kids
- Recent Development (Hotels/Commercial)
- Seasonal tourism
- No meter parking
- County Seat

Group 3:

- Wine industry ****
- Lake **
- Viable Mennonite Community *
- Keuka College *
- Walkability *
- Access to water
- Largely a farming community
- Number of involved citizens
- Quaint feel
- Good base of tourism
- Many religious denominations
- Outstanding library
- Return of retirees
- Art Center and Gallery
- Sampson Theatre
- Keuka Outlet Trail
- Proximity to other cities
- Living Well (local group)
- Safe and affordable
- Good community services – schools, hospital, Village utilities
- Economic development and revitalization
- Friendly community, welcoming, polite drivers
- Tremendous volunteerism
- Golf Course
- Community Court
- Historical District
- Airport

Group 4:

- The lake *****
- Historic Character ***
- The wineries / breweries *
- Sense of community and camaraderie, good people *
- The name – diverse, unique, historic, “Pennsylvania Yankee”
- Farming Community

SWOT Analysis Results by Group

- Good size – big enough and small enough
- Historic District (on National/State Register)
- Affordable
- Diversity (modern and Mennonite community)
- Keuka College
- Small town merchants
- Birkett's Landing and Mills
- Golf Course
- Seneca Farms
- Morgan's Groceries
- The Windmill
- The Wagner
- Mennonite farms and stands, horse and buggies
- Marina and waterfront development
- Low Crime
- Airport
- Many churches
- Hospital
- Potential for growth on open land
- Outlet Trail
- County Seat
- Local newspaper
- Habitat for Humanity
- Above ground wiring ★
- Signage – Inconsistent, character, poor wayfinding ★
- Limited Resources – Money and human capital
- Slow to get things done
- High taxes and gas prices
- Lack of access to waterfront
- Façade maintenance – painting, upkeep
- Still some vacancies on Main Street
- Seasonal swing in economy due to tourism – PT jobs, etc.
- Parking
- Seasonal residents (no buy-in)
- Lack quality, diverse restaurant selection
- Post Office façade needs face lift
- Lack of mental health services – especially for children

WEAKNESSES

Group 1:

- No pool in Penn Yan ★★★★★
- Limited draw to keep young here ★★
- Limited waterfront development ★
- Lack of middle income housing ★
- Lack of senior housing ★
- Many young people don't stay ★
- Over policed ★
- Haven't drawn people from "Windmill" – Need stronger destination, No overnights, could be more
- Nothing to do on Sunday
- Local municipal divisions work against regional development strategy
- Need better parks/playgrounds
- Lack of public transportation
- Limited recreational opportunities for seniors
- No stores open at night, limited nightlife for young people

Group 2:

- Housing – Poor condition, lack of affordability and choices ★★★★★
- No public transportation ★★
- Poverty ★

Group 3:

- Lack of jobs ★★
- Brain drain ★
- Keuka outlet trail (maintenance) ★
- Village parks ★
- Lack of quality restaurants ★
- Taxes are high ★
- Drugs
- Lack of housing
- Too many drugstores
- Poverty, low-income level; poor county
- Lack of public transportation
- Aged infrastructure and lack of future infrastructure planning
- Lack of funds for infrastructure
- Technologically challenged (village services)
- Diminishing services
- Lack of youth activities
- Lack of community center / activities programming
- Flooding
- No good museum; Arts and culture lacking
- Lack of cohesiveness visually
- Red Cross left (local office/branch)
- Lack of good wages
- Feral cats
- Parking
- Sidewalk conditions
- Village not taking part in winery tourism
- Payment in Lieu of Taxes (PILOT) detrimental
- Environmental issues with past industry

SWOT Analysis Results by Group

Group 4:

- Parks/Lake connection to downtown / Main Street ★★★
- High Taxes ★★
- Drugs ★
- No Sales Tax Revenue ★
- Shortage of senior living opportunities ★
- Lack of really good restaurants ★
- Lack of private employment ★
- Lack of jobs for grads ★
- Roads in need of repair
- Low-income housing projects
- Single-family unit conversion to multi-family, can be tax burden
- Lack of public transportation
- Lack of middle- and upper-income housing
- No Community Center
- County Seat
- Low-end motel
- No fishing pier
- Lack of cultural arts
- Not tourist friendly – no path around lake, charge for boat access
- Trail used by drug dealers, not safe
- Disconnect between community and Keuka College
- Downtown does not reflect the Mennonite Community – no facilities for horse and buggy
- Lack of parking downtown, no visual appeal to parking
- Public education is not as strong as it used to be
- Not enough big businesses for jobs
- Need pedestrian access (Lake & Liberty), create walkability community
- Get rid of the jail
- Lack of qualified employees for labor jobs
- More bicycle friendly

OPPORTUNITIES

Group 1:

- Theater / Cultural Events / Attractions ★★★
- Facilitate an awareness of why planning is important ★
- Activities for all ages ★
- Wine industry / tourism (we should cater to them) ★
- Proximity to Corning, Watkins Glen, Canandaigua
- Rehab older buildings for housing (upper floors)

- Spot / Focused development incentives
- Build on Saturday into Sunday
- Capitalize of celebrating getaways
- More strategic thinking
- Incentives for landlords to keep up properties

Group 2:

- Upgrade/re-urbanize Downtown (housing and mixed-use of 2nd, 3rd floors) ★★★
- Could be destination village ★★
- Community Center Development – Swimming program, fitness center, YMCA ★
- Ensure completion of current proposed projects ★
- Opportunity for development/businesses to have design considerations ★
- Sampson Theatre ★
- Become a year-round tourism community ★
- Road Maintenance
- Fulfill need for low-cost and middle income housing
- Provide increased housing choices
- Design of new construction, especially residential
- Opportunity to create interesting and attractive affordable housing – Typically doesn't fit in.
- Increased communication with and access to Keuka College
- After school programming
- Kids/Youth entertainment (birthday party places, batting cages)
- Can highlight agriculture better – organic farms, “farm to table movement”
- Progressive Senior Communities / lifestyle community – addresses different ages/needs, etc.
- Senior Center
- Retirement Friendly – things to do, reasons to stay
- Maintain walkability
- Village services for removing leaves/branches/etc.

Group 3:

- Jobs – bring in more, better paying ★★★★★
- Community Center ★★★
- Better rental housing ★★
- Business promotion specific to Penn Yan ★★
- Development of Lake Outlet ★
- Improve low/middle class housing ★
- Senior housing ★

SWOT Analysis Results by Group

- Tourist-based businesses ★
- More cultural integration ★
- Educational System that delivers to the community ★
- Greener, more sustainable community ★
- Improve quality of workforce
- Solar/wind technology implementation; energy conservation
- Finger Lakes Museum
- Workforce gained from returning retirees
- Pool
- Variety in retail
- Working more closely with Mennonite Community
- Road network channels people to here
- Flooding gives chance to improve housing, revitalization, infrastructure
- Local resources for food, etc.
- Bike trails

Group 4:

- Waterfront ★
- Enhance Main Street (2nd & 3rd stories) ★
- Good planning process
- Sampson Theatre reuse
- Tourism industry
- Community Center
- Bring community together
- Wineries and breweries
- Downtown
- Mennonites
- Cooperation with Keuka College
- Baby boomer and retiree population
- Developable land for job creating industries and businesses
- Keep young people here

THREATS

Group 1:

- Growth – uncontrolled w/no plan ★★★★★
- Drug problem ★★
- Poverty ★★
- Poor Zoning ★
- Adversarial relationship among local municipalities ★
- Housing options may be negatively impacting the quality of residents ★
- Taxes ★
- Erosion of historic character ★
- New business could be a threat
- Franchise businesses

- Declining school enrollment (unused classes, no economy of scale, etc.)

Group 2:

- Disconnect of revenues related to growth and subsequent strain on village resources ★★★★★
- Lack of sharing increased future costs ★
- Have too few things that produce revenue ★
- Development pressures on utilities/electric services under current tax structure ★
- Imbalance of those contributing to community and those using resources ★
- Lack of high paying “living wage” jobs (FT)
- Property Taxes – 37% non-taxable properties
- County pressures (ex. Sharing sales tax)
- Minimal property maintenance b/c tax assessment

Group 3:

- Illicit Drugs ★★
- Heavy industry and fracking ★
- Youth with no direction or skill after high school ★
- Lack of signage to downtown
- Loss of younger community
- Resistance to change
- Flooding
- Climate change
- Big box, out of town retail
- Sidewalks conditions are hazardous

Group 4:

- Poorly planned development ★★
- Drug threat to kids and community ★
- Growing low-income community ★
- Population decline
- Crime
- Decline of school system
- Decreasing middle class
- Blighted areas

Community Workshop Comments

At the entrance to the Community Workshop three large boards were displayed with markers that asked attendees to answer questions about why Village residents choose to live in Penn Yan, why non-residents feel that the Village is important, and what they thought Penn Yan should be in the year 2025. The following is a listing of all written comments by board topic:

- I. I am a Village resident, and I live in Penn Yan because...
 - a. I moved here for work, then settled here so my son could attend school
 - b. Bought a business here
 - c. I live in Penn Yan because of the beauty and agriculture
 - d. Grew up here. Returned after Military Service. Bought a home in the Village for in town convenience and municipal utilities. Now a business owner.
 - e. It's not too far from home (Saratoga) and I love being a part of the wine industry
 - f. I work here, LIVE here, love the people, community, lake, and involvement
 - g. Walk to work
 - h. St. Michael's School!!
 - i. Grew up here, returned with family for better quality of life
 - j. St. Michael's School – excellent start and easy transition to PYCSD

- II. I am a Non-Village resident, and Penn Yan is important to me because...
 - a. Because it's our Town, where we do our shopping, banking, dining, etc.
 - b. It is the commercial and social hub of our community
 - c. It is the destination for development
 - d. We are neighbors
 - e. Nice community, gathering town
 - f. It's my hometown – my retirement destination
 - g. I work here
 - h. Tourism, retail businesses
 - i. Location
 - j. Pride to make it what it once was... where I say I'm from even though I live in Branchport
 - k. Business is in town
 - l. Our business is in town, our shopping, church, bank, etc.
 - m. It's the heart of our County and it has so much potential!

- III. In the year 2025 I'd like Penn Yan to be...
 - a. Sharing sales tax revenue with County government
 - b. A drug free community!!
 - c. A safer place to live
 - d. A town with more housing options for retirees
 - e. A place with more accessible public access to the waterfront
 - f. Have more community activities
 - g. Community center – pool, activities for seniors/teens/families, swimming lessons, kayaks, cross country skiing, sailing lessons
 - h. A destination – the jewel of the Finger Lakes
 - i. Walkway by lake so residents and tourists could enjoy
 - j. Vibrant downtown
 - k. A place to be proud of
 - l. Electric wires buried

Community Workshop Comments

- m. Thriving
- n. More attractive
- o. On the lips of regional day-trippers as a place to shop, play, enjoy the beauty of lake county.
- p. Bring our Mennonite culture to our town
- q. More happening
- r. Proud of itself
- s. Bursting with possibility, prosperity, and promise
- t. A place with fewer empty storefronts on Main Street
- u. Planning for the future again!
- v. Destination
- w. Top destination for food and beverage
- x. Better restaurants
- y. Destination for the northeast and beyond
- z. Merged with Yates County Sheriff Office to eliminate police and overkill with cops and tyrannical enforcement on citizens

Attendees were also given the opportunity to submit written comments on provided comment sheets at the forum. These anonymous responses are included below:

- In my opinion the Village of Penn Yan needs more non-income based rental units such as Burkett Landing. This would include “well elderly” housing.
- Please avoid at all cost any reference or focus on anything that refers to Agenda 21 on Sustainable Development. These are “buzz words” for socialist central planning. Do not follow this model. Freedom is lost to central elite planners.
- Penn Yan in not inviting for young families. No community center with a pool or activities for young children. Sidewalks are a mess. Not pedestrian friendly outside of business district. Not enough cultural, educational activities for young families. Not enough good playgrounds for kids. The ones existing need major updates. In the summer there are not enough programs for kids. Penn Yan needs a community center desperately. Thanks.

Village of Penn Yan - Comprehensive Plan Update Community Preference Survey Results

The following is a summary of the Community Preference Survey (CPS) conducted in October of 2014, at the Community Workshop. The survey results are presented based upon the responses of attendants, beginning with the least desirable images (lowest possible score was 0) to the most desirable images (highest possible score was 9).



Image #36

| | |
|------------------------------------|-------------|
| Average Score: | 1.29 |
| Median Score: | 1.00 |
| % Responses Less Than 4: | 90% |
| % Responses Greater Than 6: | 6% |



Image #51

| | |
|------------------------------------|-------------|
| Average Score: | 1.34 |
| Median Score: | 1.00 |
| % Responses Less Than 4: | 92% |
| % Responses Greater Than 6: | 2% |



Image #5

| | |
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| Average Score: | 1.53 |
| Median Score: | 1.00 |
| % Responses Less Than 4: | 88% |
| % Responses Greater Than 6: | 4% |



Image #62

Average Score: 1.67
Median Score: 1.00
% Responses Less Than 4: 81%
% Responses Greater Than 6: 4%



Image #8

Average Score: 1.77
Median Score: 1.00
% Responses Less Than 4: 83%
% Responses Greater Than 6: 4%



Image #59

Average Score: 1.94
Median Score: 2.00
% Responses Less Than 4: 78%
% Responses Greater Than 6: 2%



Image #19

Average Score: 1.96
Median Score: 2.00
% Responses Less Than 4: 76%
% Responses Greater Than 6: 2%



Image #40

Average Score: 2.06
Median Score: 2.00
% Responses Less Than 4: 78%
% Responses Greater Than 6: 6%



Image #54

Average Score: 2.51
Median Score: 2.00
% Responses Less Than 4: 67%
% Responses Greater Than 6: 4%



Image #25

Average Score: 2.60
Median Score: 2.00
% Responses Less Than 4: 68%
% Responses Greater Than 6: 6%



Image #10

Average Score: 2.82
Median Score: 3.00
% Responses Less Than 4: 64%
% Responses Greater Than 6: 8%



Image #28

Average Score: 2.88
Median Score: 2.00
% Responses Less Than 4: 63%
% Responses Greater Than 6: 10%



Image #1

Average Score: 3.44
Median Score: 3.50
% Responses Less Than 4: 50%
% Responses Greater Than 6: 15%



Image #60

Average Score: 3.69
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% Responses Less Than 4: 43%
% Responses Greater Than 6: 16%



Image #29

Average Score: 3.69
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% Responses Less Than 4: 47%
% Responses Greater Than 6: 18%



Image #35

Average Score: 4.00
Median Score: 4.00
% Responses Less Than 4: 49%
% Responses Greater Than 6: 31%



Image #32

Average Score: 4.02
Median Score: 4.50
% Responses Less Than 4: 42%
% Responses Greater Than 6: 18%



Image #38

Average Score: 4.04
Median Score: 4.00
% Responses Less Than 4: 48%
% Responses Greater Than 6: 18%



Image #63

Average Score: 4.22
Median Score: 4.00
% Responses Less Than 4: 43%
% Responses Greater Than 6: 29%



Image #12

Average Score: 4.41
Median Score: 5.00
% Responses Less Than 4: 37%
% Responses Greater Than 6: 24%



Image #43

Average Score: 4.59
Median Score: 5.00
% Responses Less Than 4: 35%
% Responses Greater Than 6: 31%



Image #18

Average Score: 4.62
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Image #53

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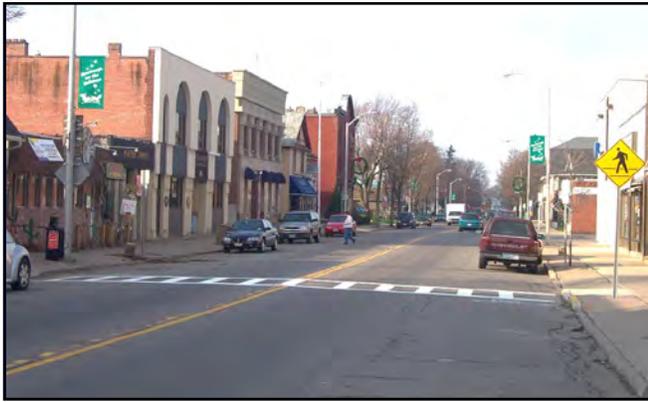


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Image #30

Average Score: 5.02
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Image #9

Average Score: 5.06
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Image #22

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Image #52

Average Score: 5.20
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% Responses Greater Than 6: 32%



Image #4

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% Responses Greater Than 6: 39%



Image #37

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Image #48

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Image #14

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% Responses Greater Than 6: 43%



Image #41

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Image #15

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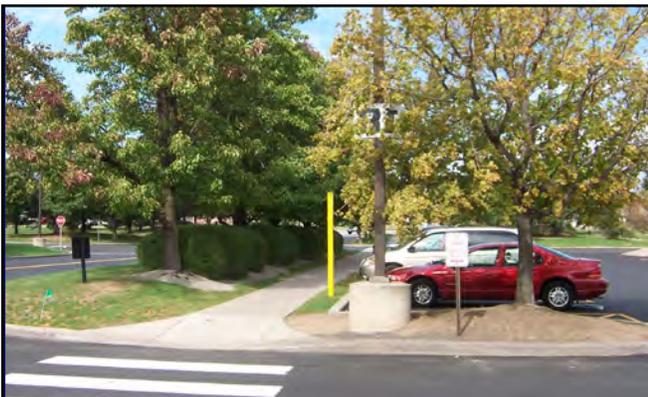


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Image #3

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Image #65

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Image #23

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Image #31

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Image #61

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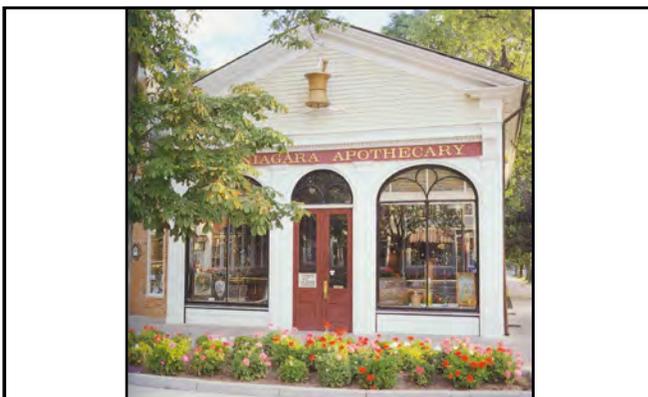


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Image #27

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Image #6

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Image #26

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Image #39

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Image #24

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| % Responses Greater Than 6: | 92% |



Image #64

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| Median Score: | 9.00 |
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| % Responses Greater Than 6: | 94% |

NOTES:

- 1. These pictures may not be reproduced without written permission.**
- 2. Image sources include, but are not limited to, the following:**
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 - The Conservation Fund
 - Flickr



Village of Penn Yan Youth Workshop Minutes Held on October 16, 2014

Classrooms: The Youth Workshops were conducted with two classes at Penn Yan Academy. Class 1 was an Environmental Studies class consisting of freshman, sophomores, and juniors. Class 2 was a Principles of Engineering class consisting of juniors and seniors. Class 1 began at 8:22 AM, with Class 2 immediately following at 9:00 AM.

Others Present: J. Steinmetz and M. Gaudioso

At the start of each class Mr. Steinmetz introduced himself and Ms. Gaudioso to the students, and provided them with some background on the planning profession and the purpose of the visit. He then gave the students a brief overview of the questions they were planning to ask: what did you like about growing up in Penn Yan, what didn't you like about growing up in Penn Yan, what are your post high school plans, and where do you see yourself in 10 to 15 years? Mr. Steinmetz then turned things over to Ms. Gaudioso who led a discussion with the students based on the previously listed questions. The results of that discussion for each class are outlined below.

I. What DID you like about growing up in Penn Yan?

Class 1:

- a. Scenery and the Lake
- b. Small community – “everyone knows everyone”
- c. Safe
- d. Going to the movies, skate park, library, bowling alley, etc.
- e. Starshine event
- f. Sports in the community
- g. Playgrounds (when younger)
- h. BOCES – for life/work planning
- i. Everyone came together after the flood (Branchport and Penn Yan)

Class 2:

- a. Lake – swimming and boating, easy access to the Lake with Indian Pines/Red Jacket Parks
- b. Small-town feel – know everyone
- c. Good food (Seneca Farms, etc.)
- d. Natural resources – woods, hunting
- e. Movie theater, bowling alley (when younger), Go-kart track,
- f. Outlet Trail
- g. Playgrounds, school facilities, baseball fields
- h. Events and festivals – Cruising night, Starshine
- i. Safe community
- j. Schools prepped students well

II. What DIDN'T you like about growing up in Penn Yan?

Class 1:

- a. Getting a job depends on who you know – need some connections
- b. Playground conditions (Pudgy's)
- c. Need more to do (recreation center, waterfront activities, gym for intramurals, pool)
- d. Want better school/work prep for future
- e. More restaurants/dining opportunities – locally owned, not chains
- f. No street lights – safety concern walking at night
- g. Need better equipment at parks, improve recreation facilities (skate park/movie theater)
- h. Bad rap of the skate park
- i. More places for teens to work (local stores/hands on jobs/trade jobs)
- j. Drug problem (heroin)
- k. Don't know where to go, or where the need is to volunteer

Class 2:

- a. No community center – can't learn to swim without a pool, basketball court
- b. Tourists – “wine people”
- c. No information center or signs (wayfinding)
- d. More clothing stores, shopping – have to go to Geneva or Canandaigua
- e. More local businesses – no more “WalMarts”
- f. No bicycle connectivity out in town – bike lanes, etc.
- g. Parking constraints

III. What are your post high school plans?

Class 1:

- a. Winery – take over from parents
- b. Marines
- c. Air Force
- d. Police Academy
- e. Alfred (auto mechanics/auto tech)
- f. Auto body/auto tech/mechanic
- g. Agriculture teacher
- h. College – undecided
- i. Work with kids
- j. Become a designer
- k. NFL
- l. Radiologist
- m. Carpenter

Class 2:

- a. Work at Daily Electric
- b. College – undecided
- c. College for 3D Animation
- d. Physical therapist
- e. College for electrical engineering, then start own business
- f. College through ROTC for aeronautical engineering, Pilot in the Air Force
- g. College for mechanical engineering

IV. Where do you see yourself in 10 to 15 years? Returning to Penn Yan?

Class 1: - Approx. 50% will return

- a. Will come back to retire or to visit
- b. Depends on job availability
- c. Will move back to be with family
- d. Want to go west
- e. California – seems like friendly, genuine community
- f. North Carolina for better weather

Class 2: - Approx. 60% will return

- a. Will stay in the area, wont go too far
- b. Not really tied to community
- c. Looking for larger city environment
- d. South Carolina – fewer gun laws
- e. California – better job opportunities with animation and entertainment
- f. NYC – good place to be for educational background

At the end of the discussion period the students were asked what two things they would address in the Village if they were “King/Queen for a Day.” Responses from the students included the following:

Class 1:

- a. More business, shopping opportunities, employment opportunities for teens
- b. Recreation center
- c. Friendliness of police
- d. Less hotels
- e. More waterfront businesses
- f. Less bars
- g. Community services/opportunities for those in need
- h. Address drug issues
- i. Address vacant storefronts
- j. Build on tourism economy
- k. Local businesses – limited big commercial
- l. Preserve space between developments

Class 2:

- a. Large community center with local gym
- b. More hotels
- c. Better food delivery services and retail operations
- d. Improve building conditions and facades along Main Street
- e. Put “Town Square” on Main Street with park
- f. Add industry for jobs (wine, etc.)

Upon the completion of the group discussion, Mr. Steinmetz and Ms. Gaudioso thanked the classes for their thoughtful responses and for allowing use of their class time for the project. The students were informed that their comments would be included as part of the Comprehensive Plan update process, and were encouraged to look for more information on public input opportunities in the future.

Village of Penn Yan

Stakeholder Interviews Summary

Held on October 15th, 16th and 23rd, 2014

Stakeholder Interviewee List:

- Department of Public Works
- Finger Lakes Museum
- School District
- Recreation Department
- Zoning Board
- Historic Commission
- Keuka Lake Housing Council
- County Office for the Aging
- Friends of the Outlet Trail
- Mennonite Community
- Pennsylvania Yankee Theater Company
- Police Department
- Chamber of Commerce
- Finger Lakes Economic Development Center
- Downtown Merchants
- Industrial Operators
- Real Estate Agents
- Local Developer
- Soldiers & Sailors Hospital
- County Planning Office
- County Legislature (Dec 4th)
- County Social Services Office (Jan 5th)
- Yates Cultural & Recreational Resources (Dec 4th)
- Keuka College

Rather than provide exhaustive notes of each stakeholder interview, the following is a summary of the key topic areas addressed by the stakeholders that are most relevant to the 2015 Comprehensive Plan Update process. These topics include economic development, housing, the school district, Village services, Village Boards and Commissions, the zoning code, and parks and recreation, as well as comments provided by various County Offices, agencies, or interest groups.

I. Economic Development

a. Downtown

- Not enough office versus retail space; have also heard the opposite
- Limited hours of operation – very few businesses open late
- Parking challenge – owners are taking prime spots, consistent enforcement of time limits and other parking requirements would be beneficial
- Need double the amount of retailers downtown
- Focus hotel development in or near to central business district

b. Village Overall

- Lack of shopping basics – clothes, baby goods, shoes, electronics, sporting goods
- Target store would be great, could be draw for Village
- Consignment shop has seen huge success – often has lines of people outside
- When employees hit high growth mode the risk of flight from the area is greatest, providing more housing options can prevent this

Stakeholder Interviews Summary by Key Topic Area

c. Tourism

- i. Increasing and enhancing tourism efforts is the Chamber's number one goal
- ii. Finger Lakes Museum to have presence on Main Street – future partnership opportunities
- iii. Should capitalize on success of area attractions – Wineries attract 600K visitors per year, Windmill attracts 400K visitors per year, Finger Lakes Museum projected to have minimum 130K visitors per year
- iv. Out of town visitors are blown away by the character of the area
- v. Air travel is generally through Rochester

d. Industry

- i. Village is a good partner, cooperative
- ii. Low electricity cost is still a plus for operating in the Village
- iii. Aging water and sewer infrastructure is a concern that needs to be addressed
- iv. Need common mindset for economic development within the Village
- v. High school kids don't know what jobs are available here – opportunity for career days
- vi. Birkett Mills: Hire five employees, hope one stays – Education, work ethic, and drug use problems
- vii. Abtex: Employment is a challenge – hard to find skilled labor and professionals, advertise out of town for jobs
- viii. Coach Equipment: 30% of employees from Penn Yan, bulk of managers live out of town
- ix. Emmi Group: High turnover in staff, hard to find skilled people, high need for maintenance and mechanical repair people
- x. Birkett Mills, Abtex, Coach Equipment, and Emmi Group all looking to expand in the near future and plan to stay in the area

II. Housing

a. Existing Stock

- i. Lacking diversity in housing choice – need housing for seniors (75+ age group); young families and young professionals
- ii. Condition of housing stock is deteriorating – maintenance issues due to cost or age restrictions, especially along Liberty Street

b. Market

- i. Lack of middle-class, market-rate homes available (\$100 – 200K)
- ii. A high-end market exists, but to what extent is unclear – existing downtown building owners can more readily tap into this market, no building acquisition expenses to rehab upper floors into housing
- iii. Density will be key to making housing projects work within the Village
- iv. Most common question from buyers is “what are the taxes on this place” before asking about price
- v. White collar live outside County, blue collar live in Penn Yan

c. Affordability

- i. No housing is currently available for the \$30 to \$40K household income level
- ii. Housing Council is the only housing office in the area – Currently have 200 people on the waiting list

Stakeholder Interviews Summary by Key Topic Area

III. School District

a. Future Plans

- i. Remain a community partner, staying within the Village boundaries
- ii. Uncertain future of the middle school campus causes concern
- iii. Community Center with fitness facility is under construction

b. Student Population

- i. Enrollment is decreasing – Approximately 2,200 students in 1994, compared to about 1,500 in 2014
- ii. Obesity rate of 20% in the district
- iii. Poverty rate of 50% for middle school students; 60% for elementary school students

IV. Village Services

a. Department of Public Works

- i. Age of pipes is a concern – 80% are 70 to 100 years old, system in need of upgrading
- ii. Recent flooding uncovered issues with the storm system
- iii. Pricing structure of market rate power – residential users versus needs of industrial users is a concern
- iv. Village has a proactive maintenance schedule of utilities and infrastructure – no significant or pressing capacity issues at this time
- v. Village will relocate DPW barns from the marsh. This will make the current DPW site available for future reuse

b. Police Department

- i. Drugs, specifically heroin, is the number one issue in the Village – the 16 to 25 year old age range is where we see the most use
- ii. There has been a steady increase in “calls for service” – 4,500 in 2004; 6,000 in 2013; and reported 5,100 in October of 2014, so the number will likely go over last year’s
- iii. Expect to maintain size – 13 full-time officers, 6 part-time officers, always have at least two officers on patrol
- iv. County Sheriff’s Office staff numbers are down, so that has put more pressure on Village officers

V. Village Boards & Commissions

a. Zoning Board of Appeals

- i. Most variances are the result of having to accommodate older homes and smaller village lots with code requirements
- ii. Signage variances are a huge issue – hodgepodge of signage throughout downtown especially
- iii. Currently trying to integrate Comprehensive Plan into decision-making, and increasing education and communication efforts within and between boards
- iv. Deny more residential conversions, preserve housing stock

Stakeholder Interviews Summary by Key Topic Area

- b. Historic Commission
 - i. Lack of awareness and education within the community of the existence of a Historic District – boundaries, benefits, property status, requirements, etc.)
 - ii. Enforcement is in a gray area – “selective enforcement,” penalties, property owners not wanting to be held to higher standards when deteriorating properties aren’t being penalized
 - iii. The Historic Preservation District guidebook and property owner information packets are a great tool, but currently underutilized
 - c. Zoning Code
 - i. “Need to look at what’s working and what isn’t”
 - ii. Consideration of enhancing standards for signage, gateways, transitional commercial zones, etc.
 - iii. Lake Street and Liberty Street need to be addressed
 - iv. Development standards – improved parking requirements (number of spaces, screening/buffering, horse and buggy tie-ups, etc.)
 - v. “Village has the opportunity to set the standard”
- VI. Parks and Recreation
- a. Facilities
 - i. Outlet Trail – big asset, potential for County to take expansion/maintenance outside of the Village
 - ii. DPW barn site relocation – opportunities for a trail around the marsh, provide more public access
 - iii. Greenway trail system – connect parkland along the outlet and creeks, as well as extending the trails to the Lake
 - iv. Condition and maintenance of the parks and playgrounds is a concern
 - v. Increase boater access into Village
 - b. Programming
 - i. No Village recreation or education programs – currently run by school, library, County, etc.
 - ii. Lack of senior programming for 55 to 75 age group – physical activity, continuing education, etc.
 - iii. There is a disconnect between current recreational/educational programming organizations – no clear leader. Village can work to potentially fill this role.
 - iv. Community support of the school sports teams is very strong in the Village
 - v. Family outings and cultural offerings are limited within the Village
- VII. County Offices
- a. Office of the Aging
 - i. Seniors that are seeking services from the County are mostly those 75+
 - ii. There is a lack of affordable housing and senior housing options for those looking to downsize or age-in-place
 - iii. Transportation is the number one issue for seniors in need of care – limited public transit, having to go to Geneva for specialty care

Stakeholder Interviews Summary by Key Topic Area

b. Planning Department

- i. There is potential for more coordination and communication between the local Town and Village Planning Boards – County can play a regional planning role
- ii. Had to return \$250,000 to NYS because of the lack of housing options available (inequality, housing conditions, and affordability all a factor)
- iii. Use overlays in transitional areas beyond Village boundaries to work with other municipalities to improve gateways
- iv. County Planning Department can hold educational sessions/discussions with all municipality Planning and Zoning Boards.

c. County Legislature

- i. It is important to the County to have a vibrant and friendly downtown – There is a growing spirit of cooperation and shared interest
- ii. There are three years left on bonds for the County offices and courthouse
- iii. Working with Schuyler County on Certified Local Government project to consider consolidation of resources
- iv. County used to put money into Village recreation fund, but ceased due to lack of updates or invoices
- v. Potential for coordination with all municipalities for coordinated recreation plan

d. Department of Social Services

- i. Most widely used services are Medicaid and food stamps with over 10% on each, but less than 1% enrolled in full social assistance programs.
- ii. Village provides good community resources for those in need – Food Pantry, Living Well program, etc.
- iii. Don't have enough affordable rental housing in the area, sometimes have to place homeless out of the County.
- iv. Need better public transportation access to groceries, pharmacies, and work.
- v. Yates County has one of lowest unemployment rates in NYS, but this does not account for the large number of underemployed individuals – not enough “living wage” jobs, jobs with health insurance.
- vi. Could benefit from Landlord Association/group to assist owners/renters with leases and owner/tenant rights.

VIII. Other Agencies and Interest Groups

a. Soldiers and Sailors Hospital

- i. New focus on “population health” – changing how care is delivered to reduce need for inpatient care
- ii. Working with community groups and organizations to teach people preventative care and home care, managing their personal health
- iii. Top issues in the County are cardiovascular disease, diabetes, smoking, and obesity
- iv. Lack of public transit, especially outside of the Village, is an issue for those in need of specialty care/services

Stakeholder Interviews Summary by Key Topic Area

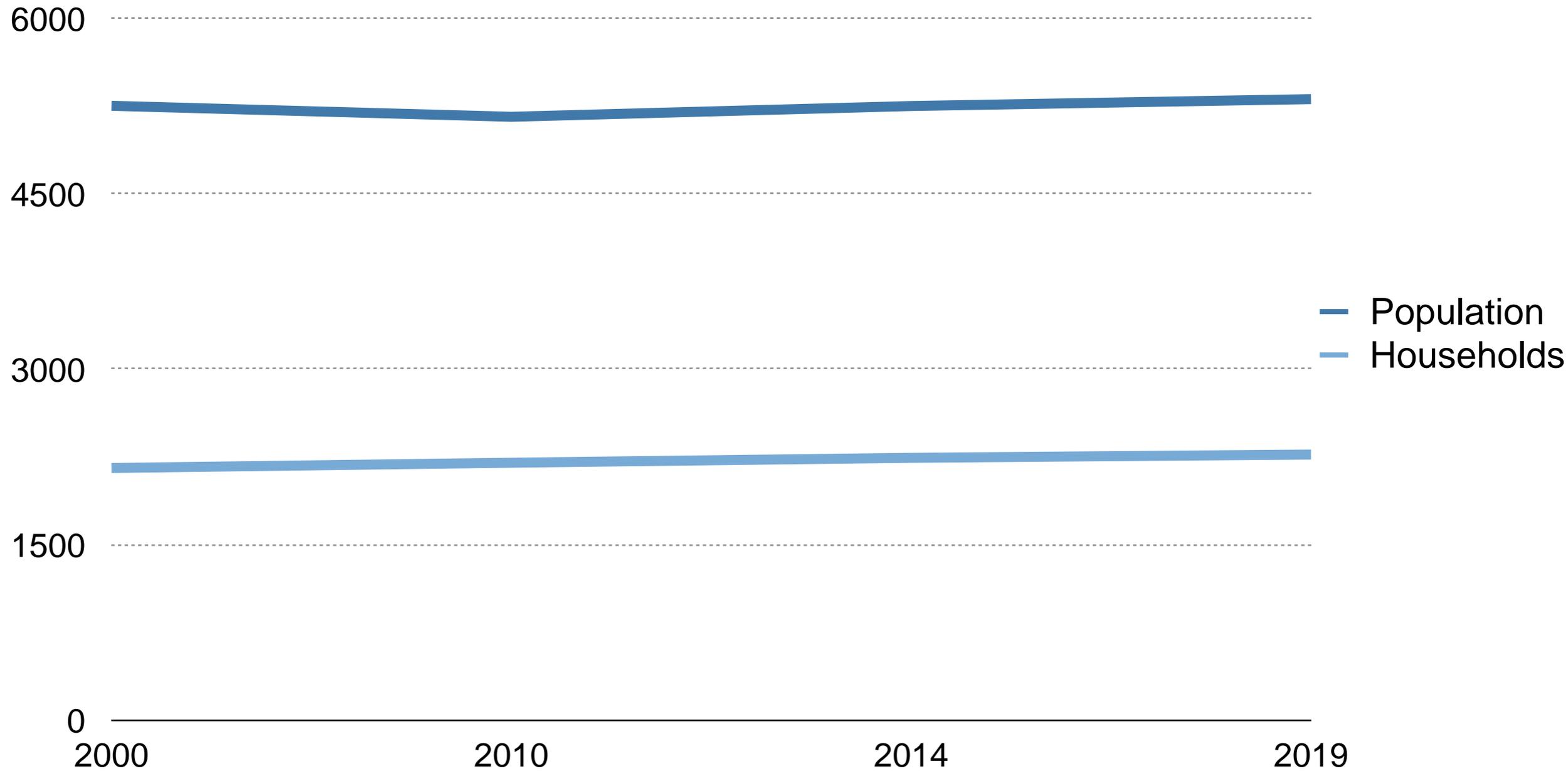
- b. Mennonite Community
 - i. In need of more legal/public horse and buggy tie-ups – There is also an opportunity to provide manure shovels/buckets for its reuse as compost
 - ii. Need more north-south connections in the area
 - iii. Would benefit from increased shoulders on roadways to accommodate bicycles and buggies
- c. Pennsylvania Yankee Theater Company
 - i. Currently have architectural plans in progress - \$4 to 5 million dollar project, will start with exterior improvements to get people excited about the project's potential
 - ii. Will have 500 to 600 seat capacity and plan to include a restaurant facility next door – will be ADA compliant
 - iii. Desire to make it multi-use space for the community – rentable event space, performing arts theater, music hall, dance space, teaching and classroom opportunities, etc.
 - iv. Unofficial partnership with Keuka College – will rent the space for students to use, college sees it as a great way to enhance theater/arts program without major investment
- d. Yates Cultural and Recreational Resources (YCRR)
 - i. Opened in 2009 – have about 300 members; very big with older crowd (physical and social activity)
 - ii. In the process of expanding to facility that is two times current size, will keep existing building for community programming opportunities (training, after school programming, senior programming, literacy initiative)
 - iii. 14 acres to back facility site – Use fields for local sports practice, plan to include gym or pool in later phasing (if money becomes available)
 - iv. Been trying to rebuild confidence after previous plan fell through
 - v. Would like support from Village – potential for partnerships and coordinated efforts
- e. Keuka College
 - i. Approximately 1,000 students of which 85% live on campus
 - ii. Looking to grow campus population to approximately 1,750 students by 2023
 - iii. Keuka College is the largest employer in Yates County
 - iv. Non-vehicular travel is a challenge for students – approximately 80% of American students have their own cars
 - v. High share of Chinese students who may or may not have access to transportation
 - vi. The fields and playgrounds at the College are underutilized
 - vii. In the next few years the College will be developing the Keuka Commons, which include a bookstore, café, and health center that will be open to the public.
 - viii. The Keuka College beach is public – opportunity for direct waterway connections to the Village?
 - ix. Faculty has a difficult time finding middle-income housing as well as employment opportunities for their spouse
 - x. The employees have a “commuter” mentality
 - xi. ENACTUS program sets up student business groups with local, Village businesses for assistance with business experience
 - xii. Recreational programming is lacking in the County

Village of Penn Yan 2015 Comprehensive Masterplan Update

Background Economic Analysis
December 2014

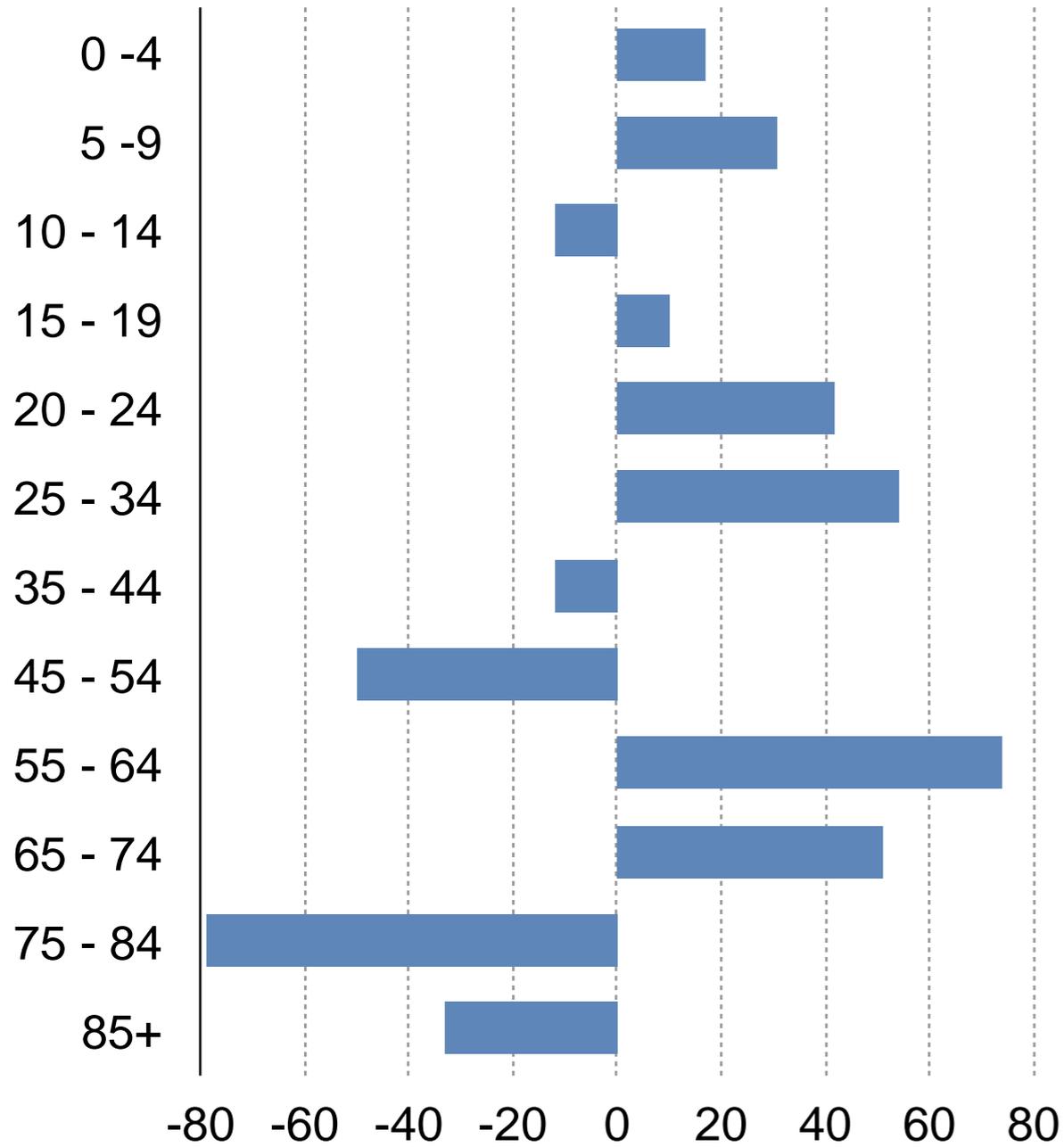
Village of Penn Yan

Population and Household Trends

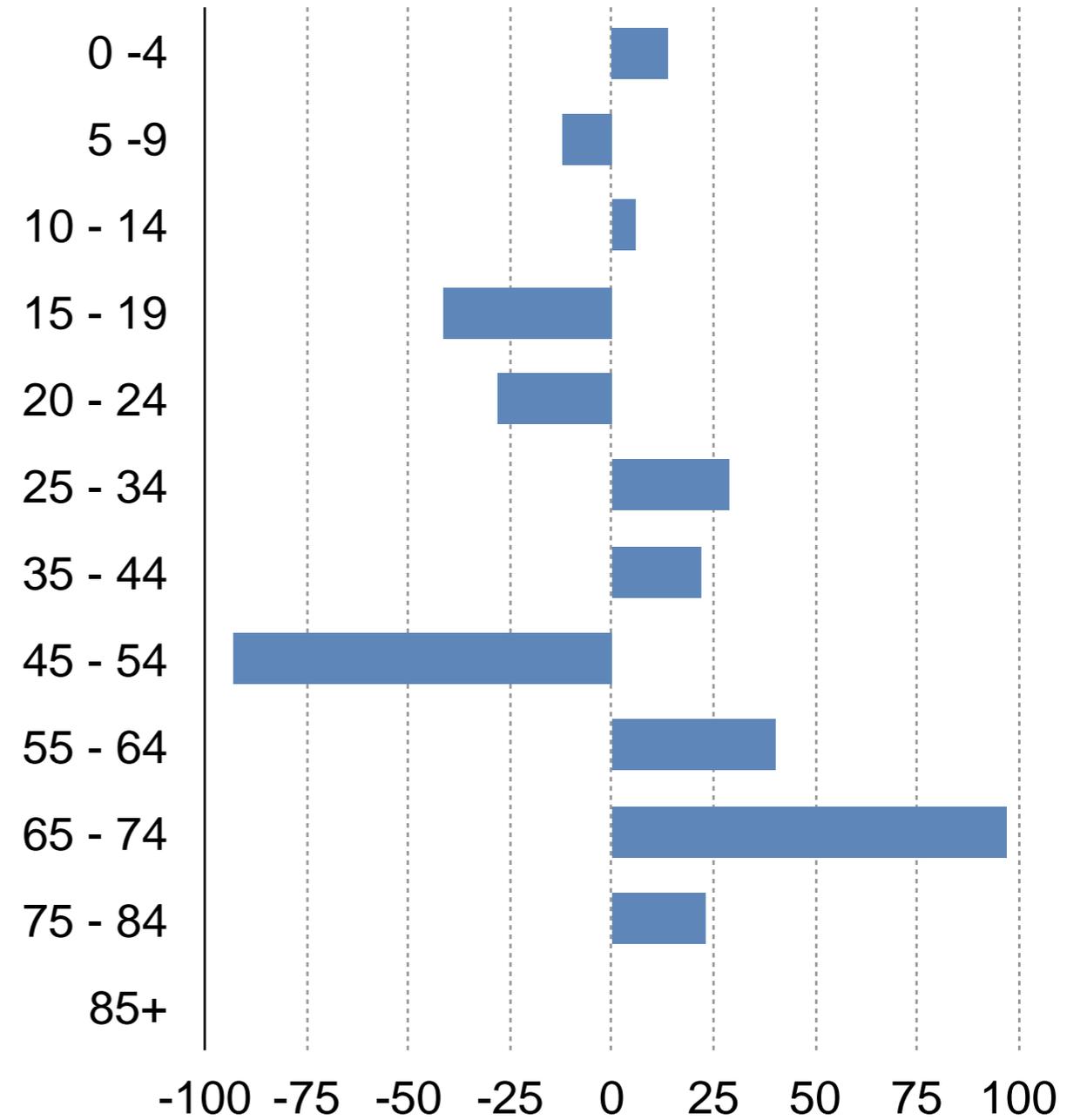


Village of Penn Yan

Change in Age 2010-2014

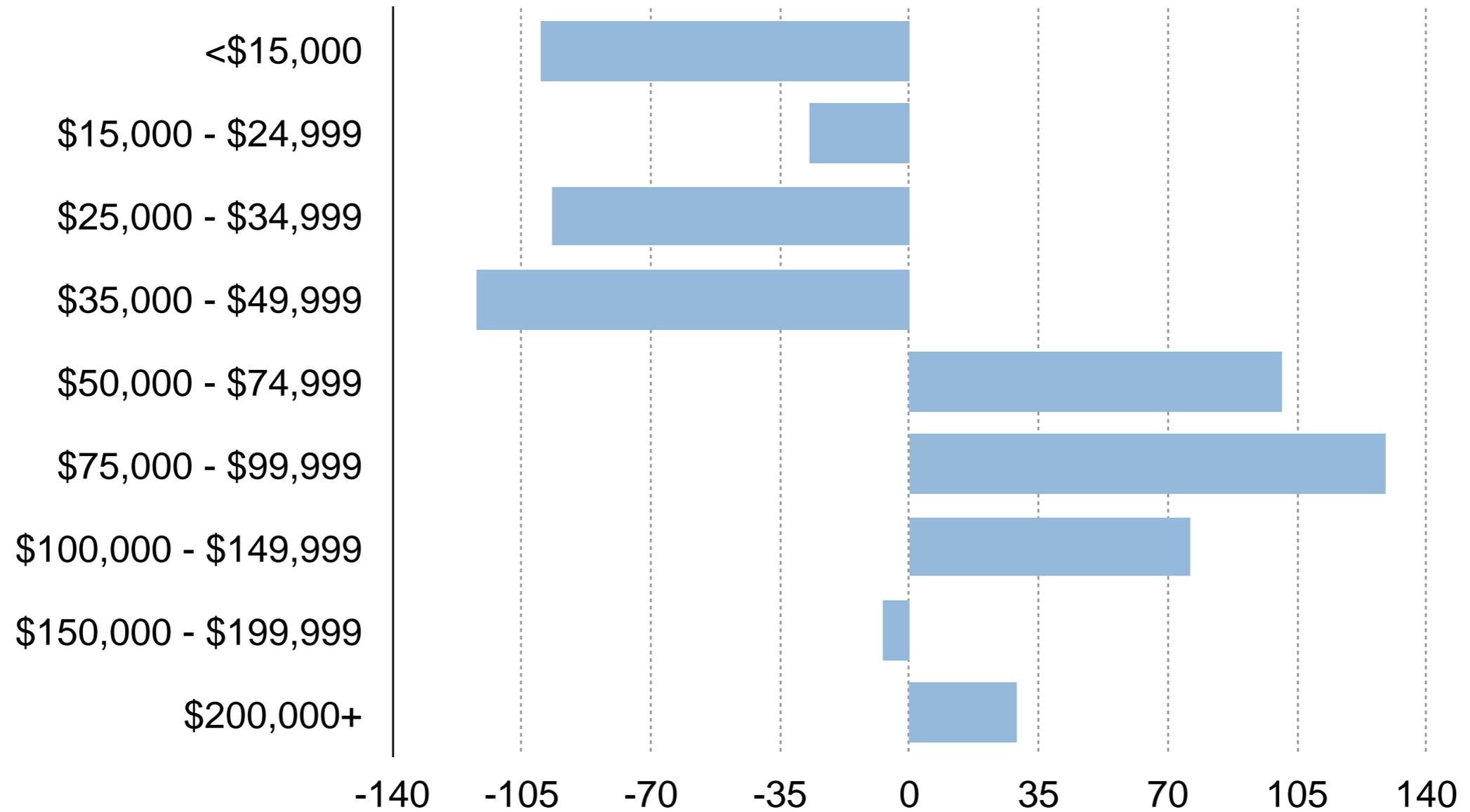


Projected Change in Age 2014-2019



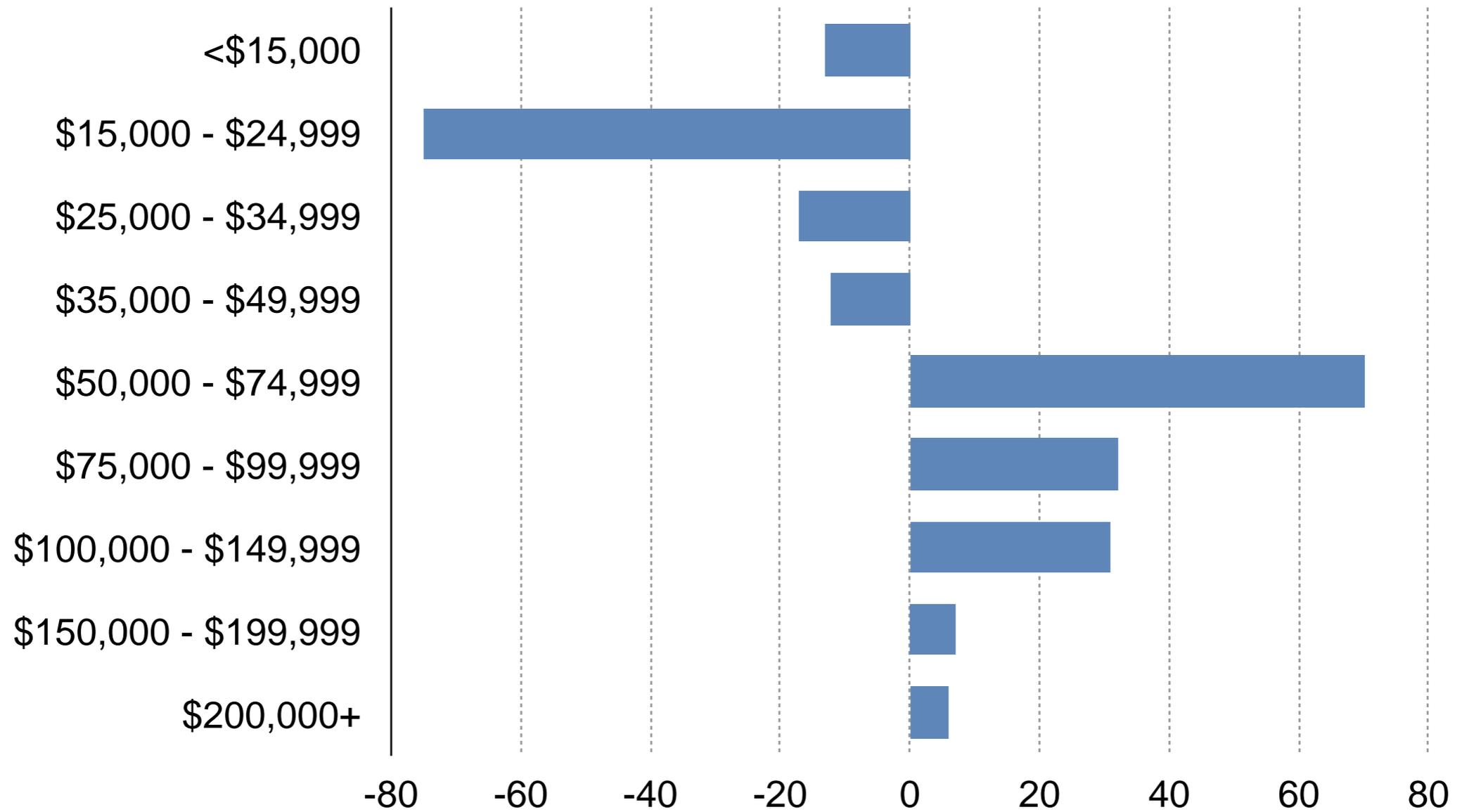
Village of Penn Yan

Change in Households by Income 1999-2012

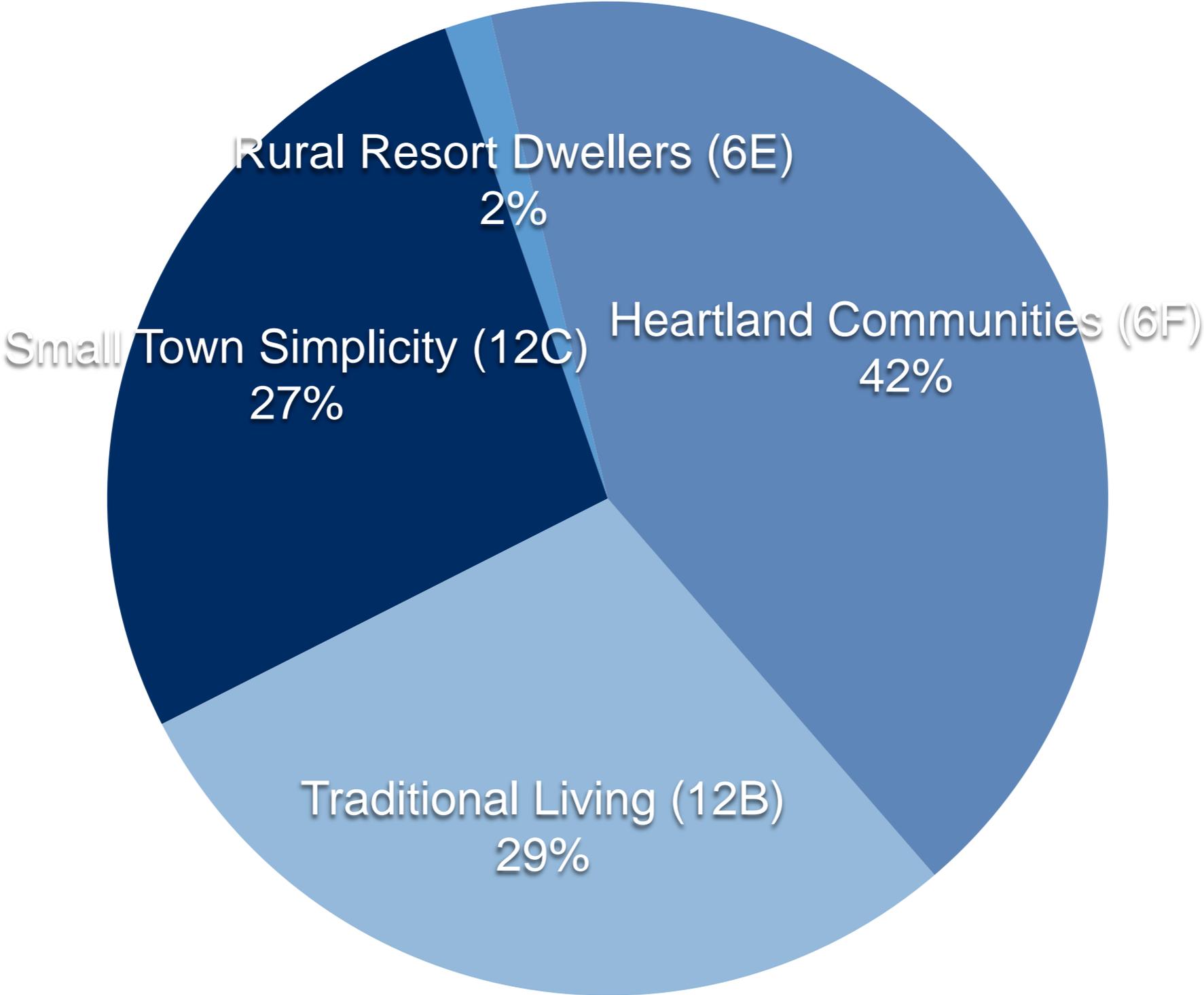


Village of Penn Yan

Projected Change in Households by Income 2014-2019

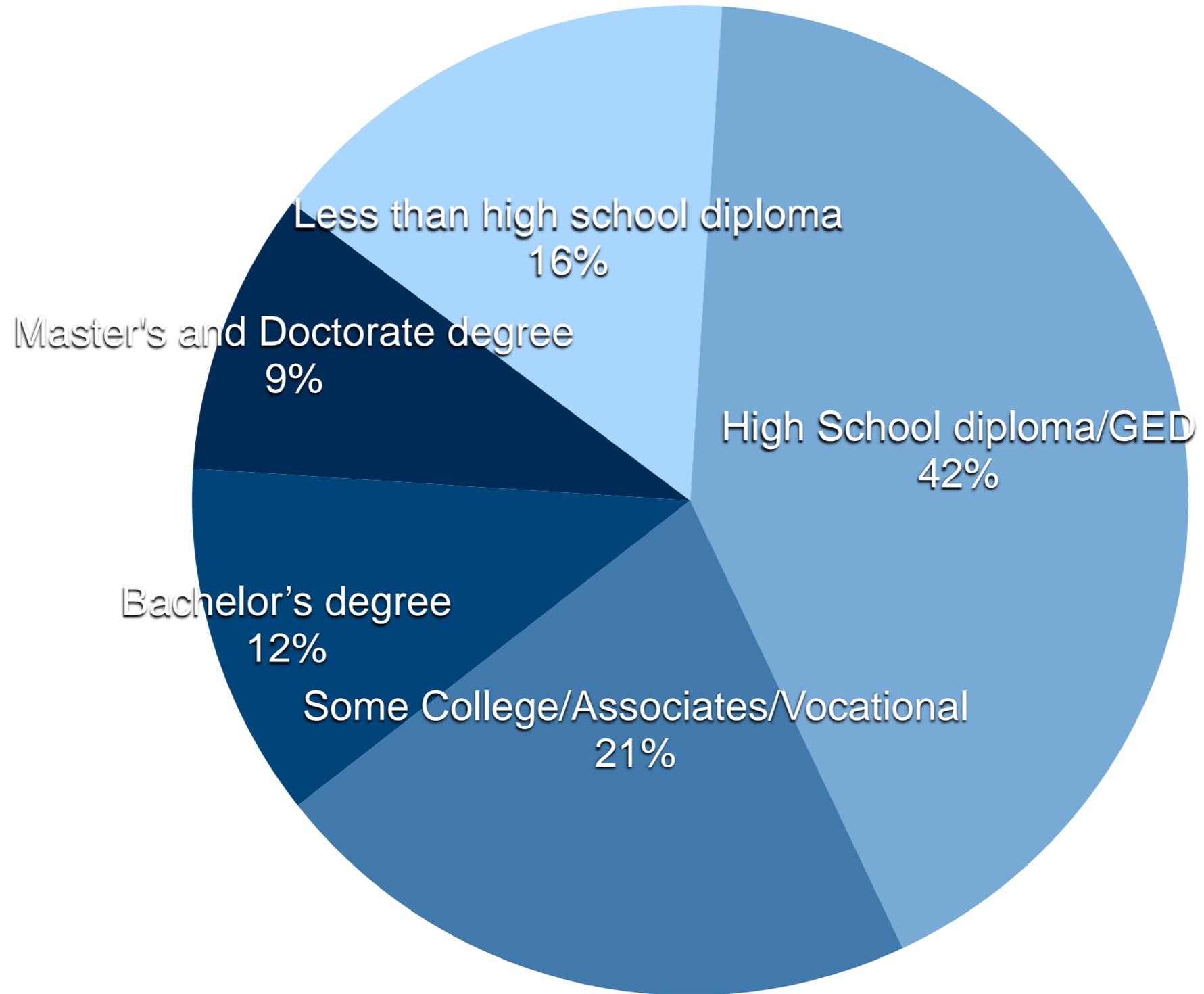


Village of Penn Yan Lifestyle Segments



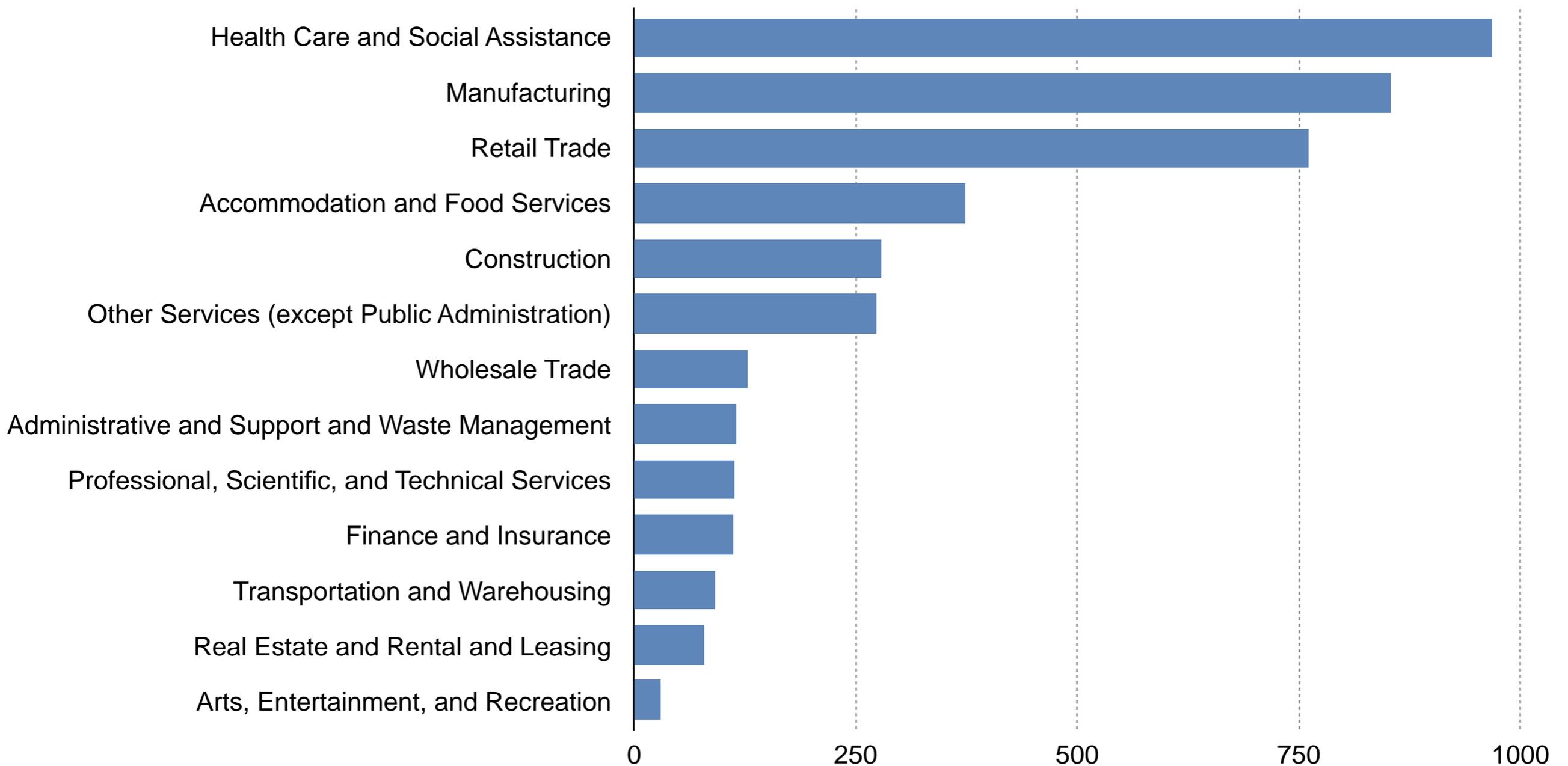
Village of Penn Yan

Population Age 25+ Years by Educational Attainment



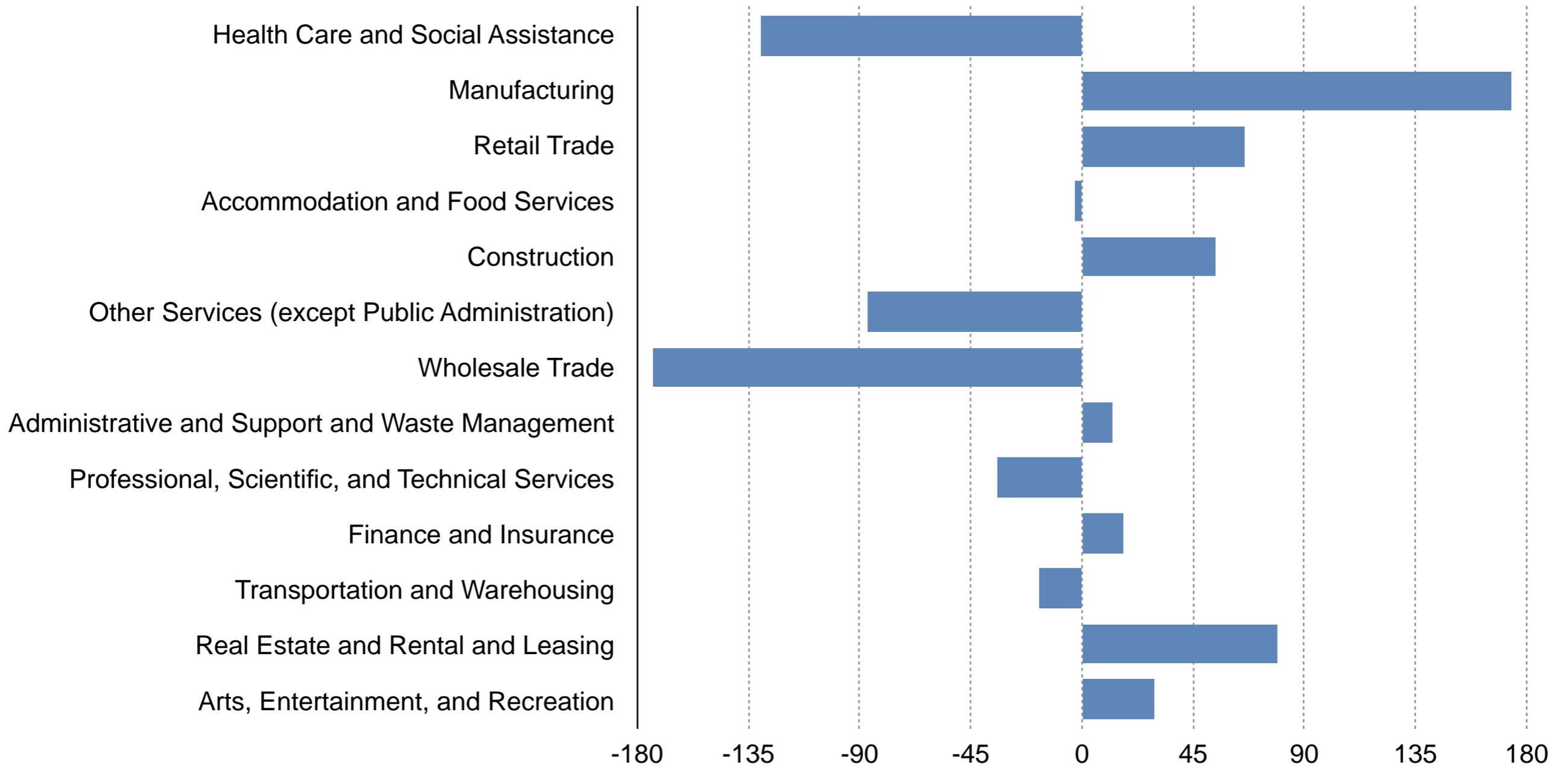
Yates County Employment Trends

2012 Yates County Employment by Industry

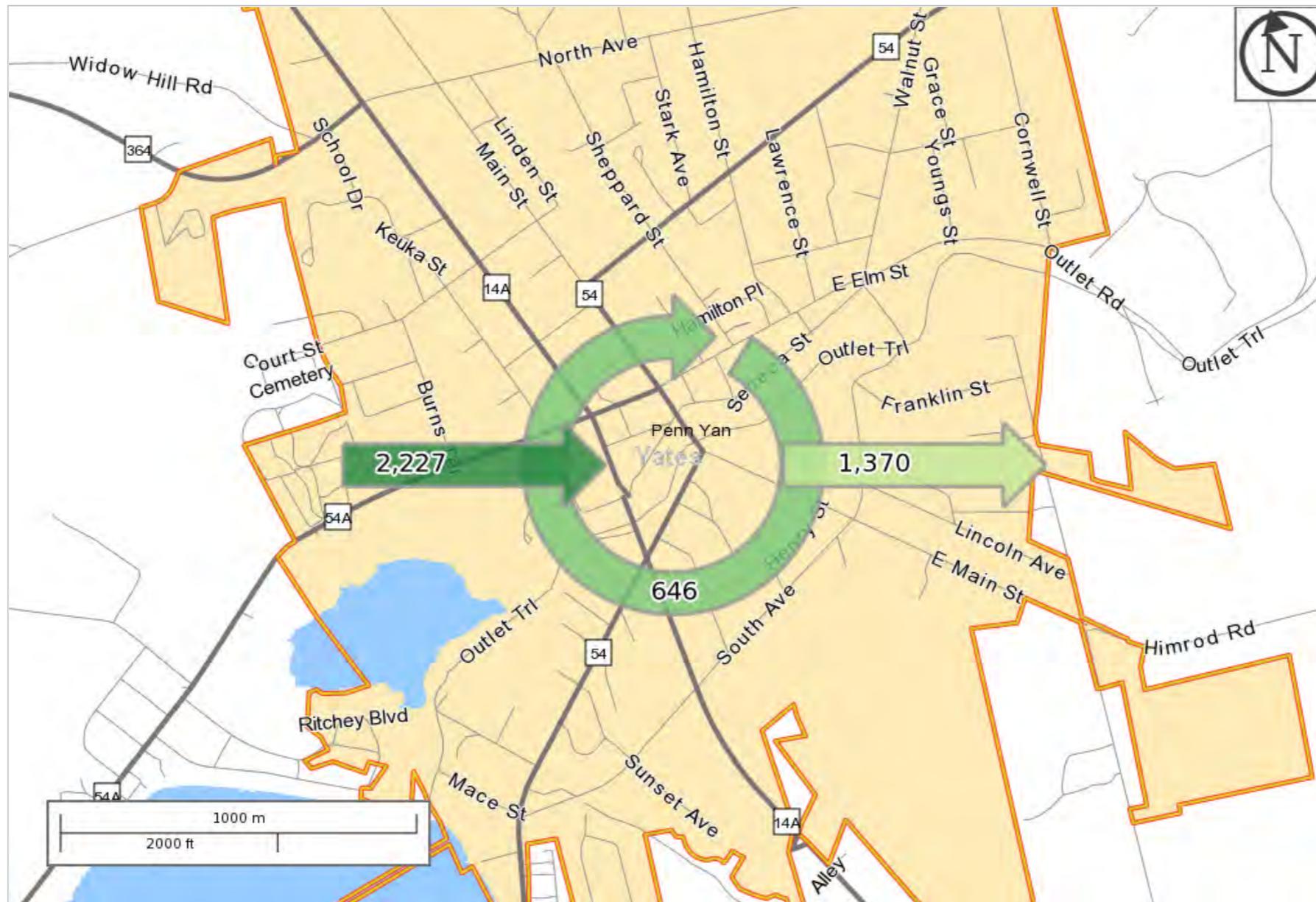


Yates County Employment Trends

Yates County Change in Employment by Industry 2002-2012



Inflow/Outflow Counts of All Jobs for Penn Yan, New York in 2002



Map Legend

Selection Areas

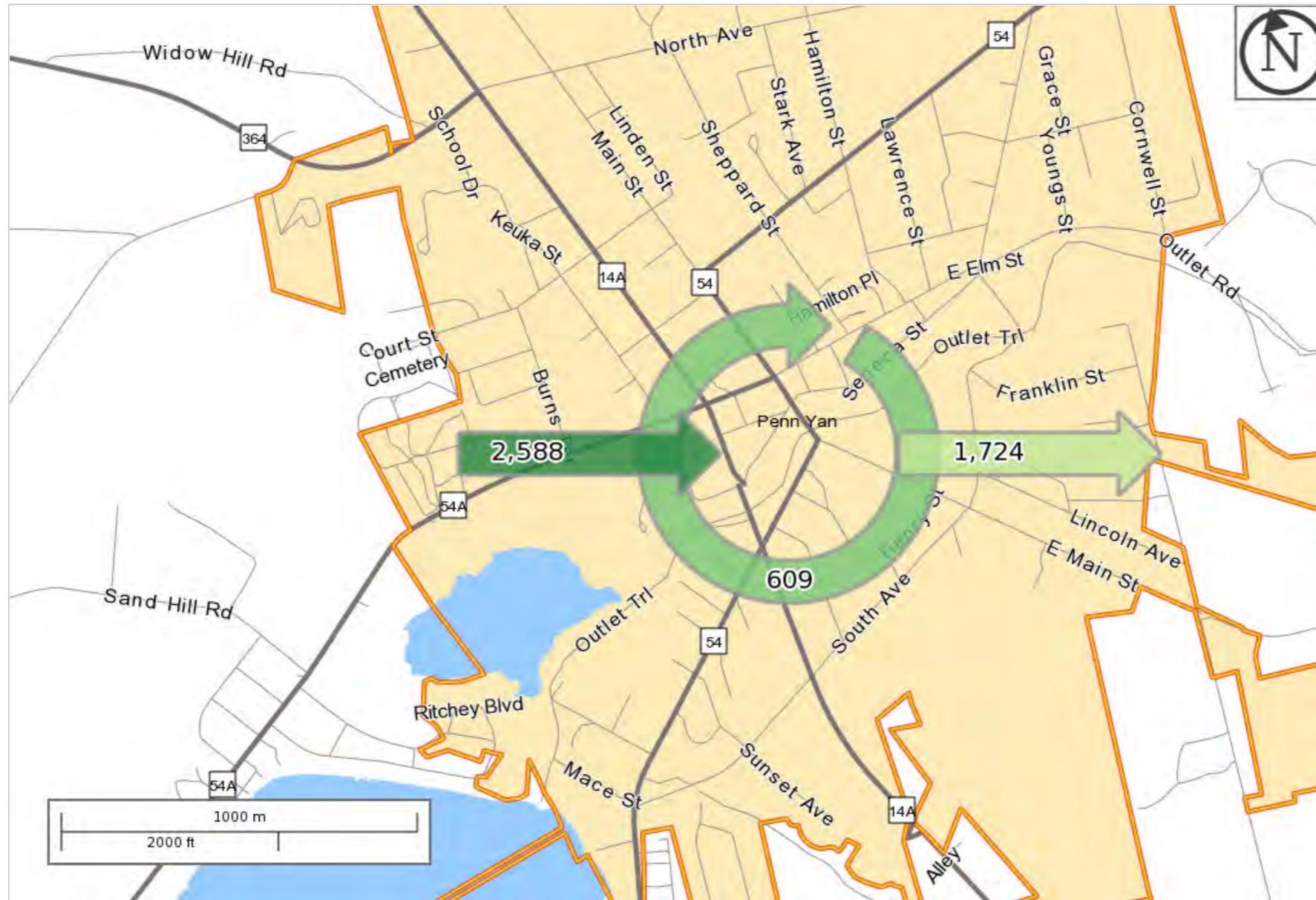
- Analysis Selection

Inflow/Outflow

- Employed and Live in Selection Area
 - Employed in Selection Area, Live Outside
 - Live in Selection Area, Employed Outside
- Note: Overlay arrows do not indicate directionality of worker flow between home and employment locations.



Inflow/Outflow Counts of All Jobs for Penn Yan, New York in 2011



Map Legend

Selection Areas

Analysis Selection

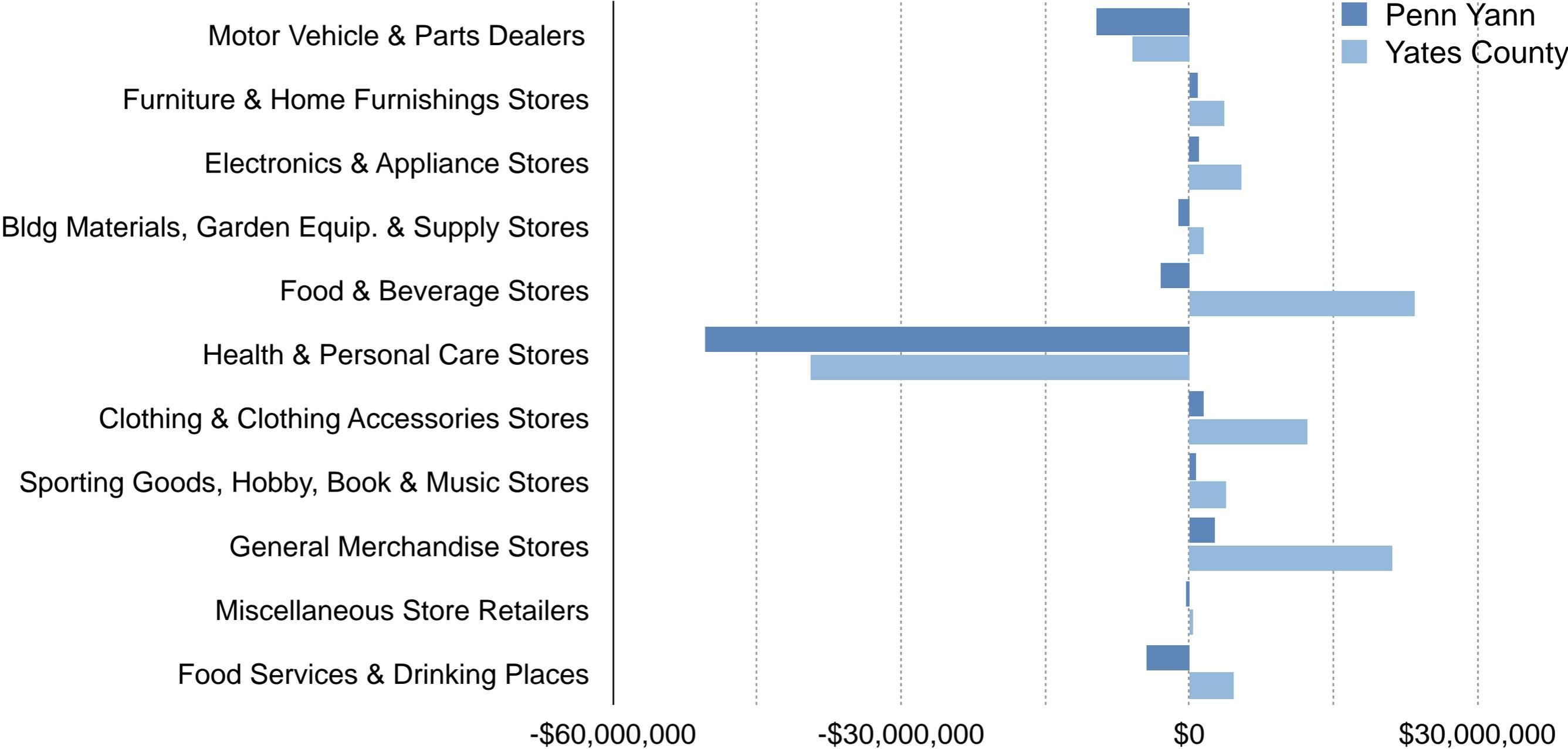
Inflow/Outflow

- Employed and Live in Selection Area
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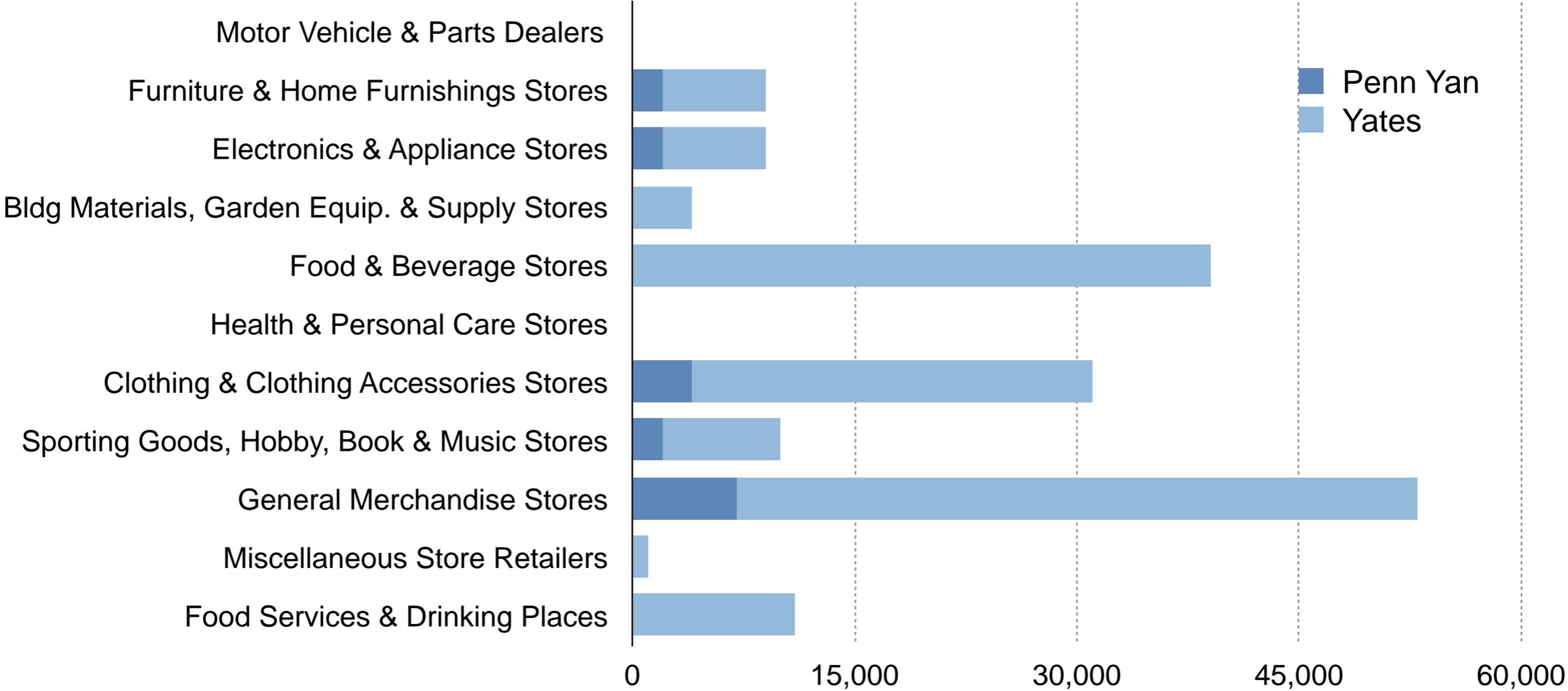
Penn Yan & Yates County Retail

Retail Spending vs Sales



Penn Yan & Yates County Retail

Retail Gap (Est. Square Feet)



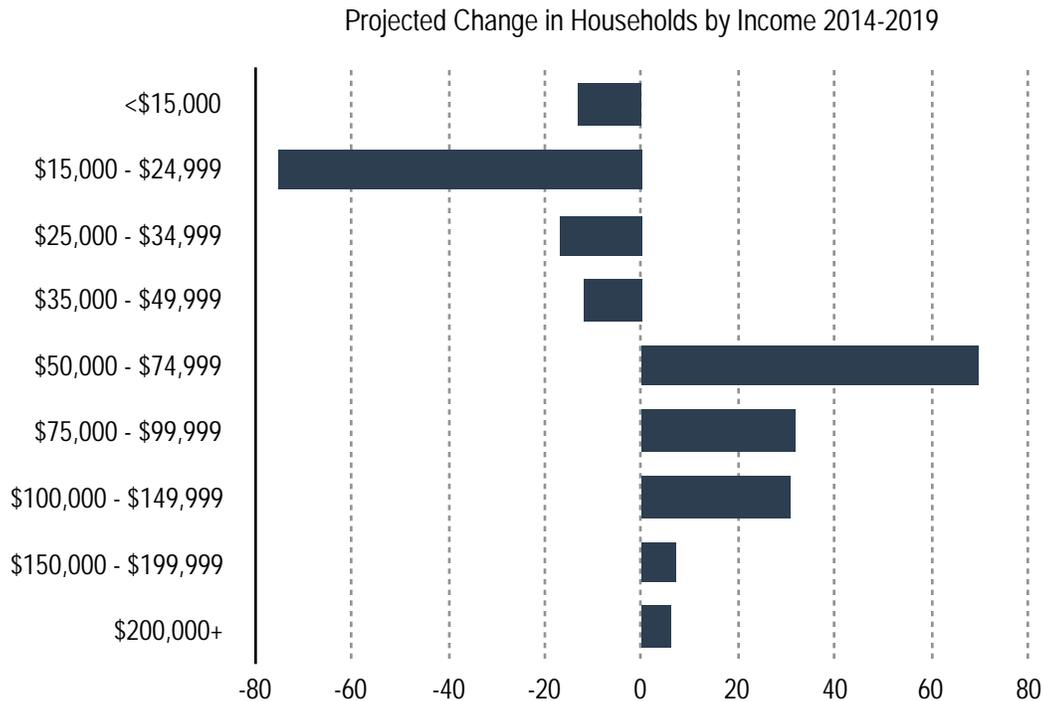
source:ESRI BAO & Urban Advisors Ltd

January 31, 2016

Penn Yan

Memorandum: Development Strategy

Housing



The projected change in households by income suggested that there will be a net increase of households with incomes over \$50,000 and a net decrease in households below that level. The existing lifestyle segments that most closely match this profile are Rural Resort Dwellers and Prairie Living. Other lifestyle profiles that match the income and geography profile are Great Outdoors, Salt of the Earth, and Green Acres; all of who tend to live in single family homes valued between \$150,00 and \$200,000.

Translating the net growth income categories into unit values suggests there will be a demand for units priced at \$125,000 and up. This matches what we heard in stakeholder interviews: that there is a market for quality, working class housing in the \$100,000 to \$200,000 range, but there is very little supply on the market. Reviewing the Assessor's data confirms that 70% of single family houses are valued under \$100,000, with 8% of single family houses valued below \$50,000. As with many small towns, Penn Yan is missing opportunities for middle income households.

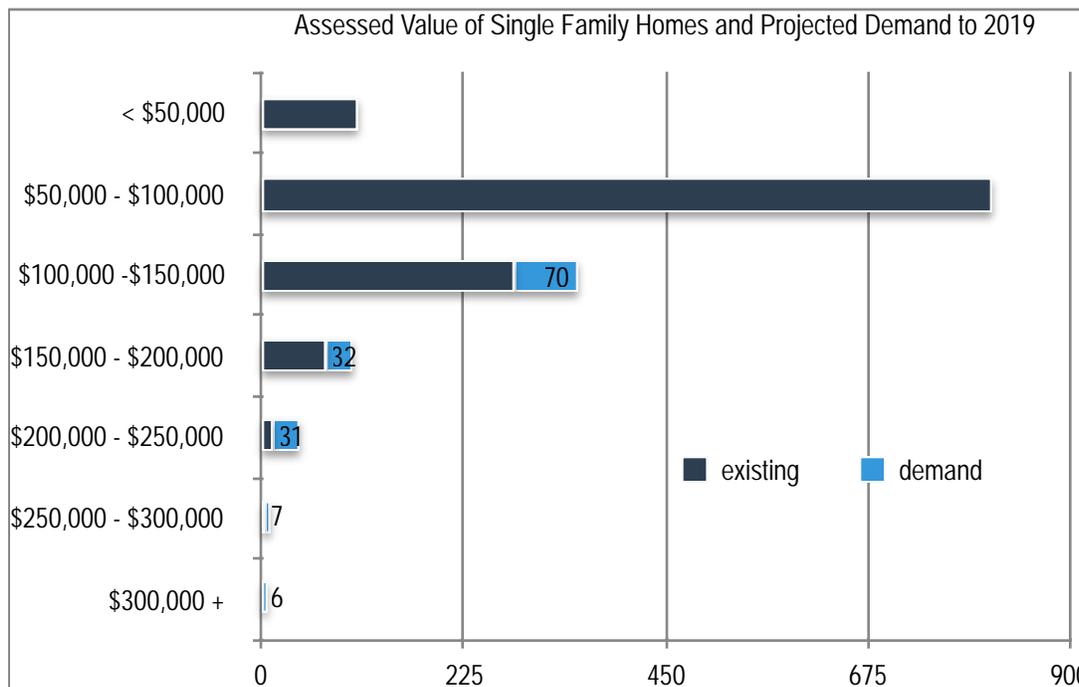
Besides single family houses, this projection does not reflect the demonstrated market for waterfront or second story units. These are important new segments that are currently not available in the existing marketplace, and will have a positive impact in providing housing for a diversity of new income and lifestyle segments.

5 Year Housing Program

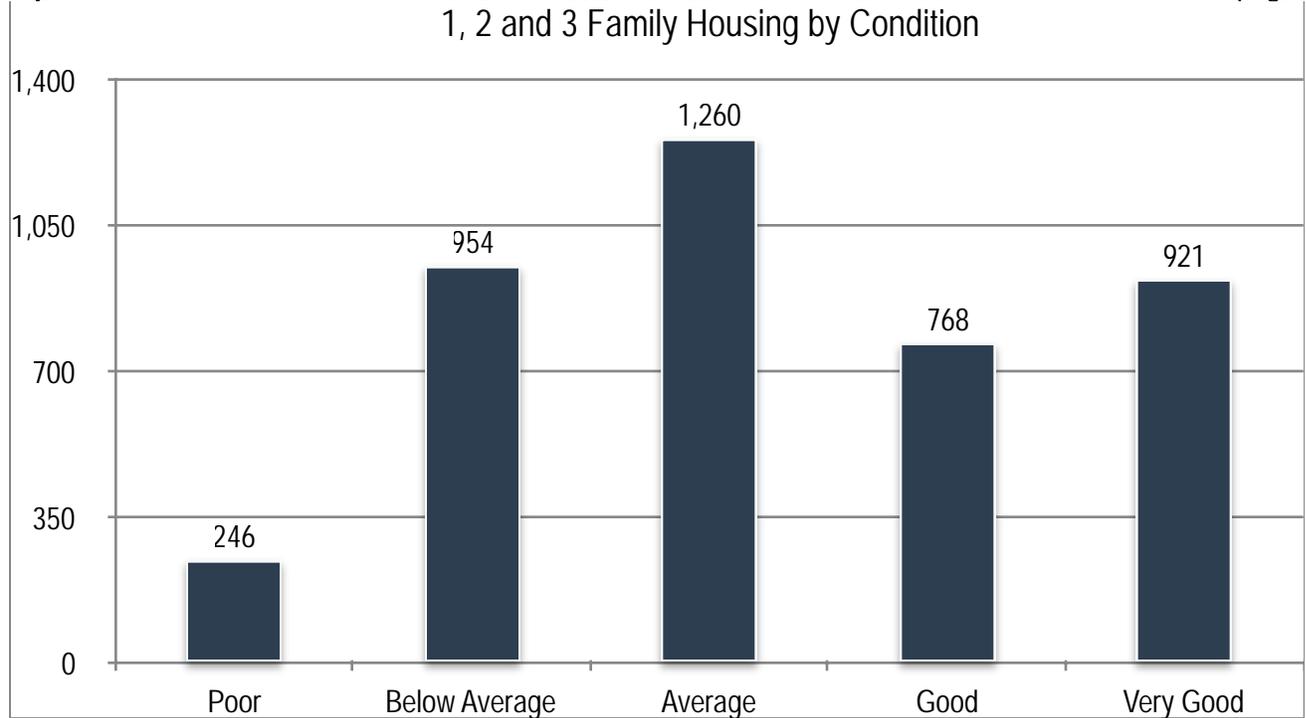
| Average Value | Units |
|-----------------------|------------|
| \$100,000 - \$150,000 | 70 |
| \$150,000 - \$200,000 | 32 |
| \$200,000- \$250,000 | 31 |
| \$250,000 - \$300,000 | 7 |
| \$300,000 + | 6 |
| Total | 146 |

Tax assessor data records the assessed value and square footage of houses. The assessed building values and recorded building square feet indicated the assessed value of houses per square foot. When compared to a new building cost of \$70 per square foot (reported by Buildingjournal.com for a 1,500 square foot home) this suggested the relative condition of the housing stock. 83% of the houses assessed at less than \$50,000 were also “below average” or “poor”. *

* The value of housing is based not only on the condition of the house but location and demand. The lot value has been left out to compare only building values, although these vary with market conditions. The relative value between houses should suggest the relative condition and maintenance of the house.



In the transition from a net loss of lower incomes to a net gain of middle incomes, housing preferences and expectations of new residents might not match the existing conditions. The new households in middle income categories are likely to prefer better maintained and newer options than what the majority of the market has to offer. For single family and duplex houses, this means there may be opportunities to renovate dilapidated and obsolete housing for new users. Also, the Assessor’s data suggests that there are 120 vacant lots that could accommodate new houses.



The net change in middle and upper incomes over the five year projection is about 150 households. This can be accommodated through a combination of infill strategies: building on vacant lots, renovating houses and second story apartments, and building new condominiums.

Besides masterplanned opportunities along the water, the village could seek control of vacant and condemnable property that could be sold to developers or local builders for renovation. This would add value to underutilized assets and increase the taxable assessment of land in the village. In other places Community Development Corporations are a useful not for profit partner in assisting with neighborhood housing renovations, maintenance and homeowner training.

It is important for a Village to keep its property in good condition and the cost of dilapidated and underutilized

Tax Impact of Units in "Poor" Condition

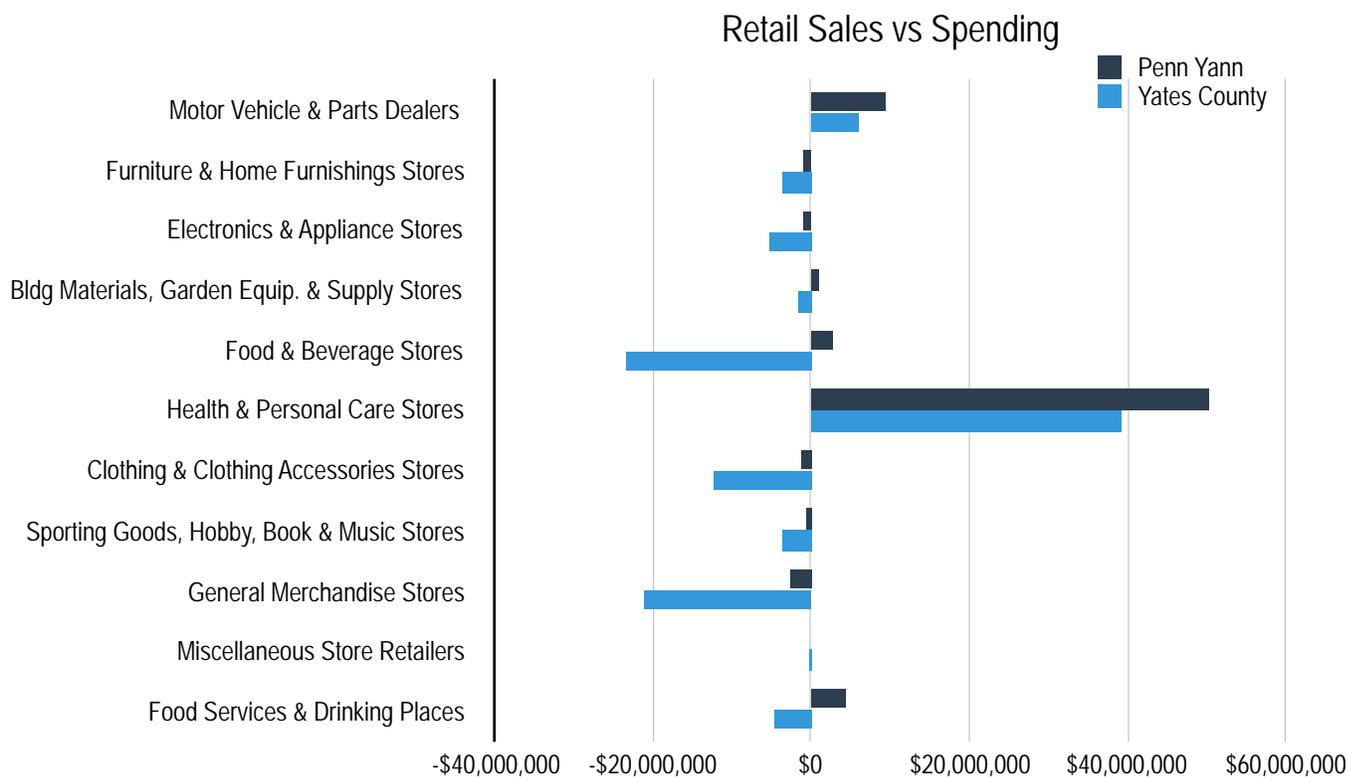
| | Single Family | 2 Family | Total | Tax |
|--------------------|---------------|-------------|--------------|-----------|
| Current Assessment | \$2,890,200 | \$696,100 | \$3,586,300 | \$55,946 |
| Improved Value | \$9,221,240 | \$2,502,960 | \$11,724,200 | \$182,898 |
| Net Value | \$6,331,040 | \$1,806,860 | \$8,137,900 | \$126,951 |
| 30% | | | \$2,441,370 | \$38,085 |

property can be extensive. While most of Penn Yan's housing stock is in at least "average" condition, 5% is "Poor" and 23% is "Below Average". If the "Poor" properties saw reinvestment and maintenance they would add \$8,000,000 to the value of Penn Yan's housing stock. This would translate to \$127,000 annually in additional tax

collected. Since there is a limited demand for new renovated housing, setting a goal of 75 units (30% of the “Poor” condition units, and 50% of housing demand) would have a tax benefit of \$38,000 annually for the Village.

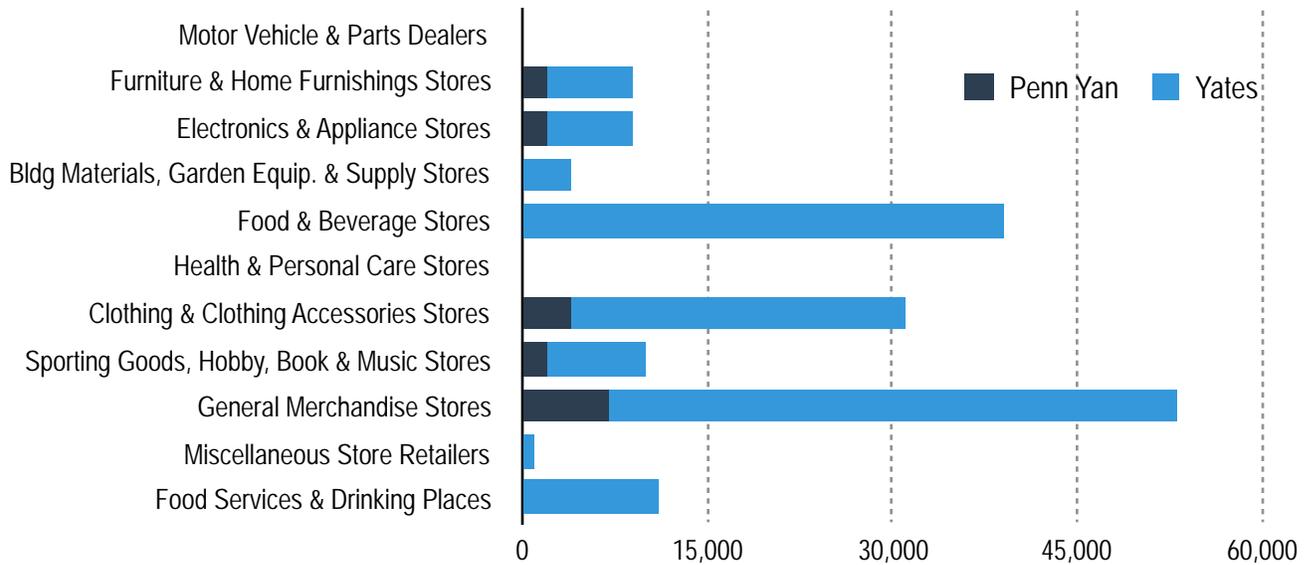
Retail

An analysis of retail sales and spending in Penn Yan and Yates County indicates how much “leakage” or “surplus” the areas experience. How much do residents of Penn Yan spend in Penn Yan and how much do they spend elsewhere? How much of the County’s spending goes to Penn Yan? This is answered by retail category in the following chart. Both Penn Yan and Yates County attract sales from other places in Health Care Stores (pharmacies) and Motor Vehicle & Parts Dealers. Yates County residents spend over \$20,000,000 outside of Yates County on Food and Beverage Stores (groceries) and General Merchandise Stores. This means that there is a Retail Gap in many categories, described in the following chart. Penn Yan, meanwhile, shows only slight leakage of spending to other places and captures a small amount of Food Service and Food Store sales from other places, as expected for a Village that serves the commercial needs of the County.



While there is only a slight leakage of spending from the Village of Penn Yan to other places, there are larger categories of leakage out of Yates County. As shown in the Retail Program, Penn Yan accounts for 68% of retail sales in the County. If Penn Yan were able to recapture the County leakage by its relative percent of sales within the County, it could support an additional 80,000 square feet of retail uses. Some of the leakage may be from County residents who live closer to other places outside the County, like Geneva, so recapturing the entirety of this leakage may not be a realistic goal. Still, this demonstrates the depth of market in the County to support a small amount of new retail uses. This matches the perspectives we heard from the community and stakeholders, that local residents lack opportunities to shop locally for clothing and general merchandise. This analysis suggests that County spending patterns could support up to 50,000 square feet of new clothing and general merchandise space in Penn Yan.

Retail Gap (Est. Square Feet)



While the new supportable space projection is still relatively small in the context of major developers (Wegman's is now only building stores larger than 100,000 square feet) it could be a significant impact on the Village which, according to Assessor data, currently only has about 270,000 square feet of retail uses. Consequently, the location and type of development should be carefully planned and considered in accordance with the Vision Plan. This new development could be an important tool in implementing the plan and could be leveraged to extend Main Street services through Water Street or on Lake Street.

Retail Program

| | Yates Sales | Penn Yan Sales | Penn Yan % of Yates | Yates Leakage | Penn Yan Capture | New Space in Penn Yan (SF) |
|---|----------------------|---------------------|---------------------|---------------------|---------------------|----------------------------|
| Furniture & Home Furnishings Stores | \$1,327,147 | \$99,600 | 8% | \$3,570,019 | \$267,924 | 1,000 |
| Electronics & Appliance Stores | \$1,361,523 | \$284,333 | 21% | \$5,489,642 | \$1,146,427 | 2,000 |
| Bldg Materials, Garden Equip. & Supply Stores | \$6,113,173 | \$2,379,289 | 39% | \$1,530,785 | \$595,792 | 2,000 |
| Food & Beverage Stores | \$19,951,567 | \$10,782,599 | 54% | \$23,438,306 | \$12,666,968 | 21,000 |
| Health & Personal Care Stores | \$58,677,281 | \$53,794,664 | 92% | \$0 | \$0 | 0 |
| Clothing & Clothing Accessories Stores | \$2,064,257 | \$1,338,545 | 65% | \$12,284,067 | \$7,965,470 | 20,000 |
| Sporting Goods, Hobby, Book & Music Stores | \$1,129,236 | \$241,979 | 21% | \$3,824,103 | \$819,450 | 2,000 |
| General Merchandise Stores | \$3,194,119 | \$1,801,995 | 56% | \$21,187,372 | \$11,953,073 | 30,000 |
| Miscellaneous Store Retailers | \$7,019,103 | \$1,549,007 | 22% | \$435,457 | \$96,099 | 0 |
| Food Services & Drinking Places | \$17,231,058 | \$8,463,301 | 49% | \$4,532,580 | \$2,226,247 | 5,000 |
| Total Retail | \$118,068,464 | \$80,735,312 | 68% | \$76,292,331 | \$37,737,449 | 83,000 |

Conclusions

Reposition Housing Stock for New Residents

- Support waterfront development according to the Vision Plan
- Support second story apartments on Main Street
- Evaluate vacant lots for potential development
- Establish a housing improvement program to return dilapidated units to service
 - Assemble underutilized property for renovation
- Support a Community Development Corporation to assist with maintenance and reinvestment

Establish the Village as the Commercial Center of the County

- Evaluate the potential to recapture sales from County residents
 - General Merchandise
 - Apparel
 - Food Service
 - Food Stores
- Plan for additional retail growth in accordance with the principals of the Vision Plan
 - extend Main Street uses to Water Street
 - plan for new regional uses on Lake Street



LifeMode Group: Cozy Country Living

Green Acres

6A

Households: 3,794,000

Average Household Size: 2.69

Median Age: 43.0

Median Household Income: \$72,000

WHO ARE WE?

The *Green Acres* lifestyle features country living and self-reliance. They are avid do-it-yourselfers, maintaining and remodeling their homes, with all the necessary power tools to accomplish the jobs. Gardening, especially growing vegetables, is also a priority, again with the right tools, tillers, tractors, and riding mowers. Outdoor living also features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf. Self-described conservatives, residents of *Green Acres* remain pessimistic about the near future yet are heavily invested in it.

OUR NEIGHBORHOOD

- Rural enclaves in metropolitan areas, primarily (not exclusively) older homes with acreage; new housing growth in the past 10 years.
- Single-family, owner-occupied housing, with a median value of \$197,000.
- An older market, primarily married couples, most with no children.

SOCIOECONOMIC TRAITS

- Education: 60% are college educated.
- Unemployment is low at 6% (Index 70); labor force participation rate is high at 67.4% (Index 108).
- Income is derived not only from wages and salaries but also from self-employment (more than 15% of households), investments (30% of households), and increasingly, from retirement.
- They are cautious consumers with a focus on quality and durability.
- Comfortable with technology, more as a tool than a trend: banking or paying bills online is convenient; but the Internet is not viewed as entertainment.
- Economic outlook is professed as pessimistic, but consumers are comfortable with debt, primarily as home and auto loans, and investments.



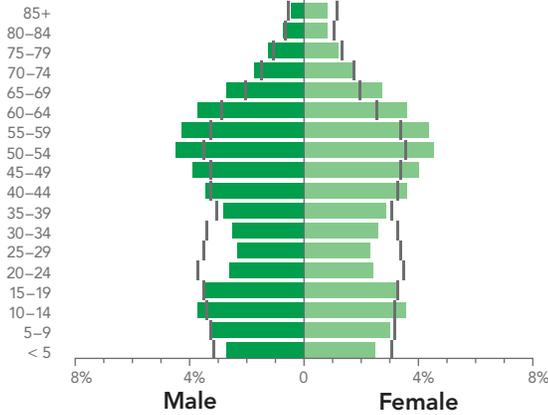
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



AGE BY SEX (Esri data)

Median Age: 43.0 US: 37.6

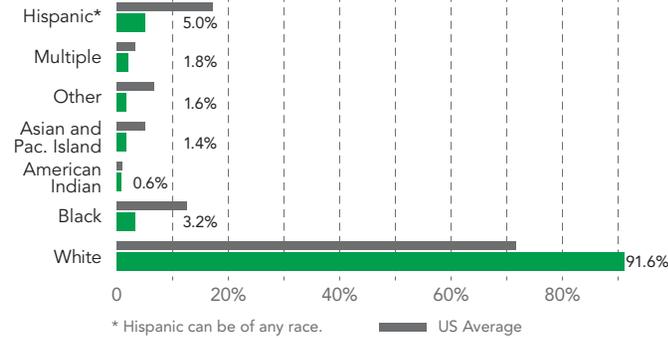
I Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 24.0 US: 62.1



INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

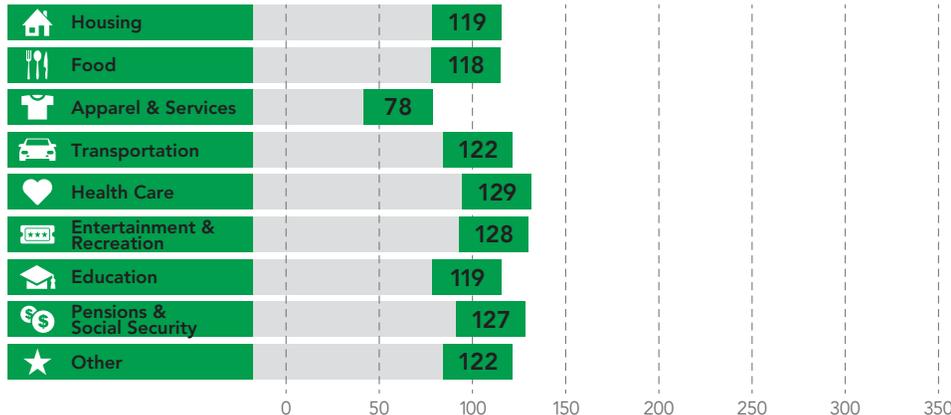


Median Net Worth



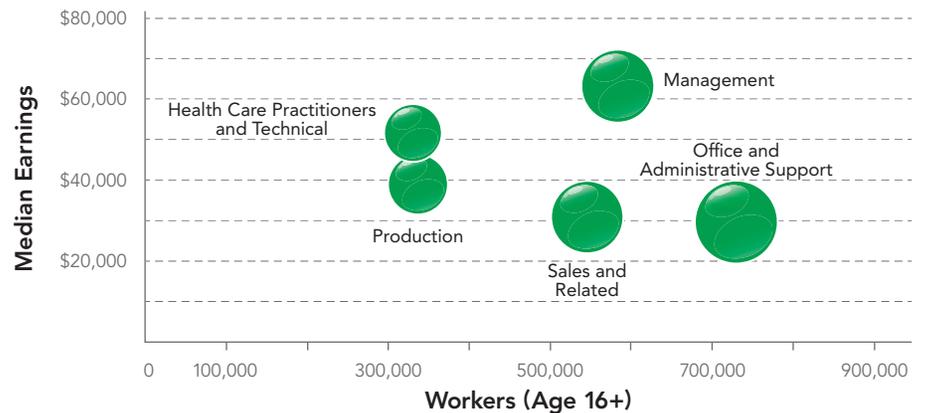
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Purchasing choices reflect *Green Acres*' residents country life, including a variety of vehicles from trucks and SUVs to ATVs and motorcycles, preferably late model.
- Homeowners favor DIY home improvement projects and gardening.
- Media of choice are provided by satellite service, radio, and television, also with an emphasis on country and home and garden.
- *Green Acres* residents pursue physical fitness vigorously, from working out on home exercise equipment to playing a variety of sports.
- Residents are active in their communities and a variety of social organizations, from fraternal orders to veterans' clubs.

HOUSING

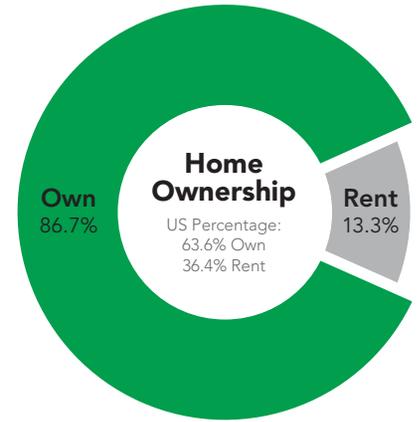
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

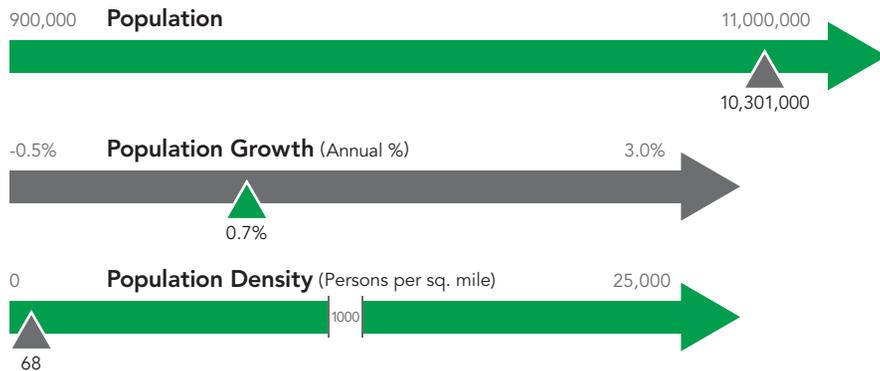
Median Value:
\$197,000

US Median: \$177,000



POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





LifeMode Group: Cozy Country Living

Green Acres

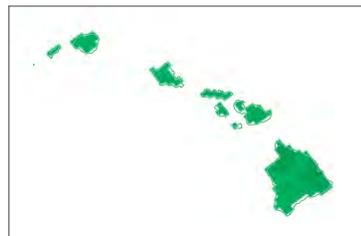
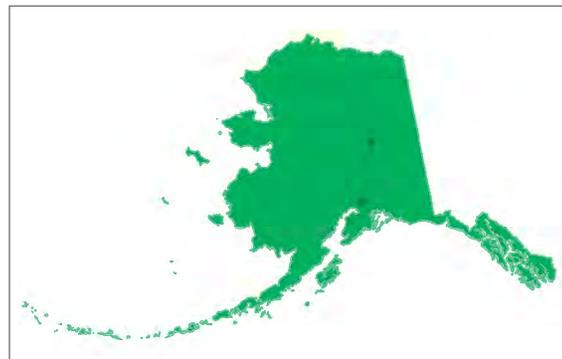
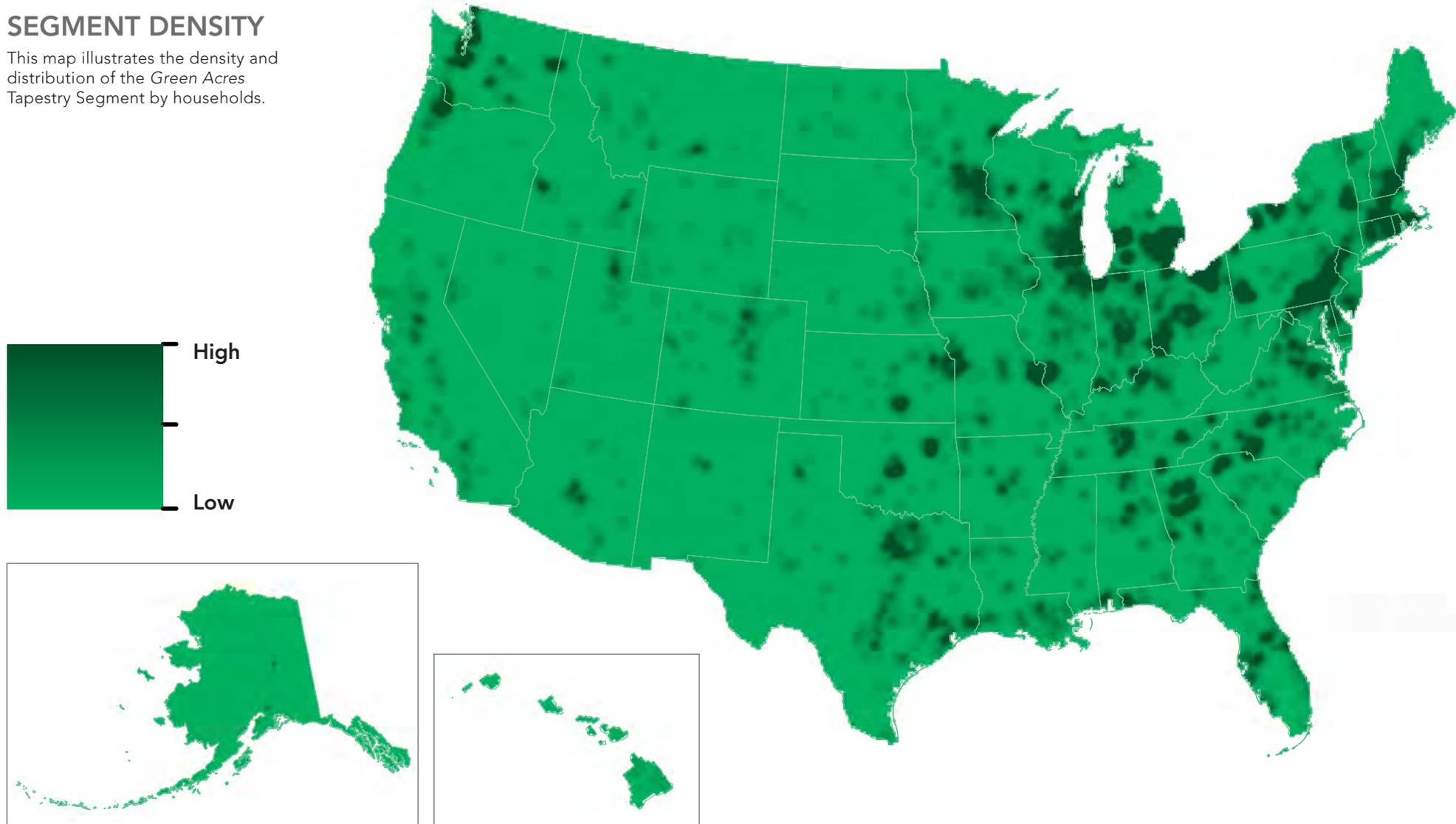


TAPESTRY
SEGMENTATION

esri.com/tapestry

SEGMENT DENSITY

This map illustrates the density and distribution of the *Green Acres* Tapestry Segment by households.

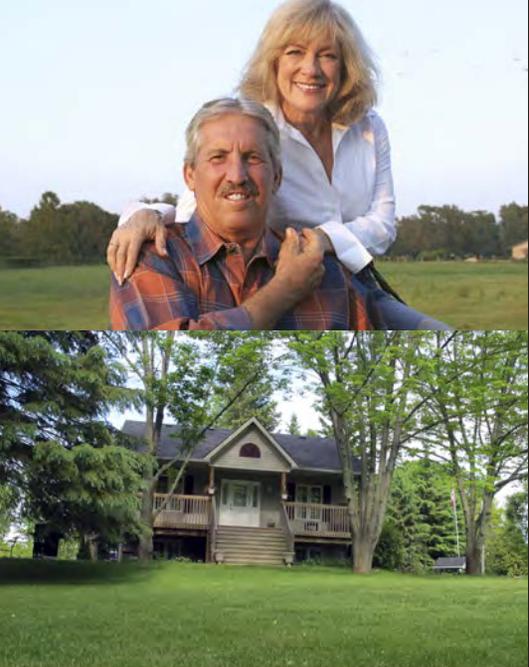


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For more information
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info@esri.com
esri.com





LifeMode Group: Cozy Country Living

Salt of the Earth

6B

Households: 3,517,000

Average Household Size: 2.58

Median Age: 43.1

Median Household Income: \$53,000

WHO ARE WE?

Salt of the Earth residents are entrenched in their traditional, rural lifestyles. Citizens here are older, and many have grown children that have moved away. They still cherish family time and also tending to their vegetable gardens and preparing homemade meals. Residents embrace the outdoors; they spend most of their free time preparing for their next fishing, boating, or camping trip. The majority has at least a high school diploma or some college education; many have expanded their skill set during their years of employment in the manufacturing and related industries. They may be experts with DIY projects, but the latest technology is not their forte. They use it when absolutely necessary, but seek face-to-face contact in their routine activities.

OUR NEIGHBORHOOD

- This large segment is concentrated in the Midwest, particularly in Ohio, Pennsylvania, and Indiana.
- Due to their rural setting, households own two vehicles to cover their long commutes, often across county boundaries.
- Home ownership rates are very high (Index 132). Single-family homes are affordable, valued at 25 percent less than the national market.
- Two in three households are composed of married couples; less than half have children at home.

SOCIOECONOMIC TRAITS

- Steady employment in construction, manufacturing, and related service industries.
- Completed education: 42% with a high school diploma only.
- Household income just over the national median, while net worth is double the national median.
- Spending time with family their top priority.
- Cost-conscious consumers, loyal to brands they like, with a focus on buying American.
- Last to buy the latest and greatest products.
- Try to eat healthy, tracking the nutrition and ingredients in the food they purchase.



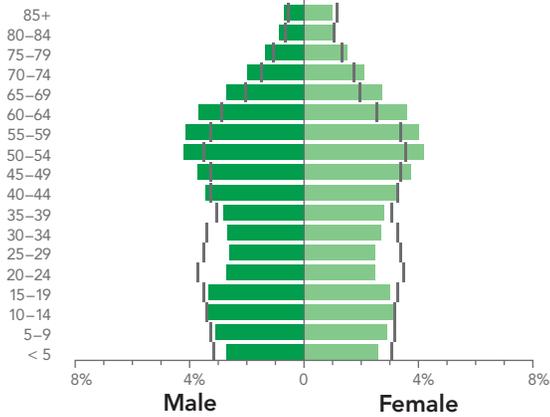
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



AGE BY SEX (Esri data)

Median Age: 43.1 US: 37.6

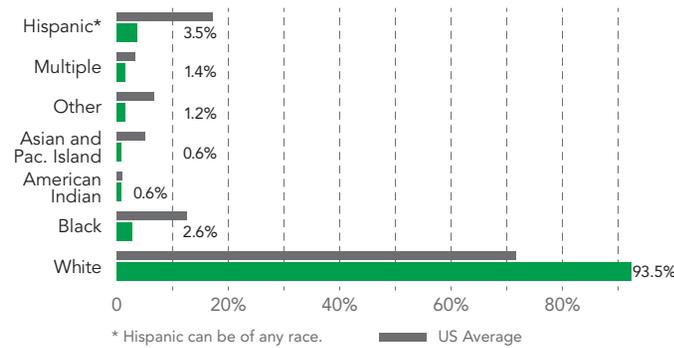
I Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 18.3 US: 62.1



INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

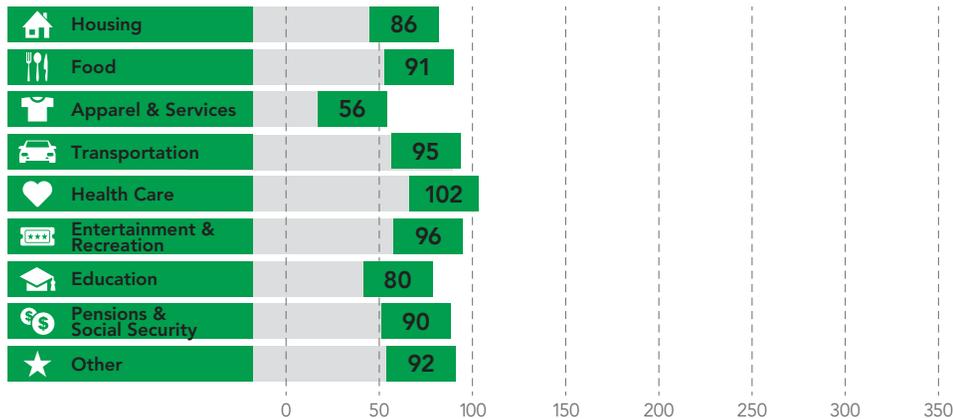


Median Net Worth



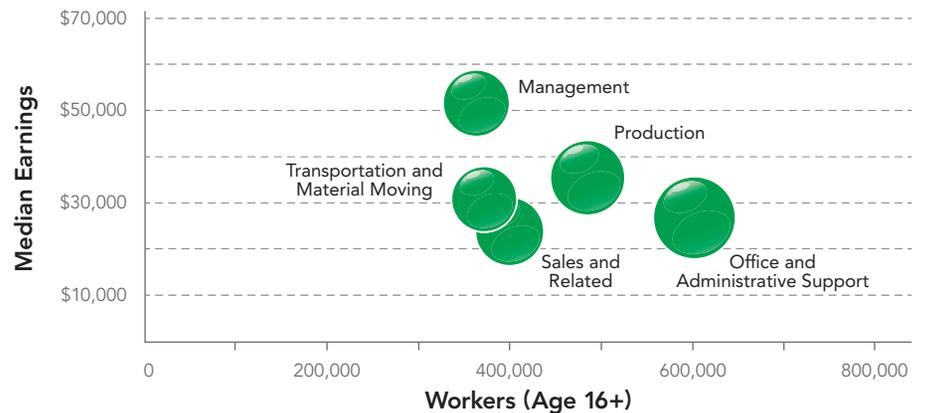
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Outdoor sports and activities, such as fishing, boating, hunting, and overnight camping trips are popular.
- To support their pastimes, truck ownership is high; many also own an ATV.
- They own the equipment to maintain their lawns and tend to their vegetable gardens.
- Residents often tackle home remodeling and improvement jobs themselves.
- Due to their locale, they own satellite dishes, and many still require dial-up modems to access the Internet.
- These conservative consumers prefer to conduct their business in person rather than online. They use an agent to purchase insurance.

HOUSING

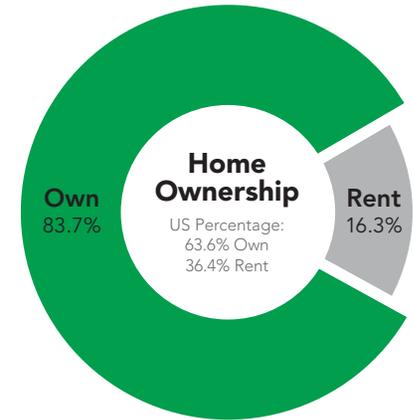
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Typical Housing:
Single Family

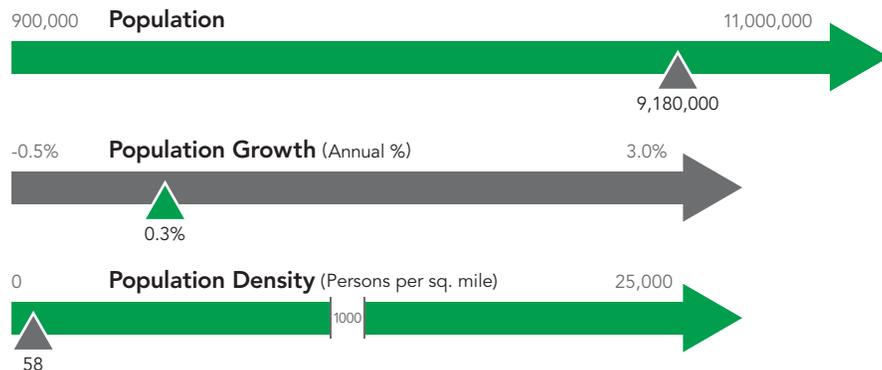
Median Value:
\$134,000

US Median: \$177,000



POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

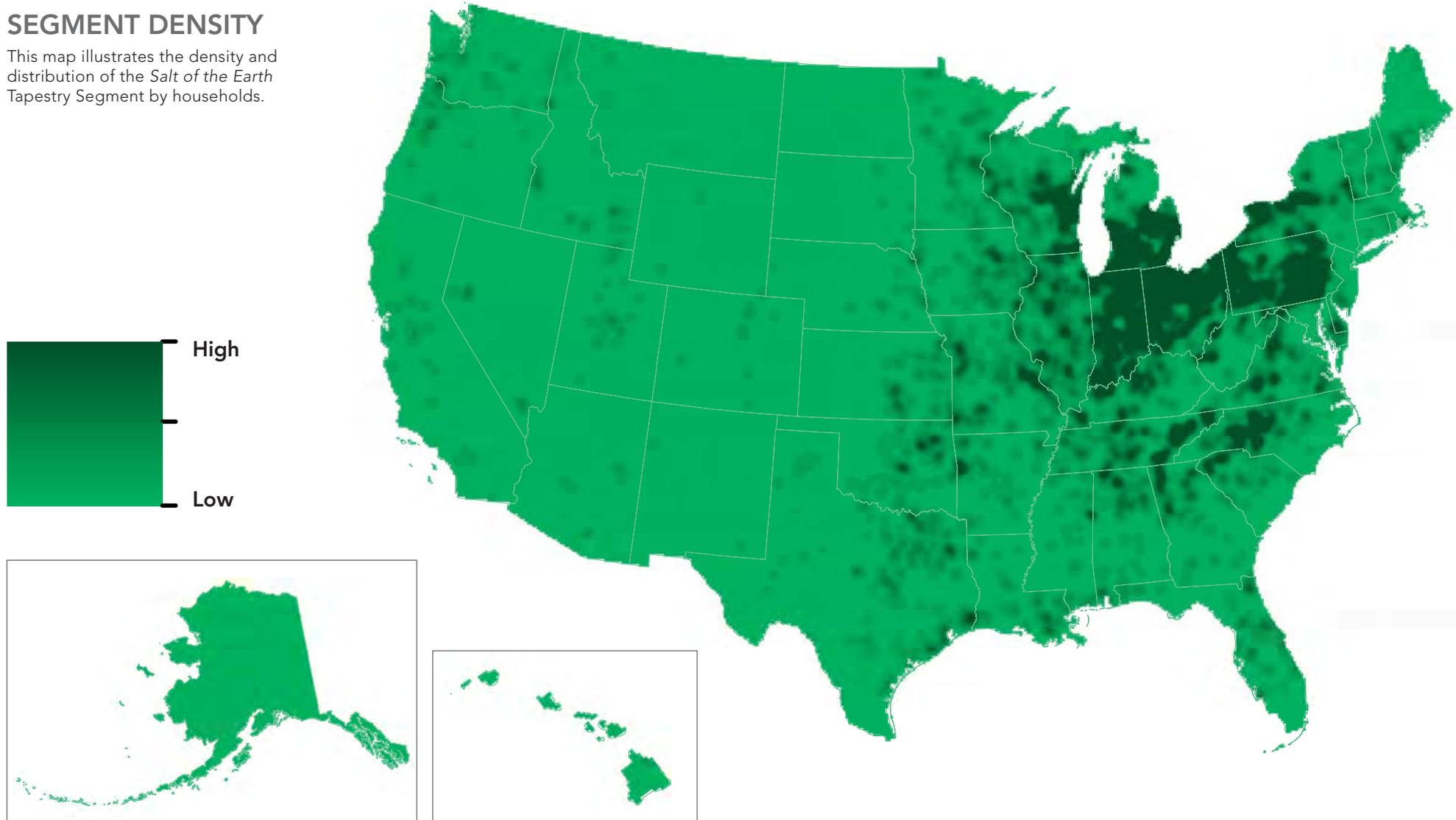
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *Salt of the Earth* Tapestry Segment by households.



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LifeMode Group: Cozy Country Living

The Great Outdoors



Households: 1,850,000

Average Household Size: 2.43

Median Age: 46.3

Median Household Income: \$53,000

WHO ARE WE?

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.

OUR NEIGHBORHOOD

- Over 55% of households are married-couple families; 36% are couples with no children living at home.
- Average household size is slightly smaller at 2.43.
- Typical of areas with rustic appeal, the housing inventory features single-family homes (76%) and mobile homes (16%); a significant inventory of seasonal housing is available (Index 398).
- Residents live in small towns and rural communities throughout the West, South, and Northeast regions of the country.
- More than half of all homes were constructed between 1970 and 2000.
- Most households have one or two vehicles; average travel time to work is slightly higher (28 minutes) despite a disproportionate number that work from home (Index 155).

SOCIOECONOMIC TRAITS

- Nearly 60% have attended college or hold a degree.
- Unemployment is lower at 8% (Index 88), but so is labor force participation at 60%.
- Typical of neighborhoods with older residents, income from retirement and Social Security is common, but residents also derive income from self-employment and investments.
- Residents are very do-it-yourself oriented and cost conscious.
- Many service their own autos, work on home improvement and remodeling projects, and maintain their own yards.
- They prefer domestic travel to trips abroad.



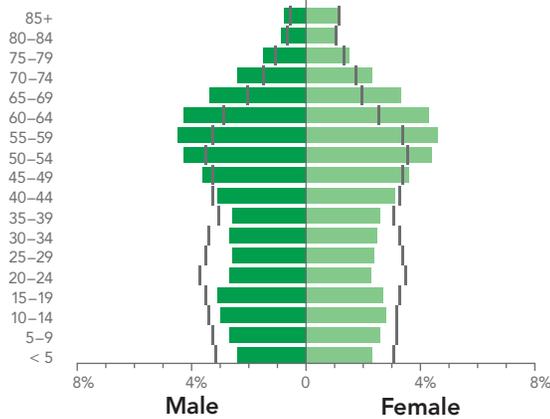
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



AGE BY SEX (Esri data)

Median Age: 46.3 US: 37.6

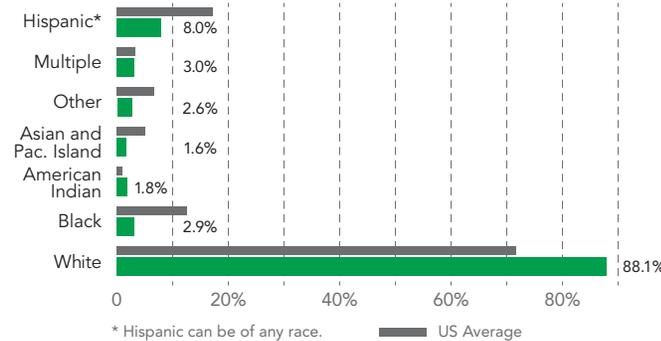
I Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 33.7 US: 62.1



INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

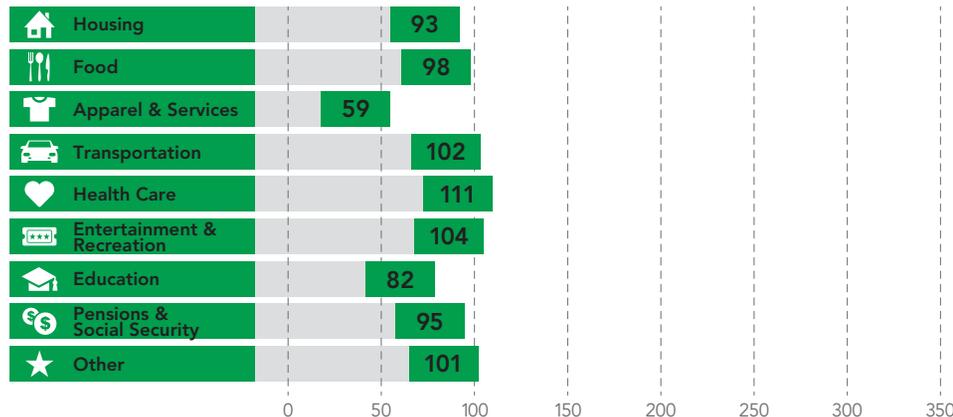


Median Net Worth



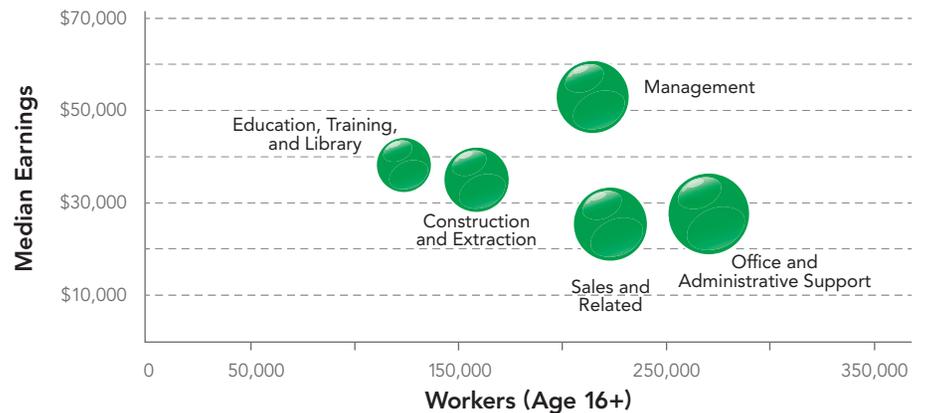
AVERAGE HOUSEHOLD BUDGET INDEX

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OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Satellite dishes and riding lawn mowers are familiar sights in these rural settings, along with multiple vehicles; four-wheel drive trucks are popular, too.
- Residents are members of AARP and veterans' clubs and support various civic causes.
- Technology is not central in their lives: light use of Internet connectivity for shopping and entertainment.
- Most households have pets—dogs or cats.
- Television channels such as CMT, History, and Fox News are popular.
- They enjoy outdoor activities such as hiking, hunting, fishing, and boating.

HOUSING

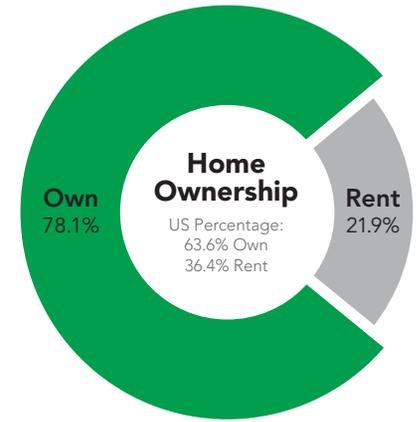
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Typical Housing:
Single Family

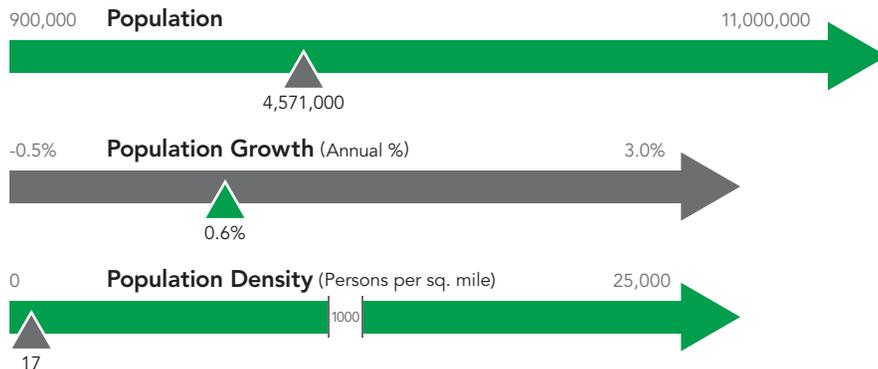
Median Value:
\$189,000

US Median: \$177,000



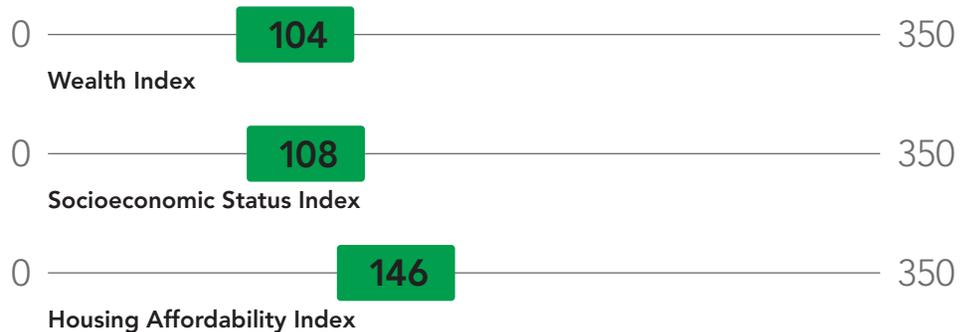
POPULATION CHARACTERISTICS

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ESRI INDEXES

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LifeMode Group: Cozy Country Living

The Great Outdoors

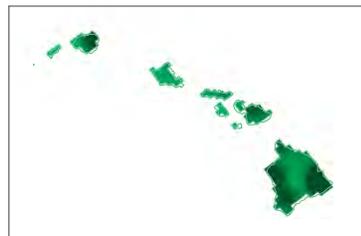
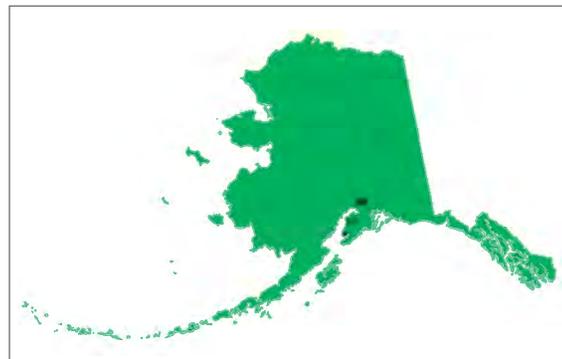
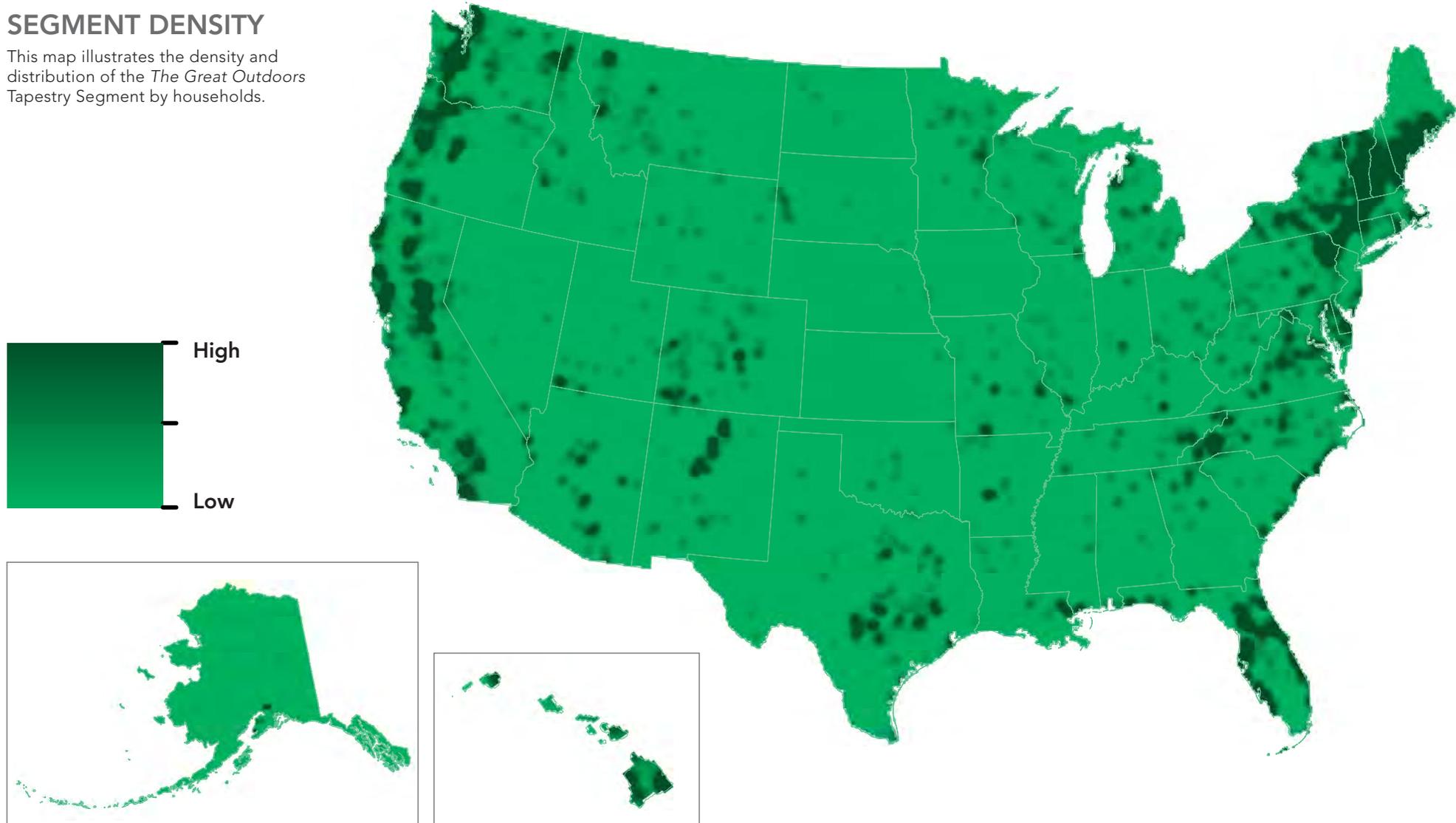


TAPESTRY
SEGMENTATION

esri.com/tapestry

SEGMENT DENSITY

This map illustrates the density and distribution of the *The Great Outdoors* Tapestry Segment by households.



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1-800-447-9778
info@esri.com
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LifeMode Group: Cozy Country Living

Rural Resort Dwellers



Households: 1,215,000

Average Household Size: 2.21

Median Age: 52.4

Median Household Income: \$46,000

WHO ARE WE?

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.

OUR NEIGHBORHOOD

- Housing is owner-occupied, single-family homes, with some mobile homes. A strong market for second homes, these rural areas provide affordable homes valued at 8% less than the US median home value. Over half of the housing units are vacant due to a high seasonal vacancy rate.
- In this older market, 42% of households consist of married couples with no children at home, while another 28% are single person. Married couples with children at home have older school-age children.
- Set in scenic rural locations with proximity to outdoor activities, two vehicles are essential to get around.

SOCIOECONOMIC TRAITS

- *Rural Resort Dwellers* residents are close to retirement. They've accumulated wealth and begun to shift their portfolios to low-risk assets. These active residents continue to work in skilled occupations.
- Simple tastes and modesty characterize these blue collar residents. They shop for timeless, comfortable clothing, but only when something must be replaced. They pay little attention to advertising and usually stick to the brands they know.
- They spend time with their spouses and also maintain a social calendar.



Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



AGE BY SEX (Esri data)

Median Age: **52.4** US: 37.6

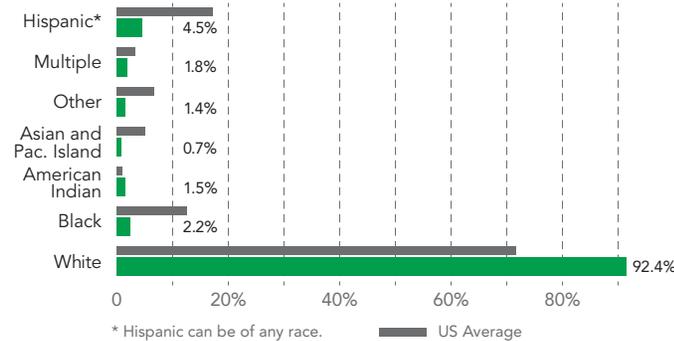
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RACE AND ETHNICITY (Esri data)

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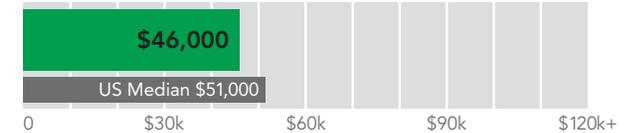
Diversity Index: **21.9** US: 62.1



INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

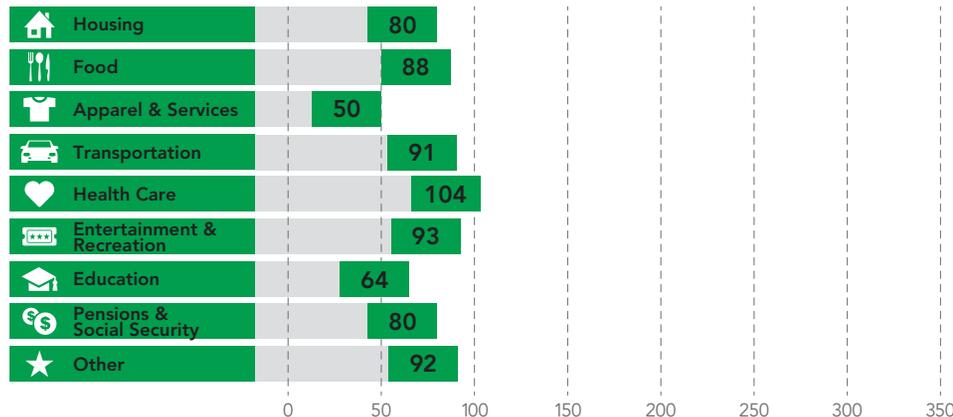


Median Net Worth



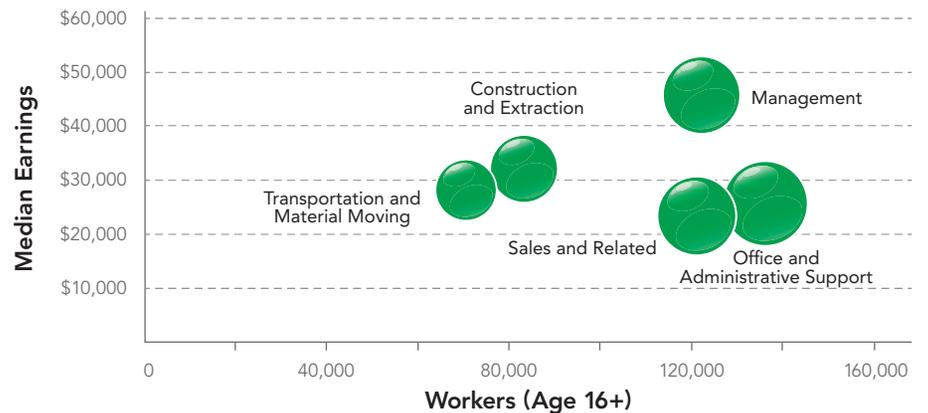
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





Rural Resort Dwellers



MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Residents drive older domestic vehicles and prefer to spend their disposable income on gear to support their hobbies, which include freshwater fishing, hunting with a rifle or shotgun, and motorcycling.
- At home, *Rural Resort Dwellers* residents spend any free time working on their vehicles and maintaining their gear. They make frequent trips to their local hardware store for parts and tools. These hands-on consumers are also passionate about vegetable gardening.
- Due to their remote locations, these neighborhoods have satellite dishes. A few residents still rely on dial-up modems to stay connected. They don't access the Internet often but will make online purchases for items difficult to find in nearby stores.
- Their taste in TV shows reflects their hobbies—Animal Planet, Discovery Channel, and the DIY Network.

HOUSING

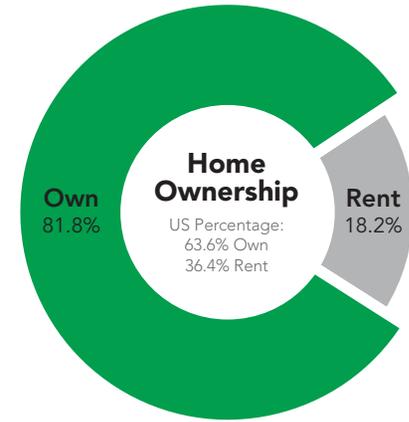
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

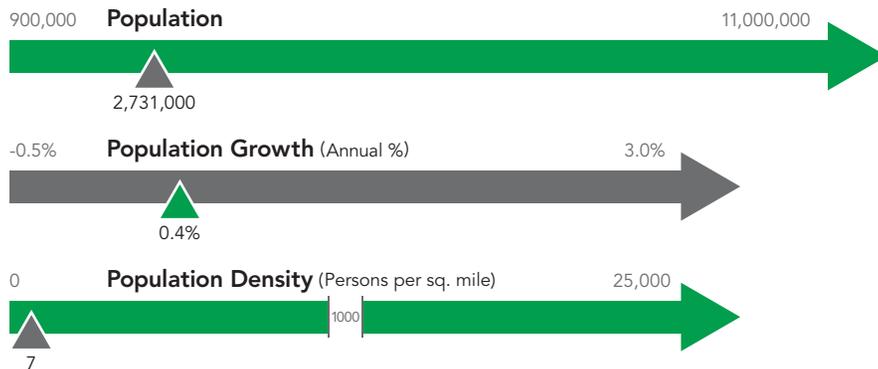
Median Value:
\$163,000

US Median: \$177,000



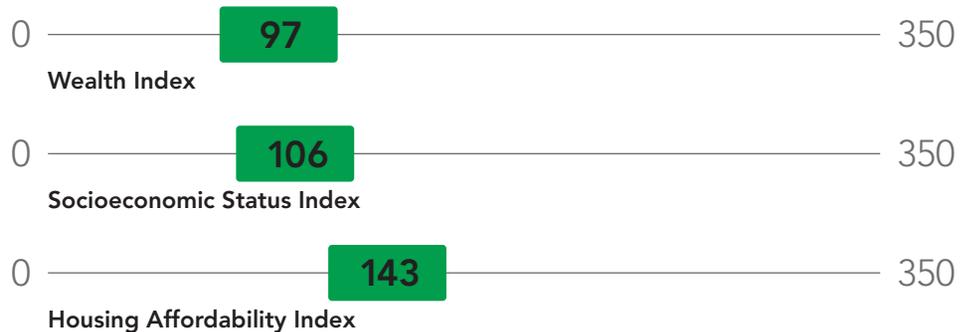
POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





LifeMode Group: Cozy Country Living

Rural Resort Dwellers

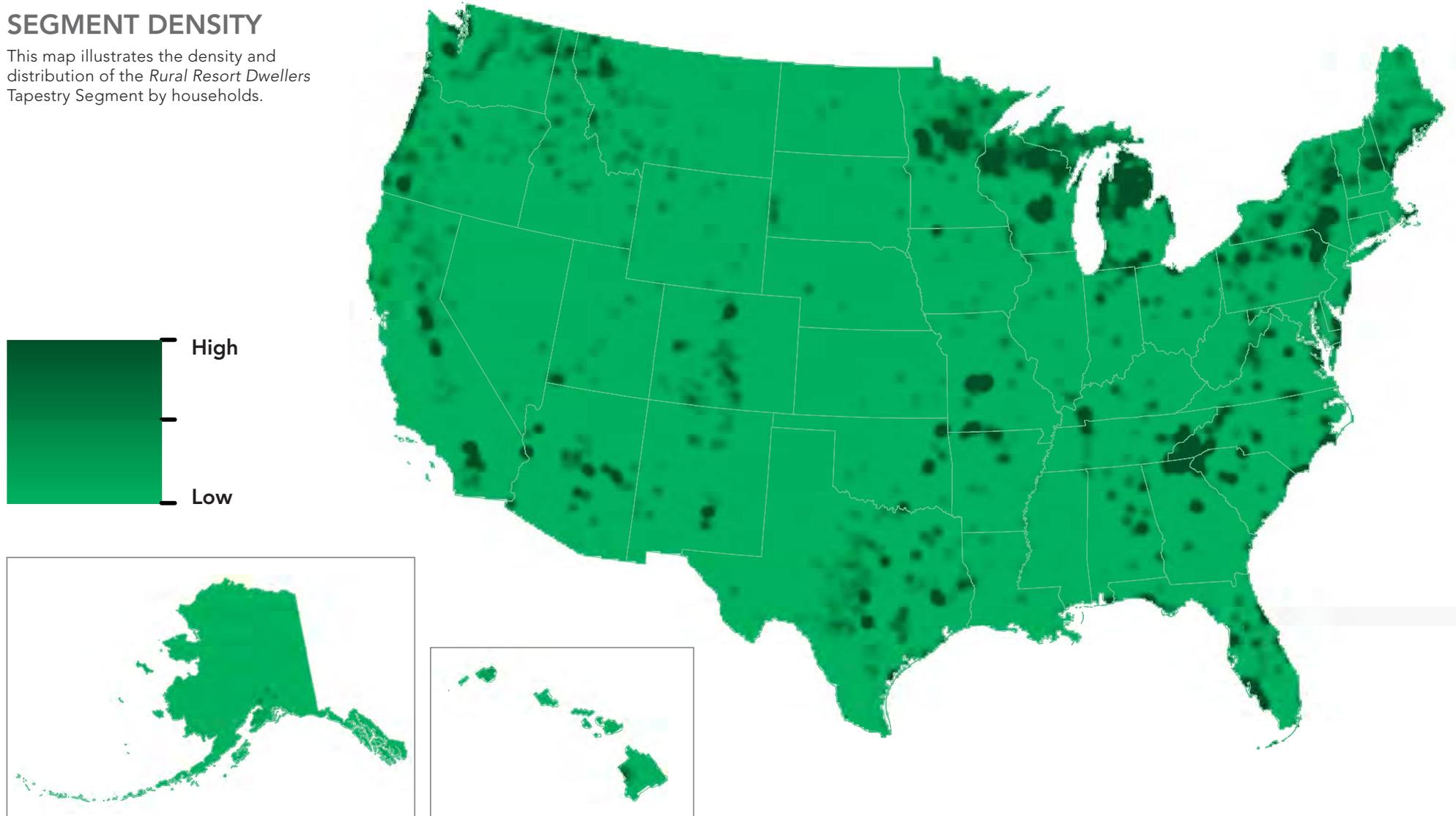


TAPESTRY
SEGMENTATION

esri.com/tapestry

SEGMENT DENSITY

This map illustrates the density and distribution of the *Rural Resort Dwellers* Tapestry Segment by households.



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1-800-447-9778
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LifeMode Group: Cozy Country Living

Heartland Communities



Households: 2,864,000

Average Household Size: 2.38

Median Age: 41.5

Median Household Income: \$39,000

WHO ARE WE?

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, always buy American, and favor domestic driving vacations over foreign plane trips.

OUR NEIGHBORHOOD

- Rural communities or small towns are concentrated in the Midwest, from older Rustbelt cities to the Great Plains.
- Distribution of household types is comparable to the US, primarily (but not the majority) married couples, more with no children, and a slightly higher proportion of singles (Index 112) that reflects the aging of the population.
- Residents own modest, single-family homes built before 1970.
- They own one or two vehicles; commutes are short (Index 95).

SOCIOECONOMIC TRAITS

- Retirees in this market depress the average labor force participation rate to less than 60% (Index 95), but the unemployment rate is comparable to the US.
- More workers are white collar than blue collar; more skilled than unskilled.
- The rural economy of this market provides employment in the manufacturing, construction, and agriculture industries.
- These are budget savvy consumers; they stick to brands they grew up with and know the price of goods they purchase. Buying American is important.
- Daily life is busy, but routine. Working on the weekends is not uncommon.
- Residents trust TV and newspapers more than any other media.
- Skeptical about their financial future, they stick to community banks and low-risk investments.



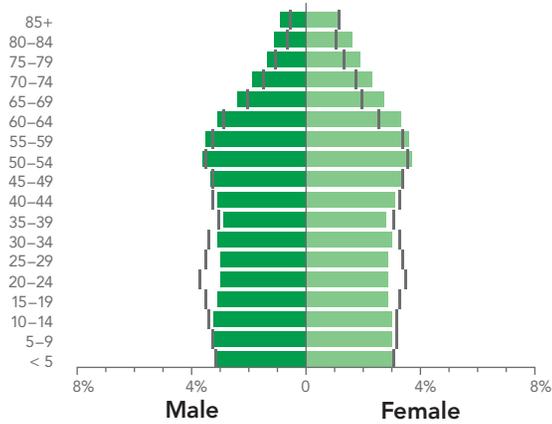
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



AGE BY SEX (Esri data)

Median Age: 41.5 US: 37.6

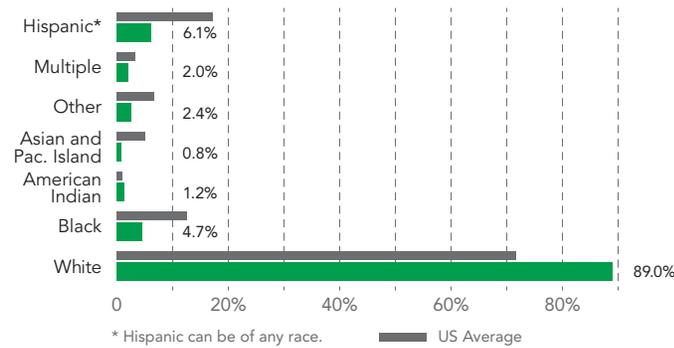
I Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 29.6 US: 62.1



INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

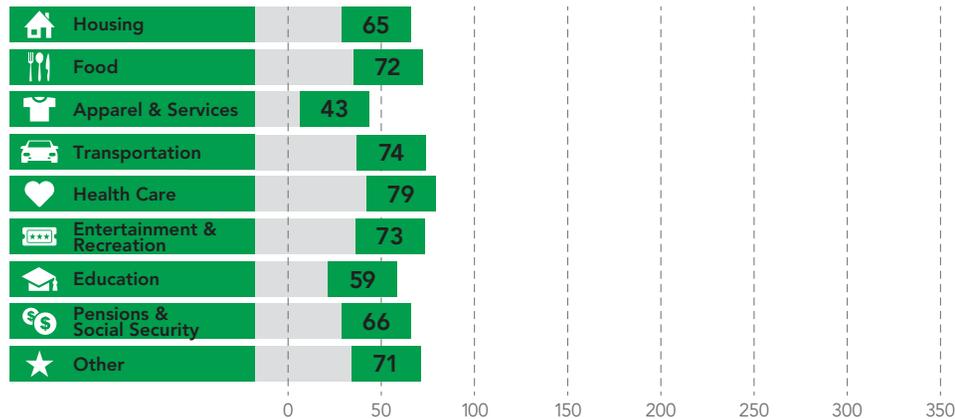


Median Net Worth



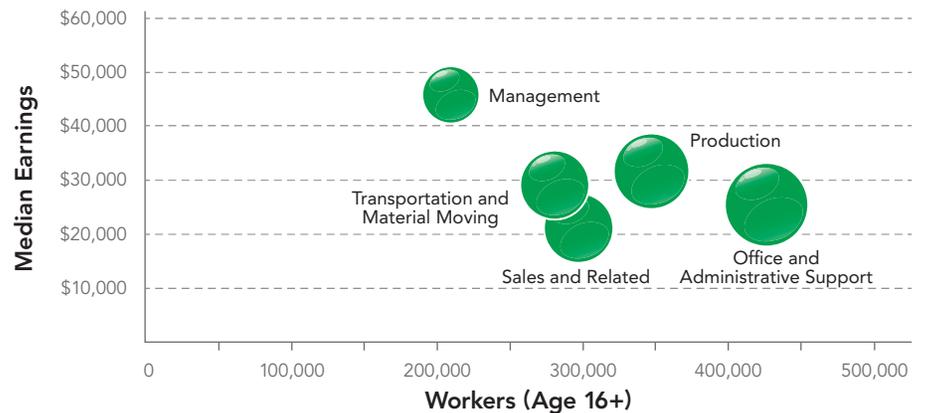
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- Traditional in their ways, residents of *Heartland Communities* choose to bank and pay their bills in person and purchase insurance from an agent.
- Most have high-speed Internet access at home or on their cell phone but aren't ready to go paperless.
- Many residents have paid off their home mortgages but still hold auto loans and student loans. Noninterest checking accounts are common.
- To support their local community, residents participate in public activities.
- Home remodeling is not a priority, but homeowners do tackle necessary maintenance work on their cherished homes. They have invested in riding lawn mowers to maintain their larger yards.
- They enjoy country music and watch CMT.
- Motorcycling, hunting, and fishing are popular; walking is the main form of exercise.
- To get around these semirural communities, residents prefer domestic trucks or SUVs.
- They prefer to travel in the US and favor the convenience of packaged deals.

HOUSING

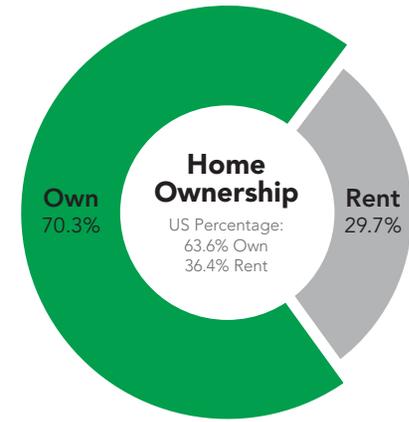
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

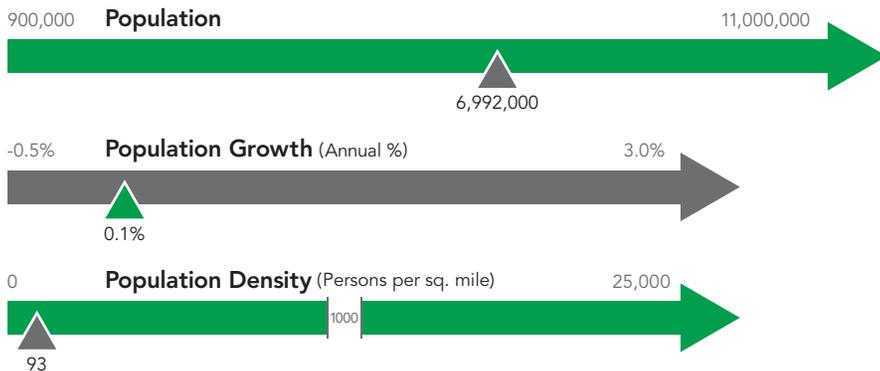
Median Value:
\$89,000

US Median: \$177,000



POPULATION CHARACTERISTICS

Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





LifeMode Group: Cozy Country Living

Heartland Communities

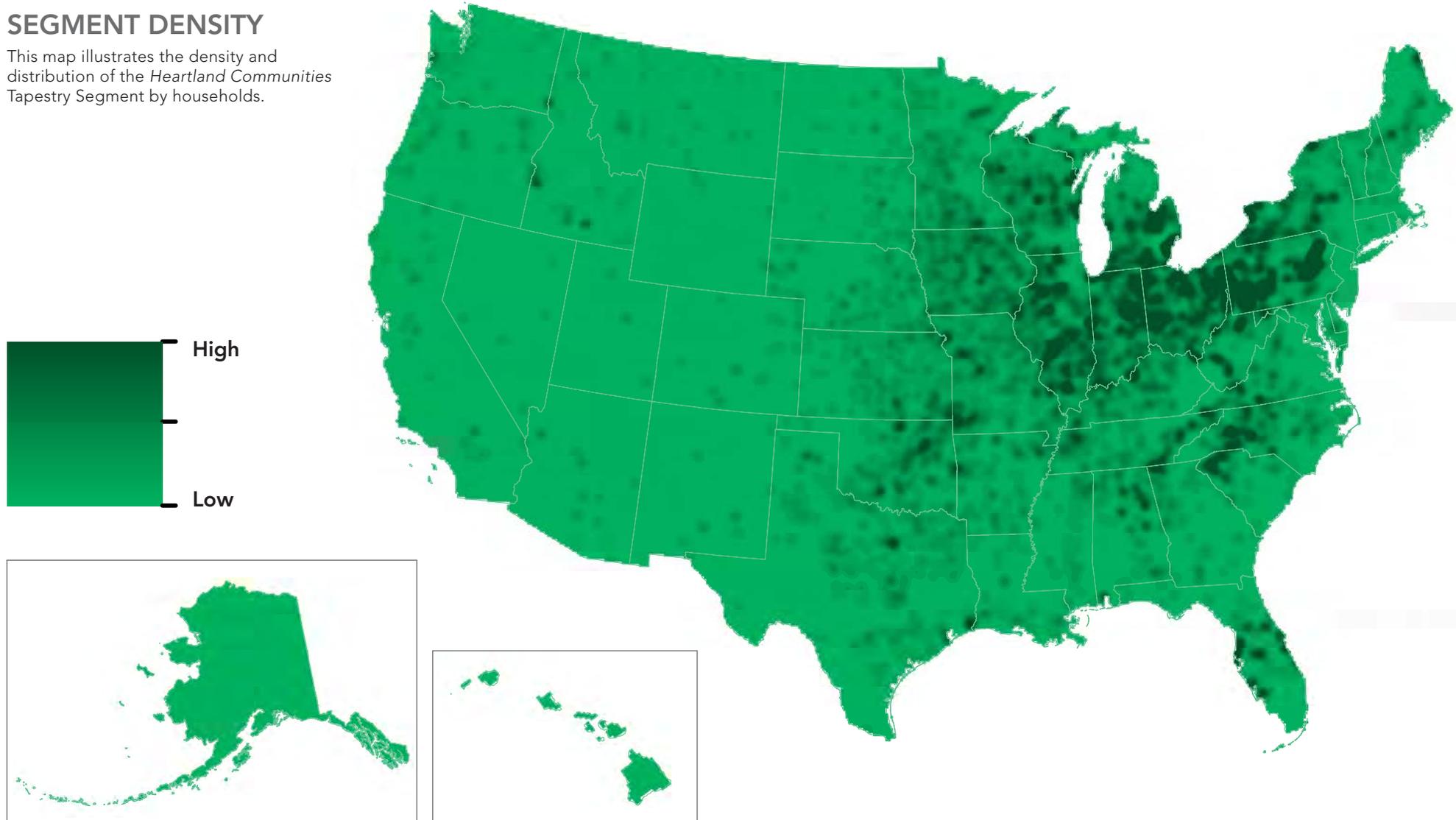


TAPESTRY
SEGMENTATION

esri.com/tapestry

SEGMENT DENSITY

This map illustrates the density and distribution of the *Heartland Communities* Tapestry Segment by households.



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LifeMode Group: Hometown
Traditional Living

12B

Households: 2,369,000

Average Household Size: 2.50

Median Age: 34.8

Median Household Income: \$37,000

WHO ARE WE?

Residents in this segment live primarily in low-density, settled neighborhoods in the Midwest. The households are a mix of married-couple families and singles. Many families encompass two generations who have lived and worked in the community; their children are likely to follow suit. The manufacturing, retail trade, and health care sectors are the primary sources of employment for these residents. This is a younger market—beginning householders who are juggling the responsibilities of living on their own or a new marriage, while retaining their youthful interests in style and fun.

OUR NEIGHBORHOOD

- Married couples are the dominant household type, but fewer than expected from the younger age profile and fewer with children (Index 79); however, there are higher proportions of single-parent (Index 146) and single-person households (Index 112).
- Average household size is slightly lower at 2.50.
- Homes are primarily single family or duplexes in older neighborhoods, built before 1940 (Index 183).
- Most neighborhoods are located in lower-density urban clusters of metro areas throughout the Midwest and South.
- Average commuting time to work is slightly shorter (Index 88).
- Households have one or two vehicles.

SOCIOECONOMIC TRAITS

- Over 70% have completed high school or some college.
- Unemployment is higher at 10.9% (Index 127); labor force participation is also a bit higher at 64.6%.
- Over three quarters of households derive income from wages and salaries, augmented by Supplemental Security Income (Index 122) and public assistance (Index 149).
- Cost-conscious consumers that are comfortable with brand loyalty, unless the price is too high.
- Connected and comfortable with the Internet, they are more likely to participate in online gaming or to access dating websites.
- TV is seen as the most trusted media.



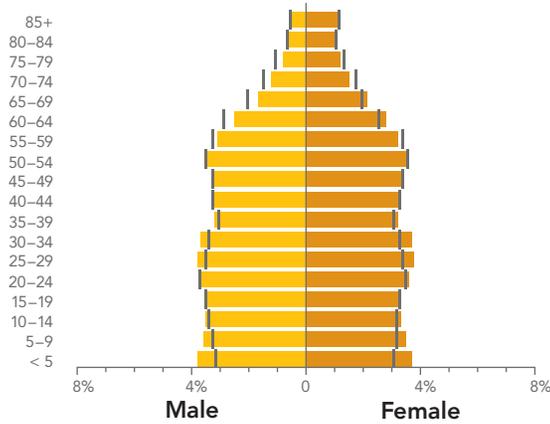
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



AGE BY SEX (Esri data)

Median Age: **34.8** US: 37.6

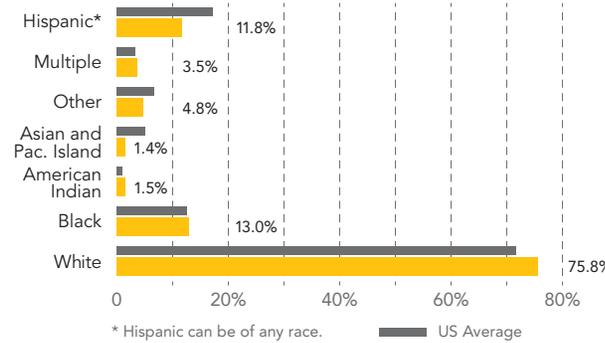
| Indicates US



RACE AND ETHNICITY (Esri data)

The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **53.1** US: 62.1



INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

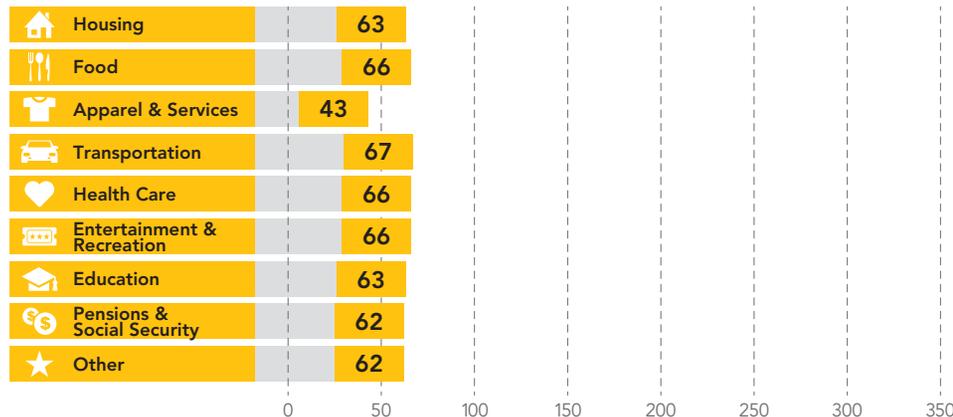


Median Net Worth



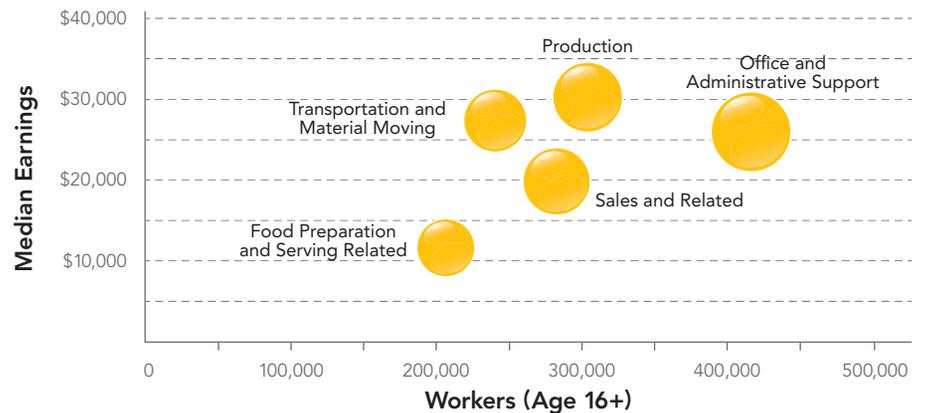
AVERAGE HOUSEHOLD BUDGET INDEX

The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average. Consumer expenditures are estimated by Esri.



OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- They shop for groceries at discount stores such as Walmart supercenters; Kmart is also a favorite for apparel and sundry household and personal care products.
- Convenience stores are commonly used for fuel or picking up incidentals like lottery tickets.
- They tend to carry credit card balances, have student loans, and pay bills in person.
- Half of households have abandoned landlines for cell phones only.
- They watch their favorite channels including QVC, CMT, and Game Show Network.
- They're fast food devotees.
- They enjoy outdoor activities such as camping and taking trips to the zoo.

HOUSING

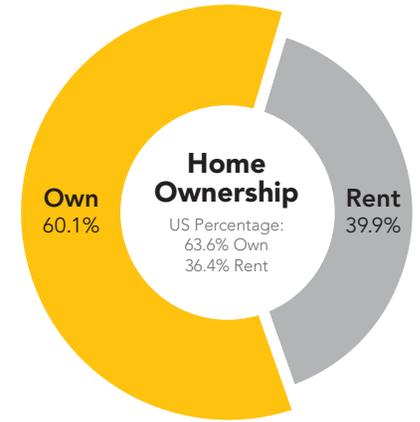
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Typical Housing:
Single Family

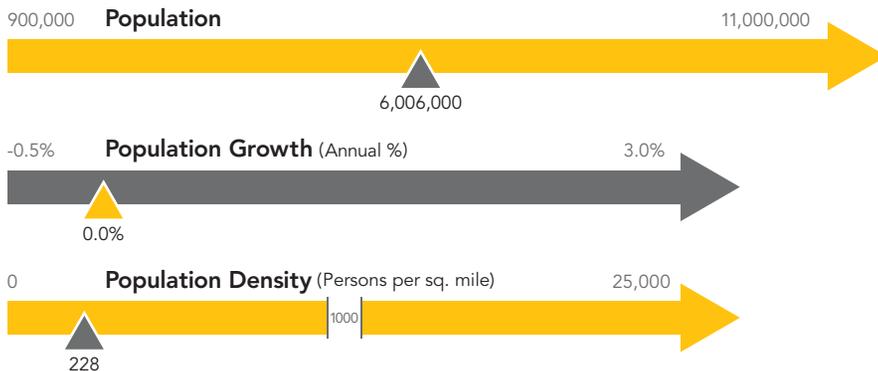
Median Value:
\$79,000

US Median: \$177,000



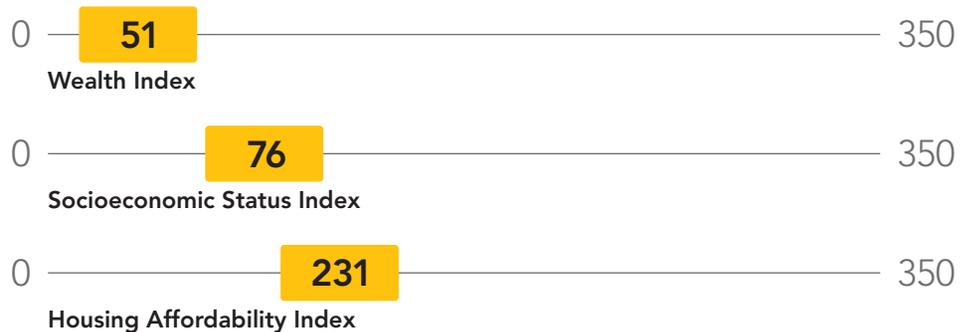
POPULATION CHARACTERISTICS

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ESRI INDEXES

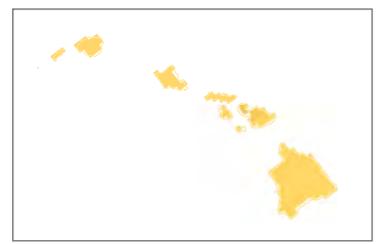
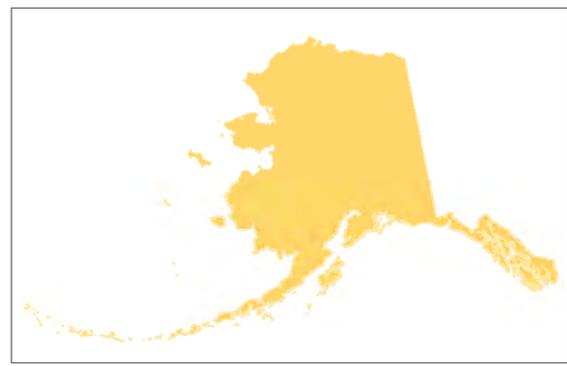
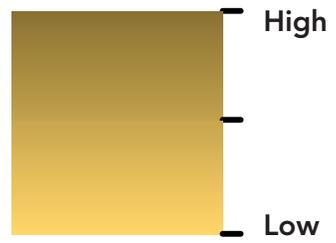
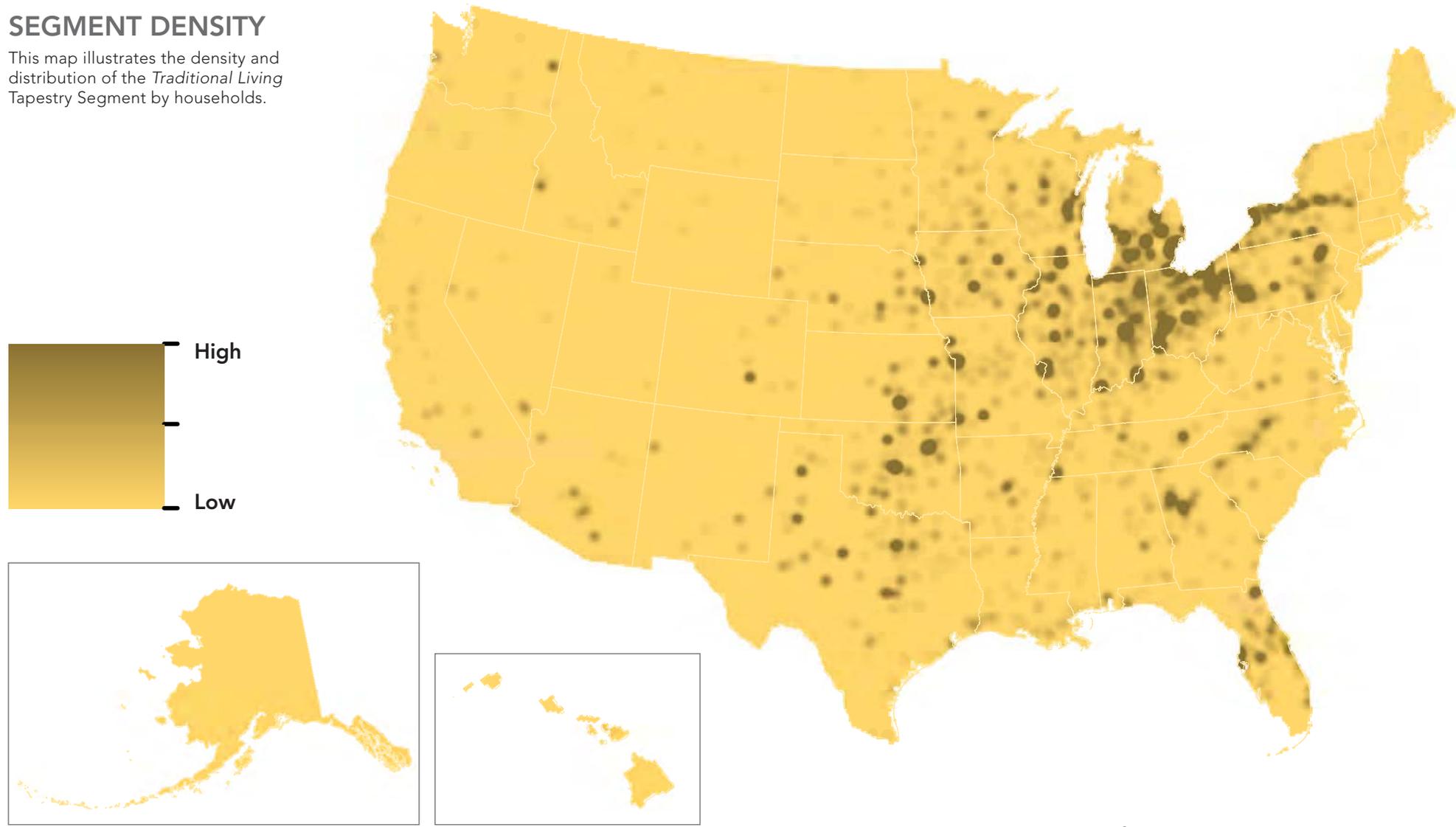
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *Traditional Living* Tapestry Segment by households.



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LifeMode Group: Hometown

Small Town Simplicity

12C

Households: 2,305,000

Average Household Size: 2.25

Median Age: 40.0

Median Household Income: \$27,000

WHO ARE WE?

Small Town Simplicity includes young families and senior householders that are bound by community ties. The lifestyle is down-to-earth and semirural, with television for entertainment and news, and emphasis on convenience for both young parents and senior citizens. Residents embark on pursuits including online computer games, scrapbooking, and rural activities like hunting and fishing. Since almost 1 in 4 households is below poverty level, residents also keep their finances simple—paying bills in person and avoiding debt.

OUR NEIGHBORHOOD

- They reside in small towns or semirural neighborhoods, mostly outside metropolitan areas.
- Homes are a mix of older single-family houses (61%), apartments, and mobile homes.
- A majority, 51%, of homes are owner occupied. (Index 80).
- Median home value of \$88,000 is about half the US median.
- Average rent is \$600 (Index 62).
- This is an older market, with almost half of the householders aged 55 years or older, and predominantly single-person households (Index 139).

SOCIOECONOMIC TRAITS

- Education: 65% with high school diploma or some college.
- Unemployment higher at 11.9% (Index 138).
- Labor force participation lower at 51% (Index 81), which could result from lack of jobs or retirement.
- Income from wages and salaries (Index 82), Social Security (Index 142) or retirement (Index 112), increased by Supplemental Security Income (Index 203).
- Price-conscious consumers that shop accordingly, with coupons at discount centers.
- Connected, but not to the latest or greatest gadgets; keep their landlines.
- Community-orientated residents; more conservative than middle-of-the-road.
- Rely on television or newspapers to stay informed.



Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



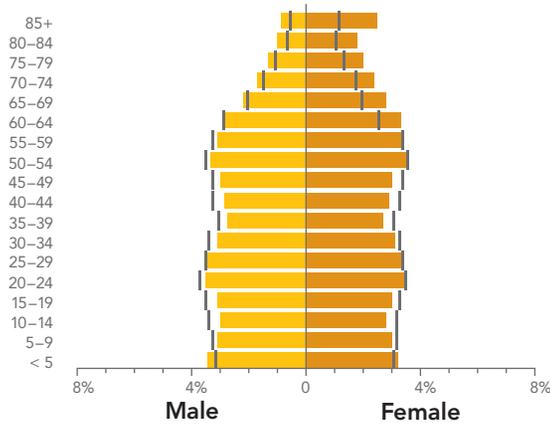
Small Town Simplicity



AGE BY SEX (Esri data)

Median Age: **40.0** US: 37.6

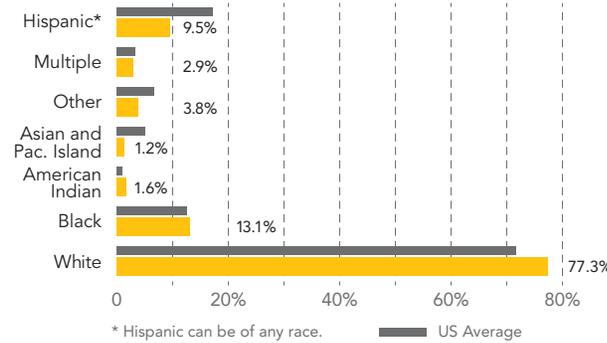
I Indicates US



RACE AND ETHNICITY (Esri data)

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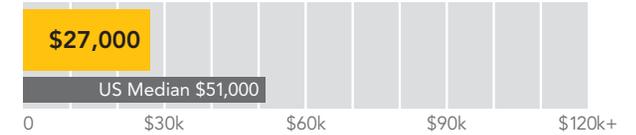
Diversity Index: **49.1** US: 62.1



INCOME AND NET WORTH

Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.

Median Household Income

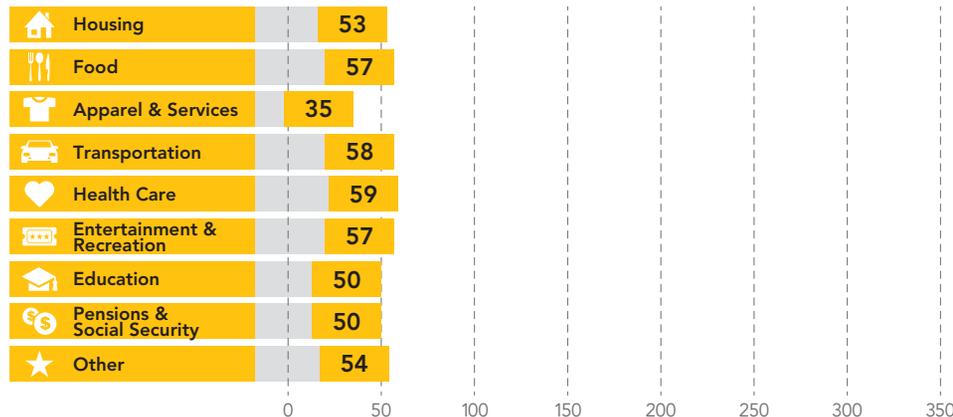


Median Net Worth



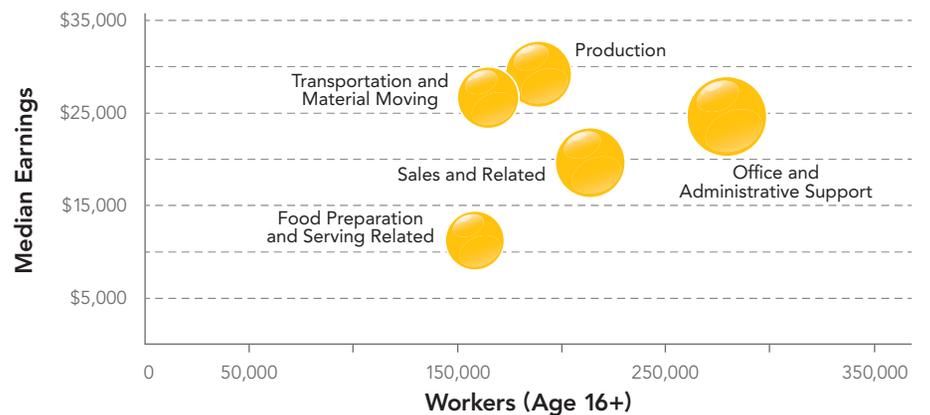
AVERAGE HOUSEHOLD BUDGET INDEX

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OCCUPATION BY EARNINGS

The five occupations with the highest number of workers in the market are displayed by median earnings. Data from the Census Bureau's American Community Survey.





MARKET PROFILE (Consumer preferences are estimated from data by GfK MRI)

- *Small Town Simplicity* features a semirural lifestyle, complete with trucks (domestic, of course), ATVs, and vegetable gardens.
- Hunting, fishing, and target shooting are favorite pastimes.
- A large senior population visit doctors and health practitioners regularly.
- However, a largely single population favors convenience over cooking—frozen meals and fast food.
- Home improvement is not a priority, but vehicle maintenance is.

HOUSING

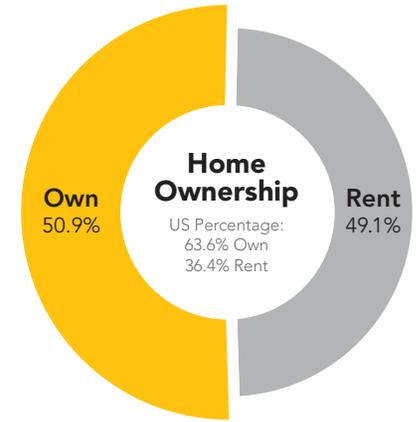
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Typical Housing:
Single Family

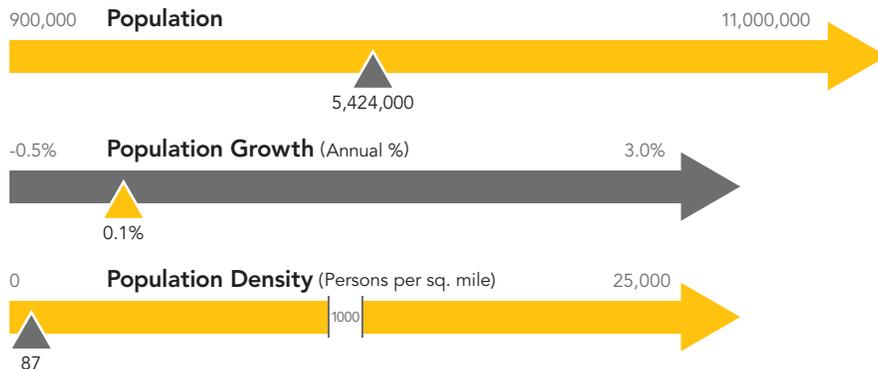
Median Value:
\$88,000

US Median: \$177,000



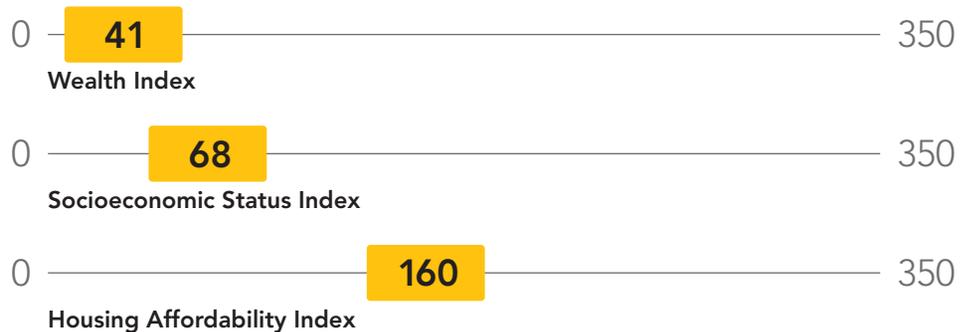
POPULATION CHARACTERISTICS

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ESRI INDEXES

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Small Town Simplicity



SEGMENT DENSITY

This map illustrates the density and distribution of the *Small Town Simplicity* Tapestry Segment by households.

