



Village of Fairport Economic Development Study

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Prepared for:



FAIRPORT OFFICE OF COMMUNITY
AND ECONOMIC DEVELOPMENT



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INTRODUCTION

Background

The Fairport Office of Community and Economic Development (OCED) has engaged the services of Urban Advisors and Highland Planning to develop a Demographic and Economic Conditions Study. The purpose of the study is to assist OCED in developing a future economic development strategy. The study also supports the Comprehensive Planning process, which the Village of Fairport initiated in Summer of 2020. The information in this study information will help inform decision making as OCED plans its next 5-10 years of investment and growth.

Methods

To develop this analysis, we used the following methods and sources:

- **Document and data review.** We reviewed available data and documents about the market in the Village of Fairport, the Town of Perinton, the Rochester Metropolitan Area, Monroe County, and the Core Based Statistical Area. This includes:
 - Review of existing planning studies
 - Review the Village of Fairport's 2007 Comprehensive Plan¹ and the 2012 update²
 - Review of Regional Economic Development Council (REDC) planning documents
 - Analysis of data from the US Census, American Community Survey (ACS), ESRI Business Analyst, the Bureau of Labor Statistics, and the New York State Department of Labor Statistics.
- **Stakeholder interviews.** We gathered additional insights through a series of interviews with key stakeholders.

Analysis Geographies

The Village of Fairport is about nine miles east of the City of Rochester in Monroe County. Geographies used in this analysis include are illustrated in Figure 1 and Figure 2 include:

- Village of Fairport
- Town of Perinton
- Monroe County
- Rochester Metropolitan Statistical Area (MSA)
- USA

¹ www.village.fairport.ny.us/uploads/1/7/6/5/17656211/comprehensive_plan_final_document_for_web.pdf

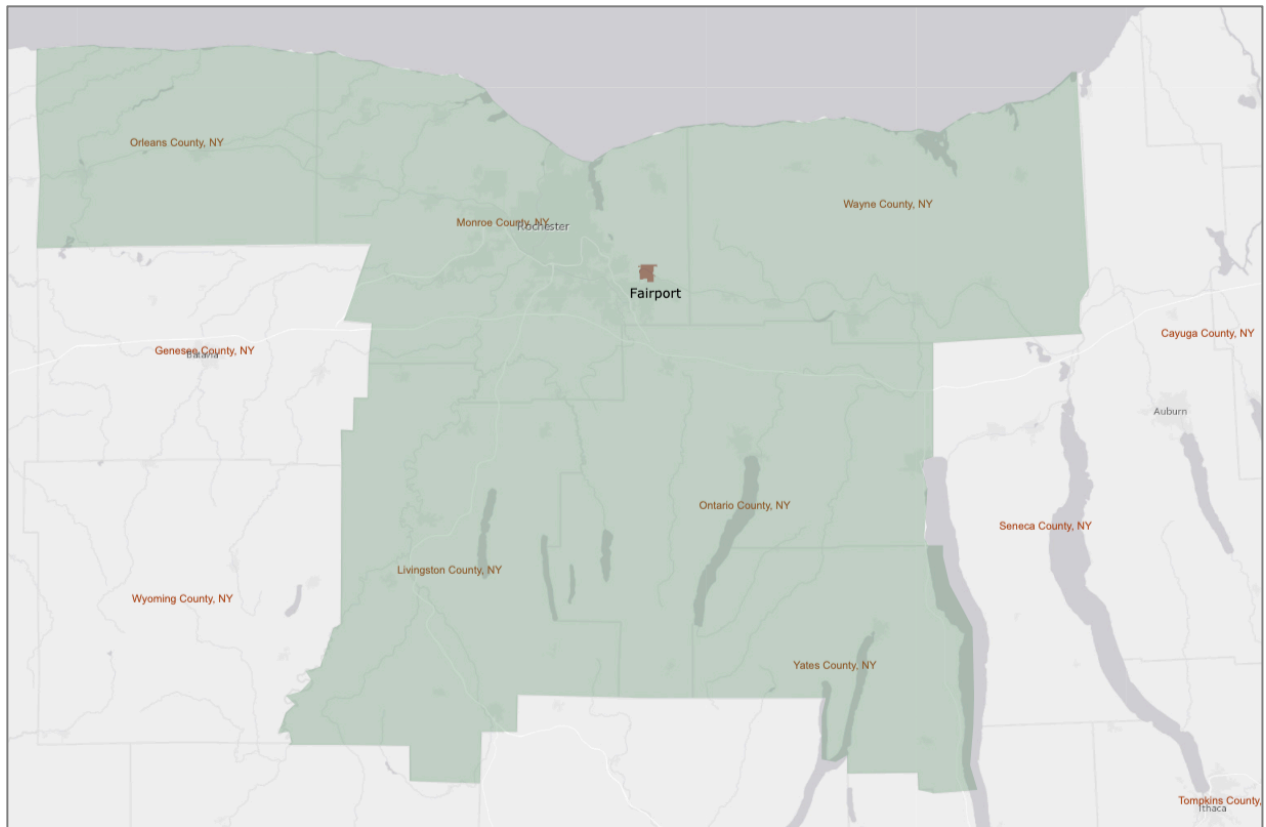
² www.village.fairport.ny.us/uploads/1/7/6/5/17656211/plan_update_june_2012.pdf

Figure 1 Village of Fairport, Town of Perinton, Monroe County



Source: ESRI, 2020

Figure 2 Rochester Metropolitan Statistical Area (MSA)



Source: ESRI, 2020

KEY FINDINGS

The analysis in this report paints a picture of an affluent community of professionals, families, and retirees. While the community is aging, the village contains attractive amenities and some of the most vibrant, walkable neighborhoods in the region--and continues to see demand for high-end housing and commercial services. Below is a summary of key findings. The balance of this report includes a more detailed analysis of the points describe below:

Population growth in the village is slow relative to the county and the region. With an estimated population of 5,514 in 2020, the Village of Fairport has lost almost four percent of its population since 2000. The village experienced the steepest population decline between 2000 and 2010, followed by positive growth between 2010 and 2020, resulting in a net decline of 222 people. During the same time period, from 2000 to 2020, the Town of Perinton and the region experienced positive growth rates of 2.3% to 2.8%. The village and the region are projected to continue growing slowly.

Fairport's population is older, on average, than the region--and is getting older. Residents of Fairport and Perinton are, on average, older than Monroe County and the region as a whole. The proportion of people over 65 is just over 21.4%, which is higher than the county as a whole (18%). The proportion of the population over 65 in Fairport and Perinton is projected to increase, eventually accounting for nearly 25% to 30% of the population. This is consistent with statewide and national trends, as the disproportionate growth of older age groups (known as "aging" or "graying") is expected to continue into the future. By 2030, nearly 20 percent of the US population will be over 65 years old (which is similar to the current age profile in Florida). An aging population will require more services, accessible sidewalks, crosswalks and parking, different types of housing, and more transportation/mobility options.

Fairport residents are highly educated. Of Fairport residents, about 54% have a college degree (bachelors or graduate degree), which significantly higher than Monroe county (38%). For Perinton residents, the proportion with a college degree is nearly 58% putting the town among one of the most educated places in the US.

Fairport households have higher than average incomes. The 2020 median household income in Fairport is \$70,018, higher than Monroe County and the region (\$59,470), but significantly lower than the median for the Town of Perinton (\$90,195). About 40% of Fairport households earn more than \$100,000 compared to 50% in Perinton and 26% in the region.

Fairport may be positioned to capture a portion of growth in the Professional/Technical/Scientific Sectors projected in the region. Although Professional, Scientific and Technical Services are the largest employment category in Perinton, only give percent of those jobs are in Fairport. Fairport lost almost 400 manufacturing jobs between 2007 and 2017, but gained jobs in Retail Trade,

Accommodation and Food services, and Professional Services. Based on its strengths in growing sectors, Fairport is expected to primarily attract jobs in Education and Accommodation and Food Services, as well as in Health Care, which is growing quickly nationally. Given projected regional growth in Professional, Scientific and Technical Services, Fairport may be positioned to capture a portion of that growth.

Opportunities exist to capture a share of workers who commute to Fairport for work from elsewhere in the region. About 187 workers live and work in the village while 2,396 residents commute from Fairport to other places in the region, and 2,706 workers commute in to Fairport from other places. There is no rule of thumb for percentage of residents who live and work in a particular place. But there may be opportunities to increase the proportion of workers who live and work in the village by attracting some of the 2,706 workers who commute to the village from elsewhere in the region. It is notable that people who live and work in the Village, on average, have lower incomes than people commuting in and out of the Village. This underscores the need for neighborhood housing available to workers in food services and retail industries.

The regional retail market is well-served, but opportunities may exist for food serviced and drinking establishments. Both Fairport and Perinton are losing retail sales in General Merchandise, Clothing and Apparel, and Building Materials to other places. With strong attractors like East View Mall and concentrations of shopping centers nearby, it may be difficult to recover these sales although the experience of a main street setting could help small businesses compete. Other categories “leaking” sales to other places include Food Stores and Health and Personal Care. These may be opportunities to provide more convenient options.

Demand for office and professional space will likely be for small spaces. Because of the existing building stock, Fairport can compete for employment uses that require spaces of less than 2,000 square feet, and spaces between 2,000 and 9,000 square feet. While larger firms are often attracted to suburban office parks, smaller firms are typically attracted to quality spaces in a community with unique amenities. Small spaces, including storefronts, are suitable for small-scale manufacturing uses. Small-scale manufacturing is emerging as an innovative strategy for downtown revitalization.

DEMOGRAPHIC CHARACTERISTICS

This section provides an analysis of demographic conditions, including past and projected population growth trends, age, racial make-up, and educational attainment.

Population Growth

Figure 3 shows that Fairport's estimated population in 2020 was approximately 5,514, which represents about 12% of Town of Perinton's population, and less than one percent of Monroe County's population. Between 2000 and 2020, the Village's population declined by about four percent, or 222 people, while the Town of Perinton grew by 2.3% and the MSA grew by 2.8%. The Village's population decline occurred primarily between 2000 and 2010, when the Village lost 383 residents. Between 2010 and 2020, it is estimated that the village gained population but has not recovered its 2000 population levels. ESRI projections show a slowing (flat) growth rate in the village through 2025 (Figure 4).

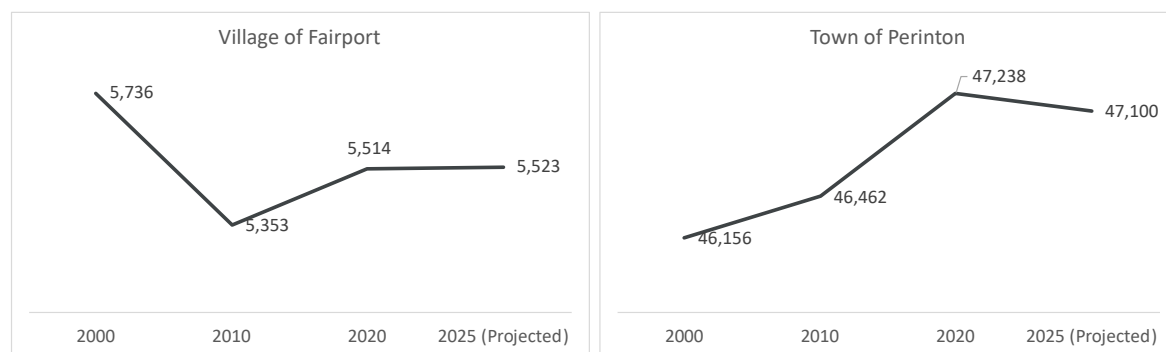
Figure 3 Population Change, 2000 - 2025

	Village of Fairport	Town of Perinton	Monroe County	Rochester MSA
2000 Population	5,736	46,156	735,343	1,062,452
2010 Population	5,353	46,462	744,344	1,079,671
2020 Population	5,514	47,238	754,473	1,092,233
2025 Population (Projected)	5,523	47,100	752,401	1,087,854
Absolute Change 2000-2020	-222	1,082	19,130	29,781
Total % change 2000-2020	-3.9%	2.3%	2.6%	2.8%
AAGR 2000-2020	-0.19%	0.12%	0.13%	0.14%

Source: ESRI, 2020

Note: AAGR = Average Annual Growth Rate

Figure 4 Population Change, Village of Fairport and Town of Perinton

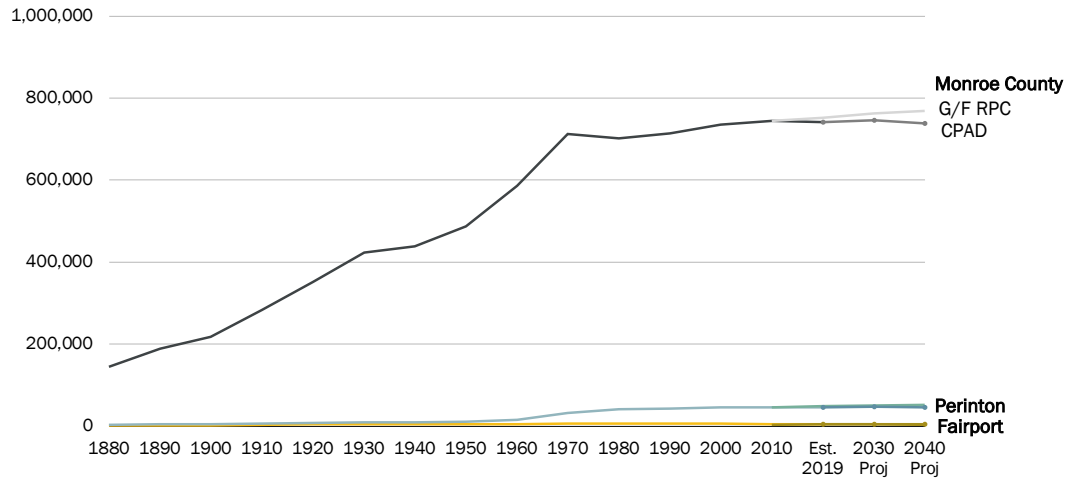


Source: ESRI 2020

Figure 5 shows historical population change since 1880 and future projections through 2040 for Fairport, Perinton and Monroe County. According to two population projections (Cornell PAD and Genesee Finger Lakes Regional Planning Council), total population growth in Monroe County is

expected to remain flat or decline through 2040, continuing a trend that began in the 1980s when population growth in the region slowed.

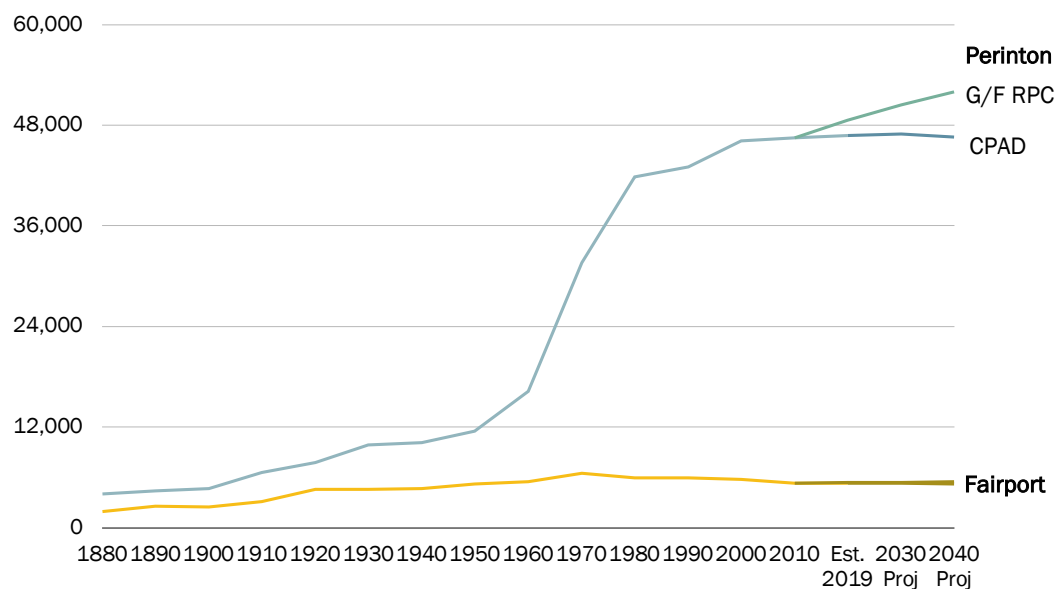
Figure 5 Population, 1880-2040



Source: US Census Bureau, Genesee/ Finger lakes Regional Planning Council 2013, Cornell PAD, Urban Advisors

Figure 6 shows historical population change and future projections in Fairport and Perinton. While Cornell PAD projects that growth in Perinton and Fairport will remain flat, the Genesee/Finger Lakes Regional Planning Council projects continued growth in Perinton.

Figure 6 Population, 1880-2040, Village of Fairport and Town of Perinton

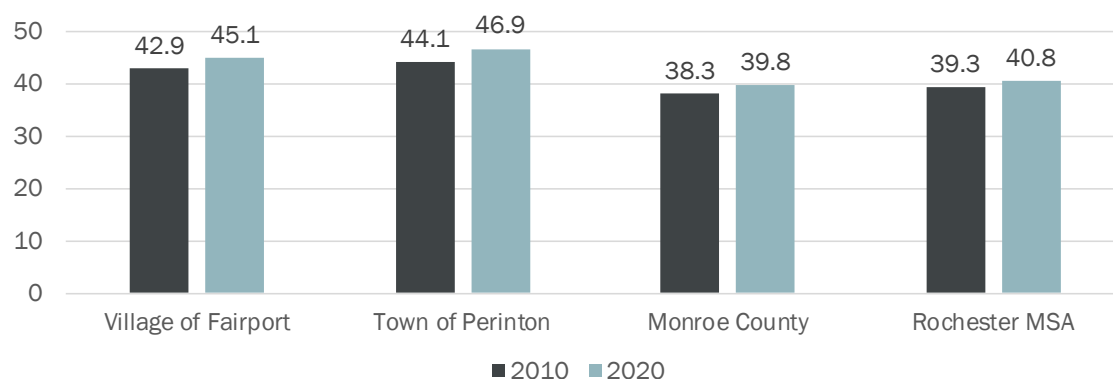


Source: US Census Bureau, Genesee/ Finger lakes Regional Planning Council 2013, Cornell PAD, Urban Advisors

Age

The age characteristics of a community are important to consider when exploring potential future growth and developing strategies for economic development. Age distribution can help determine how best to allocate future resources and public services to best accommodate future residents. Figure 7 and Figure 8 summarize the median age and age distribution for Fairport, Perinton, Monroe County, and the Rochester MSA. On average Fairport is older than the region, but slightly younger than Perinton. For all geographies analyzed, the median age increased between 2010 and 2020.

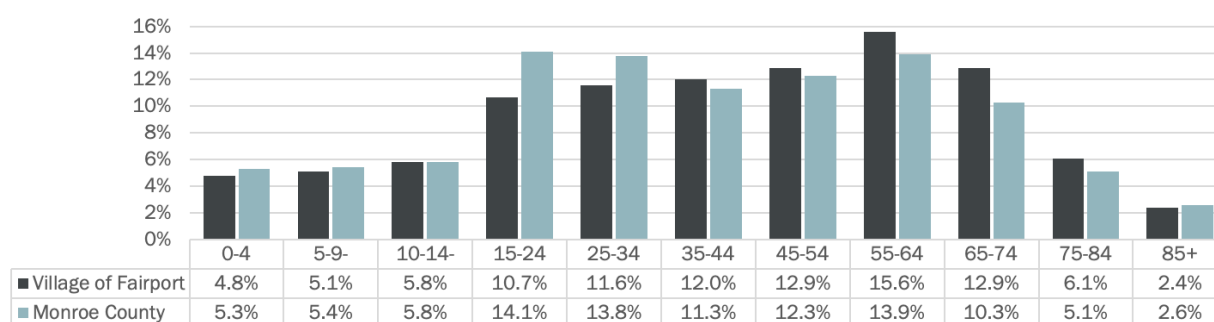
Figure 7 Median Age, 2010-2020



Source: US Census, ESRI

The age distribution in Fairport is consistent with a family-oriented suburban community. The largest age cohorts are made up of residents between 35 and 64, followed by young people 15 to 34. About 21 percent of the village population is over the age of 65.

Figure 8 Age Distribution, 2020, Village of Fairport

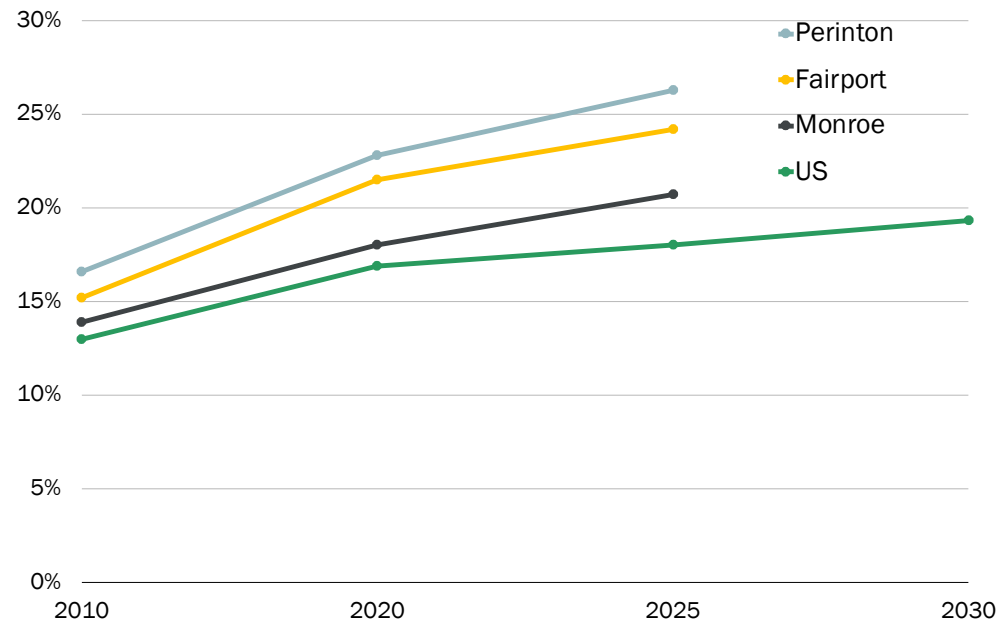


Source: ESRI, 2020

Fairport is slightly older, on average, than the region, and the village is tracking national trends towards an aging population. The age profile of Fairport is comparable with the age profile of Florida (Figure 10). The nation is in the midst of a period of large demographic shift as the baby boom generation ages. Between 1990 and 2010, 78 percent of net household change was in the 35-64-year-old age group. From 2010 to 2030, projections suggest 74 percent of net change will

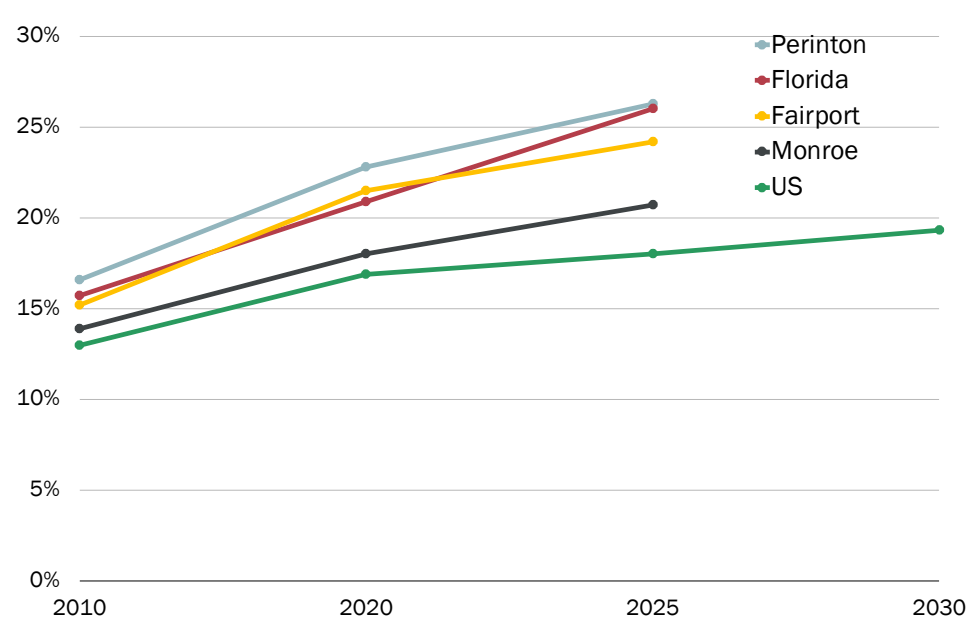
be in the 65+ age group. The coming years will see a significant increase in the percent of the population over 65. This will affect many aspects of a community, particularly demand for housing and medical services.

Figure 9 Population over 65 years, 2010-2040



Source: ESRI, Urban Advisors

Figure 10 Population over 65 years, 2010-2040



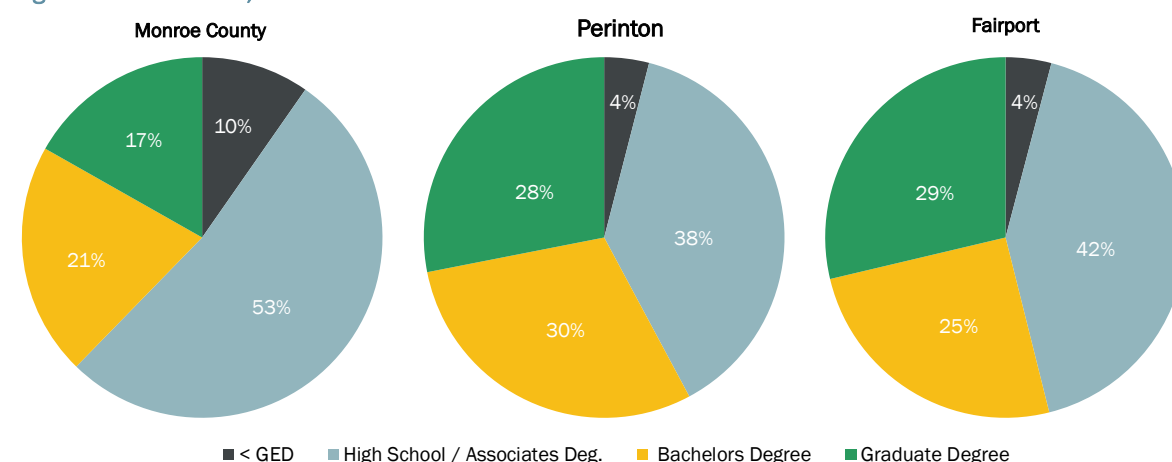
Source: ESRI, Urban Advisors

Educational Attainment

Education statistics may be used by policy makers to determine the types of policies and services that will be needed in the short- and long-term. Education is also closely related to income and the education level of a community is an important economic and health indicator in the following ways: (1) an educated population is an attractive feature to businesses looking for a qualified workforce, (2) a better educated population can more easily adapt to changing economic environments and employment needs, and (3) highly educated populations are healthier and live longer.³ Studies also suggest that education is correlated with better health outcomes and quality of life. People with higher educational attainment have shown less anxiety and depression and are less likely to have serious health conditions.⁴

Of Fairport residents, about 54 percent have a college degree (bachelors or graduate degree), which is significantly higher than Monroe county (38%). For Perinton residents, the proportion with a college degree is nearly 58 percent, putting the town among the most educated places in the US.

Figure 11 Education, 2018



Source: US Census, Urban Advisors

³ "Educational Attainment and Adult Mortality in the United States: A Systematic Analysis of Functional Form," *Demography* 49, no. 1 (2012)

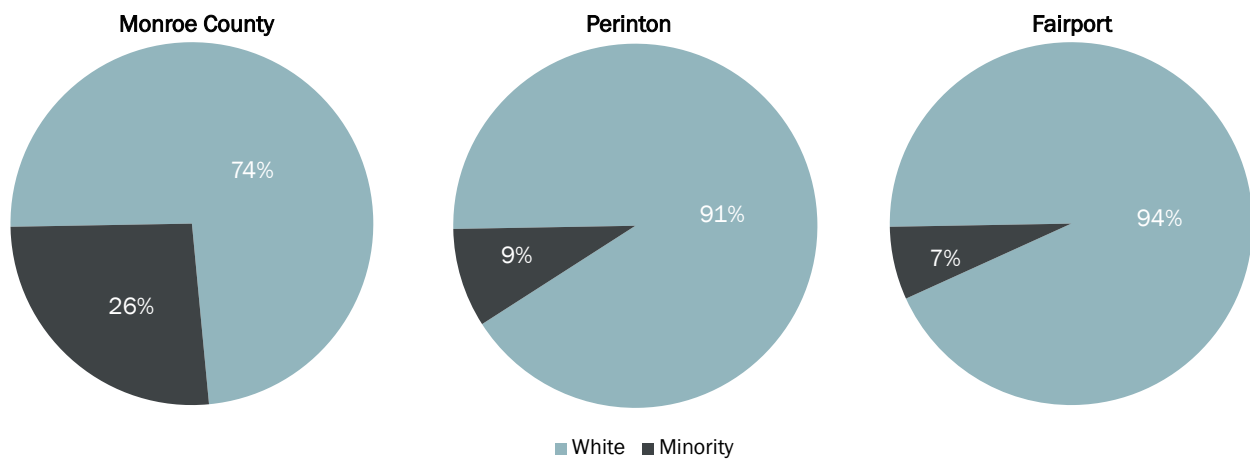
⁴ "The Effects of Education on Health," *National Bureau of Economic Research*

Race and Ethnicity

Tracking the diversity of a community is a useful way to understand the shifting make-up of race and ethnicity. As the region and the nation become more diverse, so will the preferences and needs of the population. It will be important to consider how future economic policies can help meet the needs of a dynamic population and continue to attract talented and creative people. Figure 9 summarizes the racial/ethnic composition of the village, relative to the region.

The minority population in the Village of Fairport makes up approximately seven percent of the total population, compared to nine percent in Perinton and 26% in Monroe County. The Hispanic population in Fairport is about 3.5%, compared to 3.3% in Perinton and 9.6% in Monroe County.

Figure 12 Ethnicity, 2020



Source: US Census, ESRI & Infogroup, & Urban Advisors

MARKET AND ECONOMIC CHARACTERISTICS

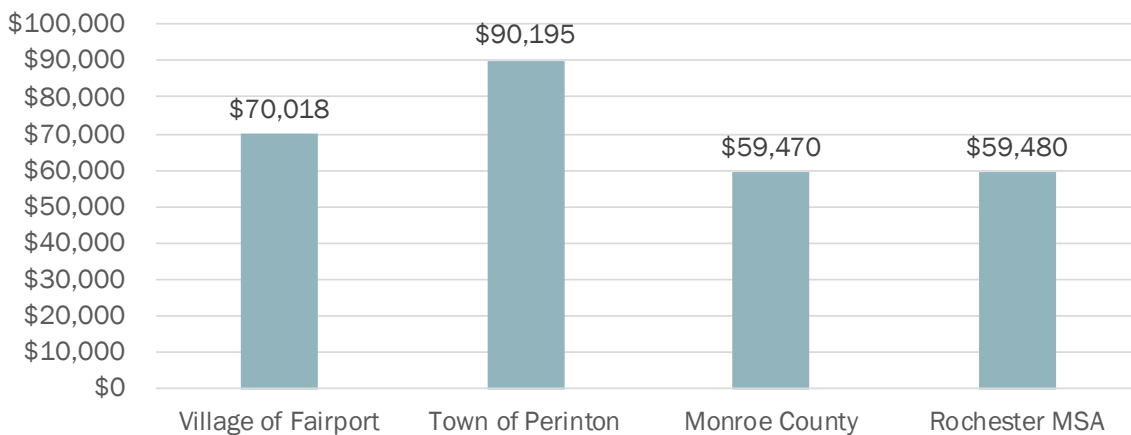
This section provides an analysis of economic conditions within the Village of Fairport relative to the Town of Perinton, Monroe County, the Rochester MSA, and national trends.

Income

Household and Per Capita income are key economic indicators, as changes in both personal and household income can reflect economic growth or decline in an area. Comparisons between the village and surrounding areas can also help decision makers understand the economic well-being of a community and whether the regional economy adequately supports residents. Income is just one measure of a community's economic well-being.

The 2020 median household income in the Village of Fairport was \$70,018, higher than Monroe County (\$59,470) and the Rochester MSA (\$59,480), but significantly lower than the median household income for the Town of Perinton (\$90,195).

Figure 13 Median Household Income, 2020



Source: ESRI, 2020

Figure 14 shows the distribution of income for households in Fairport and Perinton. The largest proportion (about 23%) of households in Fairport earn between \$100,000 and \$149,000. The second largest proportion of households (22%) earns between \$50,000 and \$74,000.

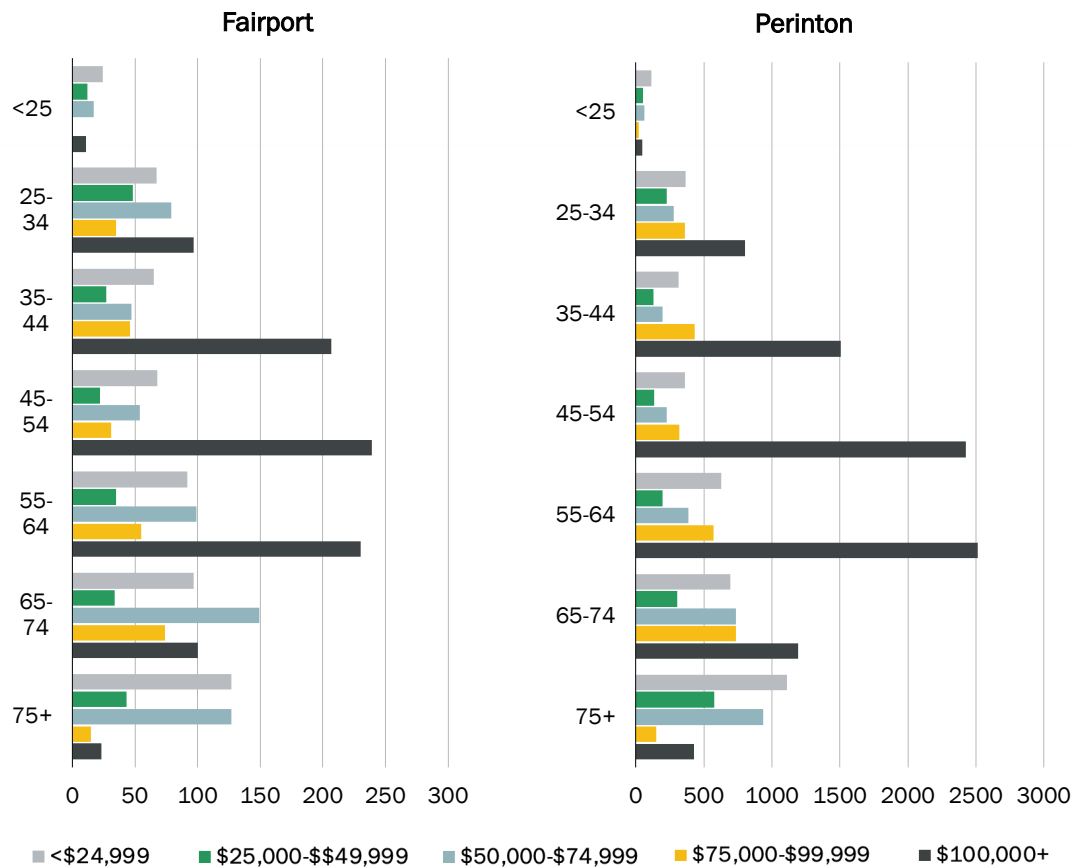
Figure 14 Households by Income, 2020, Fairport and Perinton



Source: ESRI, US Census Bureau, Highland Planning

Figure 15 shows the distribution of household income by age group in Fairport and Perinton. It is notable that Fairport and Perinton have large proportions of households earning higher incomes (over \$100,000) in *all* age groups.

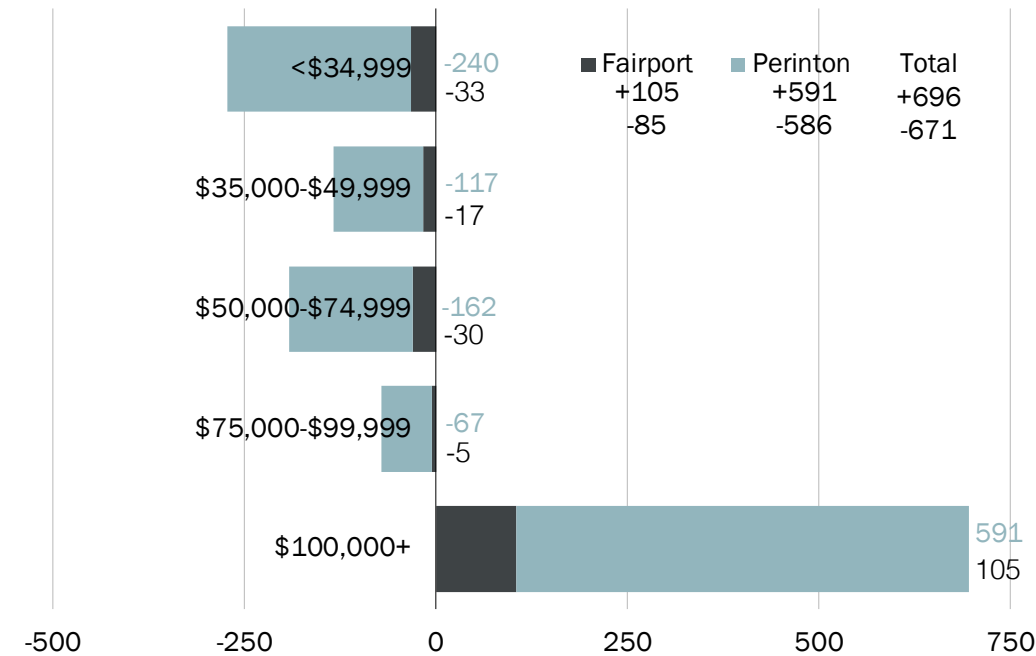
Figure 15 Household Income by Age, 2020



Source: Urban Advisors

Figure 16 shows the projected growth in the number of households, categorized by household income, through 2025. Projections through 2025 show that the biggest shifts in income over the next five years will be an increase in the share of households earning \$100,000 or more in all age groups. This suggests that households earning middle and lower incomes are projected to decrease in the village over the next five years. An increase in higher income households within all age groups may have larger implications for the local real estate market, by putting pressure on the existing supply (i.e. adaptive reuse/rehab) or encouraging more intense development of existing (i.e. “scrape-offs”). Maintaining economic diversity may require proactive economic development policies to prevent gentrification and displacement, while ensuring there are housing opportunities for households in lower income segments.

Figure 16 Projected Number of Households by Household Income, 2020-2025



Source: ESRI & Infogroup, & Urban Advisors

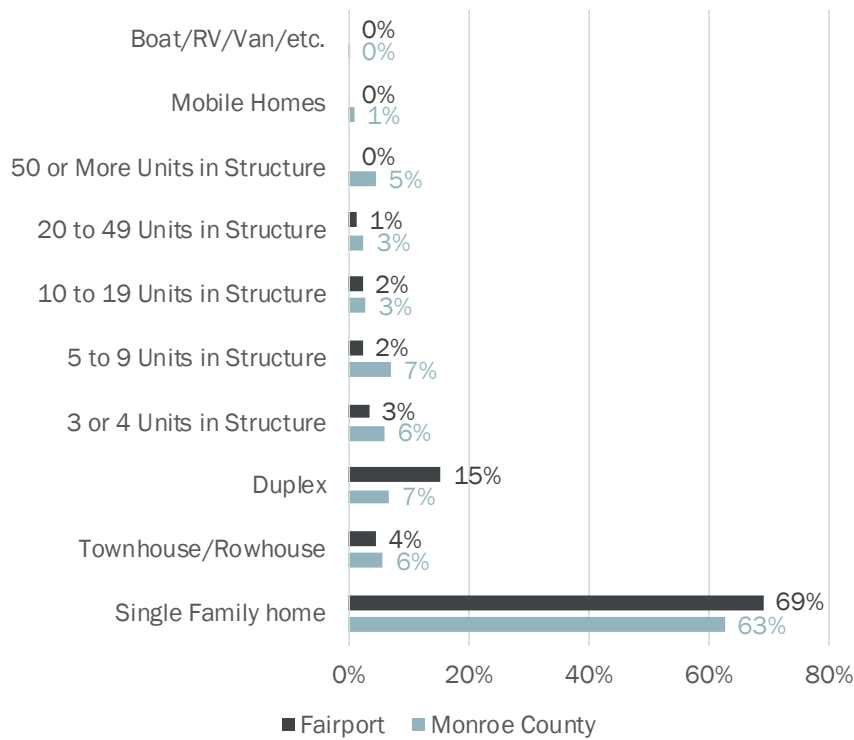
Note: Horizontal axis represents number of households

Housing Characteristics

Housing characteristics and trends are important to understand when developing economic development strategies and policies to address the community's future needs for senior housing, rental housing, or affordable housing. This section describes the total number of housing units, tenure, housing values, and other trends associated with housing in the village.

In 2020, there were an estimated 2,586 housing units in the Village of Fairport, of which about 67% are owner-occupied. Figure 17 shows the breakdown of housing units by type in the Village of Fairport and Monroe County. Almost 70% of housing units in Fairport are detached single-family homes, compared to 63% county-wide. Duplexes make up a larger share of the housing stock in Fairport (15%) than the county as a whole (7%), while structures with more than three units make up a small share of the housing stock in Fairport than county-wide. In general, Fairport has fewer multi-family housing options than the county as a whole.

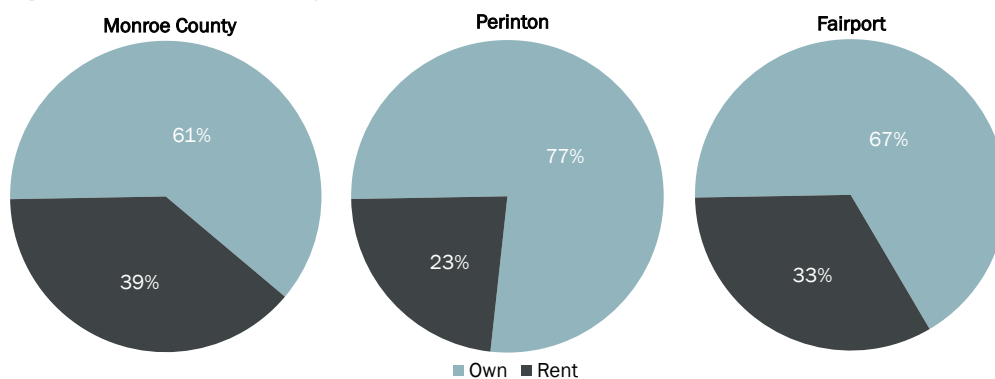
Figure 17 Housing Units by Type, 2020



Source: ESRI, Highland Planning

Figure 18 shows housing tenure (home-owners relative to renters). Fairport and Perinton both have a higher proportion of units that are owner-occupied than the county as a whole. In Perinton, about 77% of housing units are owner-occupied, compared to 67% in Fairport and 61% county-wide.

Figure 18 Home Ownership, 2020

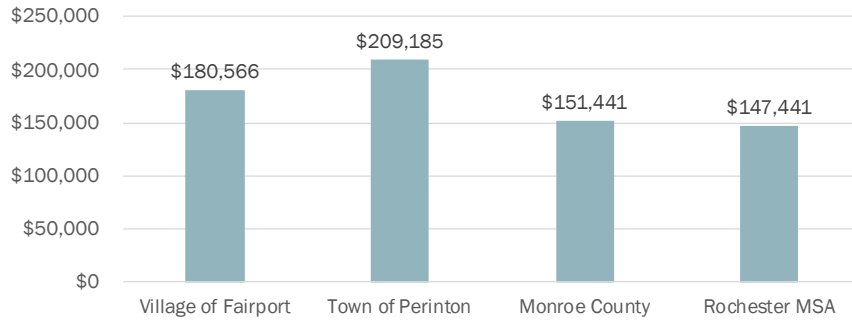


Source: US Census, ESRI & Infogroup, & Urban Advisors

Figure 19 shows the median home value in 2020. The median home value in the Village of Fairport was \$180,566, which is higher than Monroe County (\$151,441) and the metropolitan region (\$147,441), but lower than the median for the Town of Perinton (\$209,185). Figure 20 shows the distribution of home value in Fairport, Perinton and Monroe County. The largest proportion of

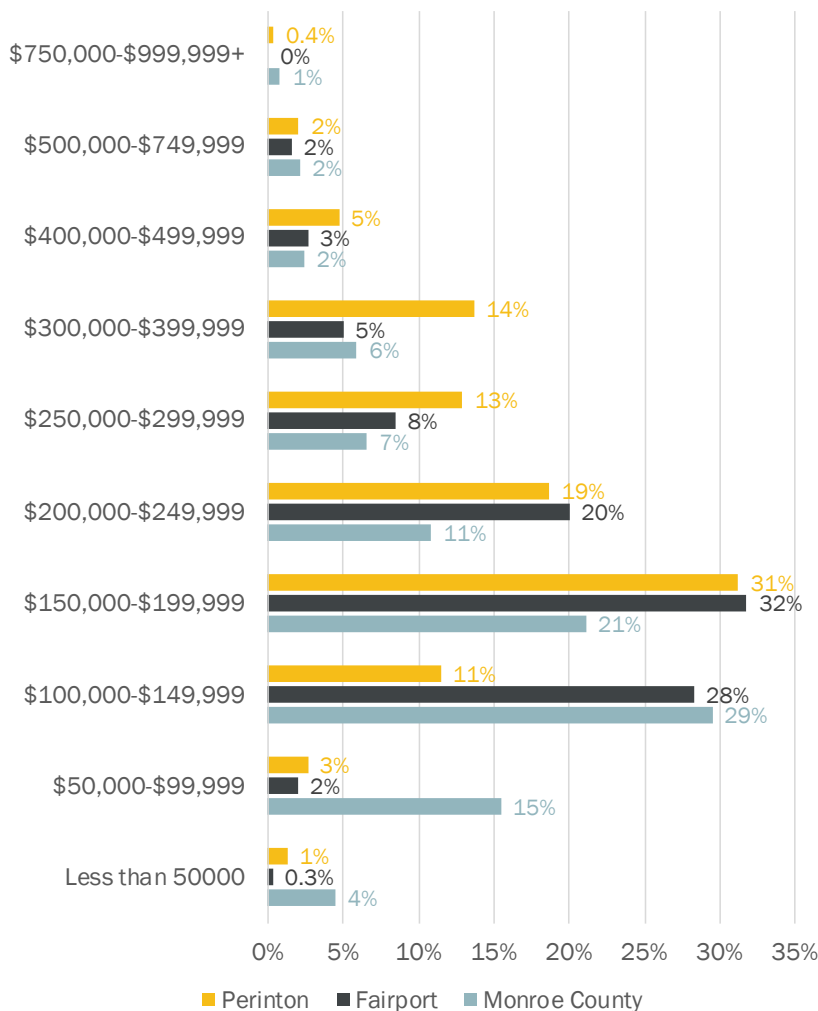
homes in Fairport fall into the \$100k to \$200k range, while Perinton includes a larger proportion of homes with higher values (above \$250k) and Monroe County includes a higher proportion of lower value homes (i.e. below \$100k).

Figure 19 Median Home Value, 2020



Source: ESRI, 2020

Figure 20 Home Value Distribution, 2020

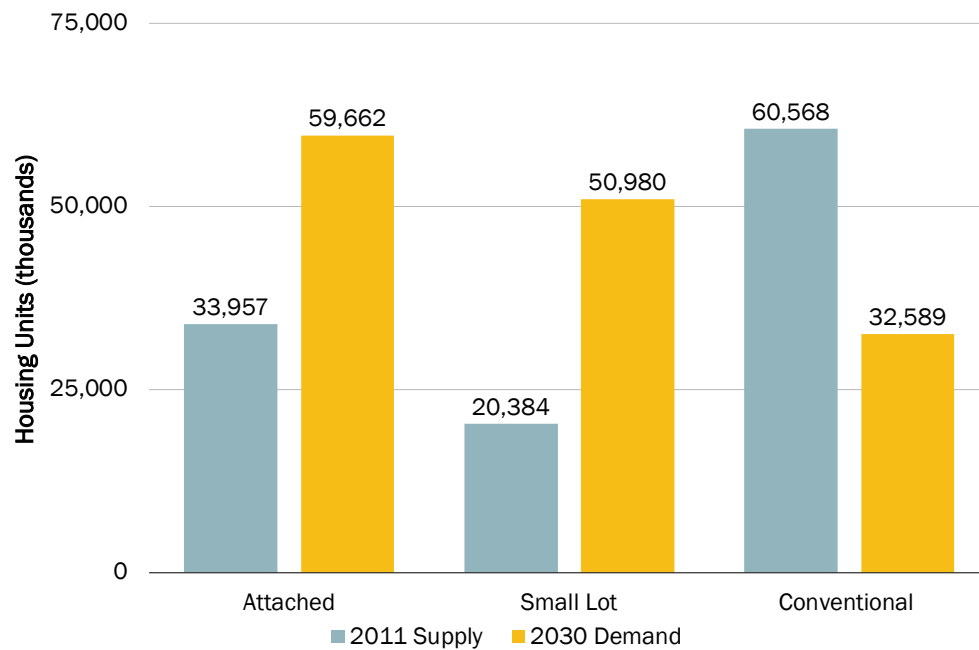


Source: ESRI, Highland Planning

As households age, their housing needs and preferences change. From 1990 to 2010, about 77 percent of the market was in its “peak” home owning phase of life. From 2010 to 2030, 74 percent will be interested in downsizing.

The US market for housing is already inefficient, having built far more conventional single-family houses than other products the market would have preferred. A 2011 owner survey and analysis of US housing stock found that while 25 percent of homeowners preferred large, conventional lots, 52 percent of the market was allocated to those products instead of small lot housing and multifamily units. Comparing the existing (2011) housing stock to the projected 2030 demand by life-mode, we anticipate an oversupply of conventional, large lot single family houses and a demand for small lot houses (less than 1/6 acre- as built in historic town neighborhoods) and apartments.⁵

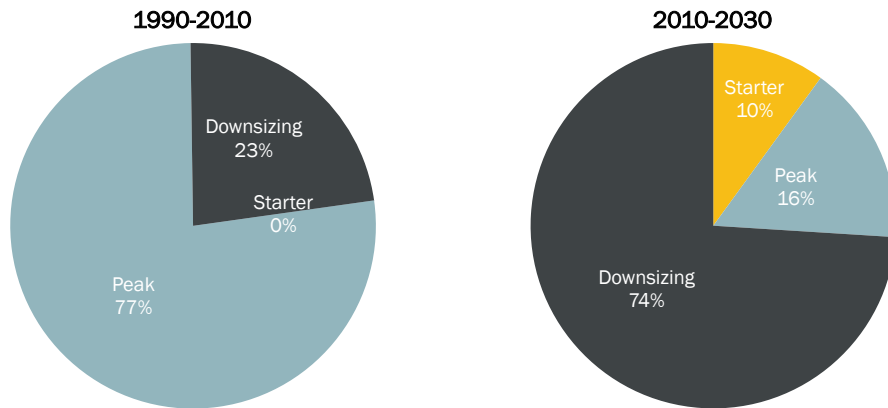
Figure 21 2011 Housing Supply vs 2030 Housing Demand, United States



Source: Arthur C. Nelson, *Reshaping Metropolitan America* (2013)

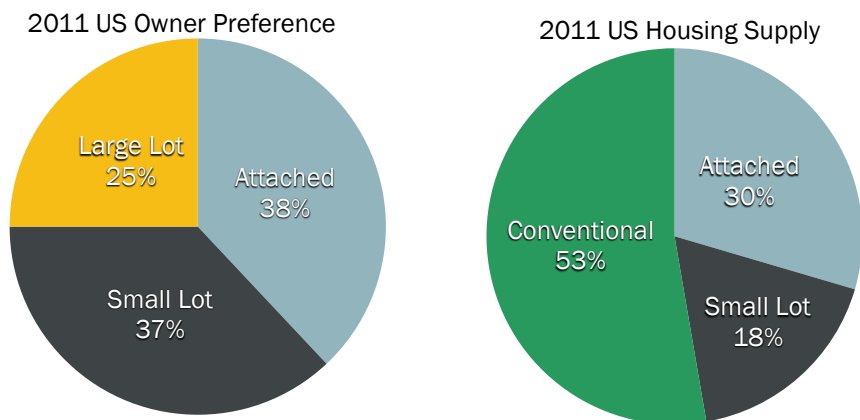
⁵ “Reshaping Metropolitan America” by Arthur C. Nelson (2013)

Figure 22 Market Share of Householders, 1990—2030, United States



Source: Arthur C. Nelson, *Reshaping Metropolitan America* (2013)

Figure 23 Housing Preference vs Housing Supply, 2011, United States



Source: Arthur C. Nelson, *Reshaping Metropolitan America* (2013)

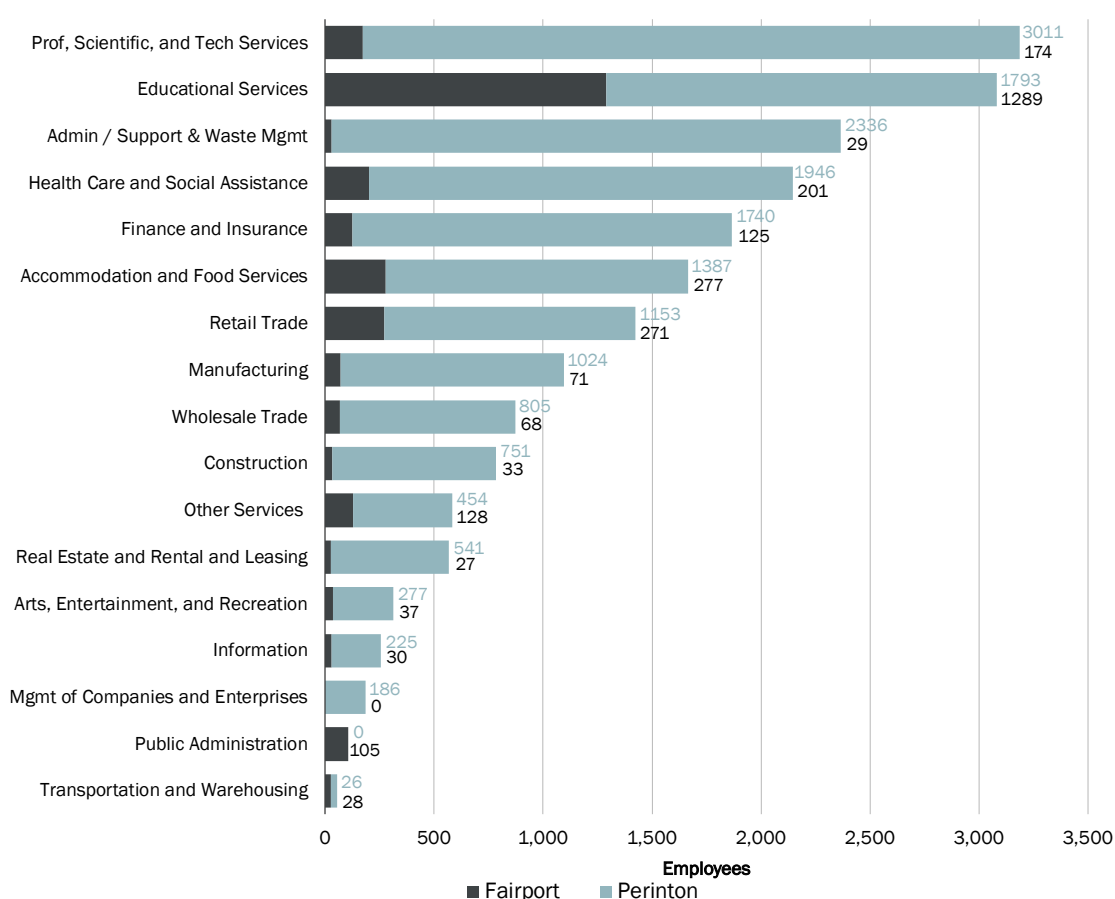
Employment

While many factors influence growth and change in a community, employment can have a significant impact on the local economy and quality of life. Understanding which industries and businesses provide the largest proportion of jobs in the larger region and the village can help better understand community's dependence on certain industries or companies. Many factors that influence change in a community come from outside forces, such as regional, state, and national trends. Likewise, regional and national economic trends can be less visible or less direct than local trends, but they have a significant impact on the economic activity in smaller geographies like the Village of Fairport. While national trends cannot be applied directly to a small area like a village, we can extract meaningful information to help provide context about the type of employment in the

community and how that may affect future planning. A closely related factor is commuting patterns and the proportion of residents who live and work in a particular geography, such as the village.

There were an estimated 2,858 employees (population over 16 years) working in the Village of Fairport in 2020, with a 9.7 percent unemployment rate. Figure 24 shows the industries that employ the largest proportion of village employees. Education Services dominates employment in Fairport. It is important to note that the village is home to the school district administrative offices, which claims employees who actually work outside the village. The Village of Fairport holds over 40 percent of Education sector jobs in the town of Perinton. Although Professional, Scientific and Technical Services are the largest employment category in Perinton, only 5 percent of those jobs are in Fairport.

Figure 24 Employment by Industry, 2017, Village of Fairport and Town of Perinton

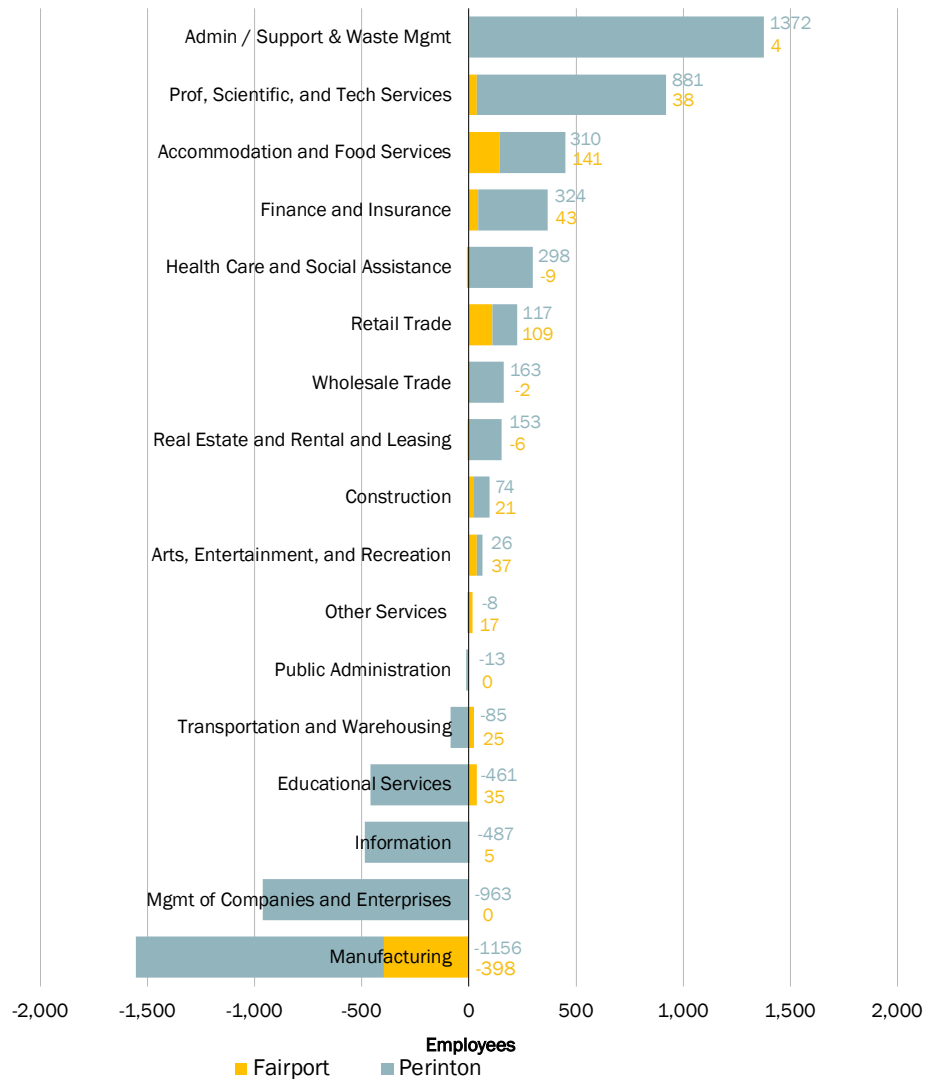


Source: U.S. Census Bureau, LEHD Origin-Destination Employment Statistics & Urban Advisors

The 2007-2017 period saw a contraction in Manufacturing employment in both Fairport and Perinton (refer Figure 25). Fairport lost almost 400 Manufacturing jobs between that period. Perinton also lost jobs in Management of Companies and Enterprises. Nonetheless, Fairport

observed a small growth in Accommodation & Food Services and Retail Trade. Perinton added jobs in Administration and Support & Waste Management and Professional, Scientific and Technical Services.

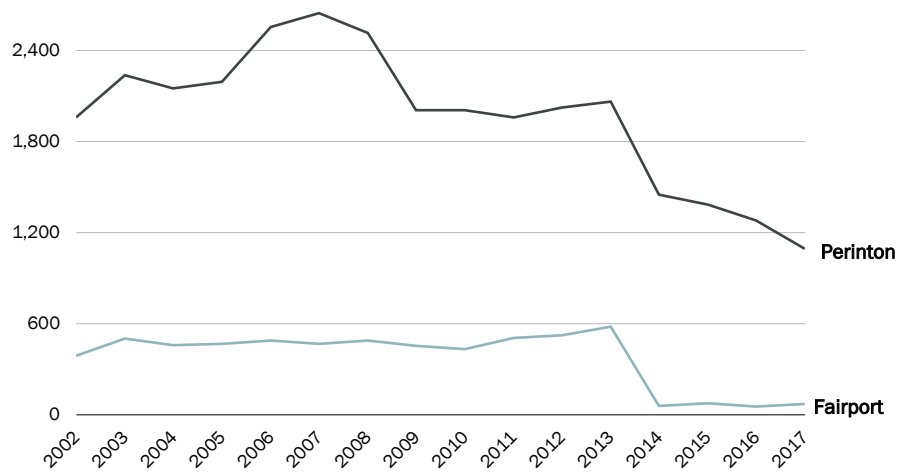
Figure 25 Change in Employment, 2007-2017, Fairport and Perinton



Source: U.S. Census Bureau, LEHD Origin-Destination Employment Statistics & Urban Advisors

Perinton has experienced a longer, slower decline in Manufacturing industry with noticeable events in 2007 and 2013. The 2013 event appears to be the same as in Fairport where the data suggest a closure shifted the industry.

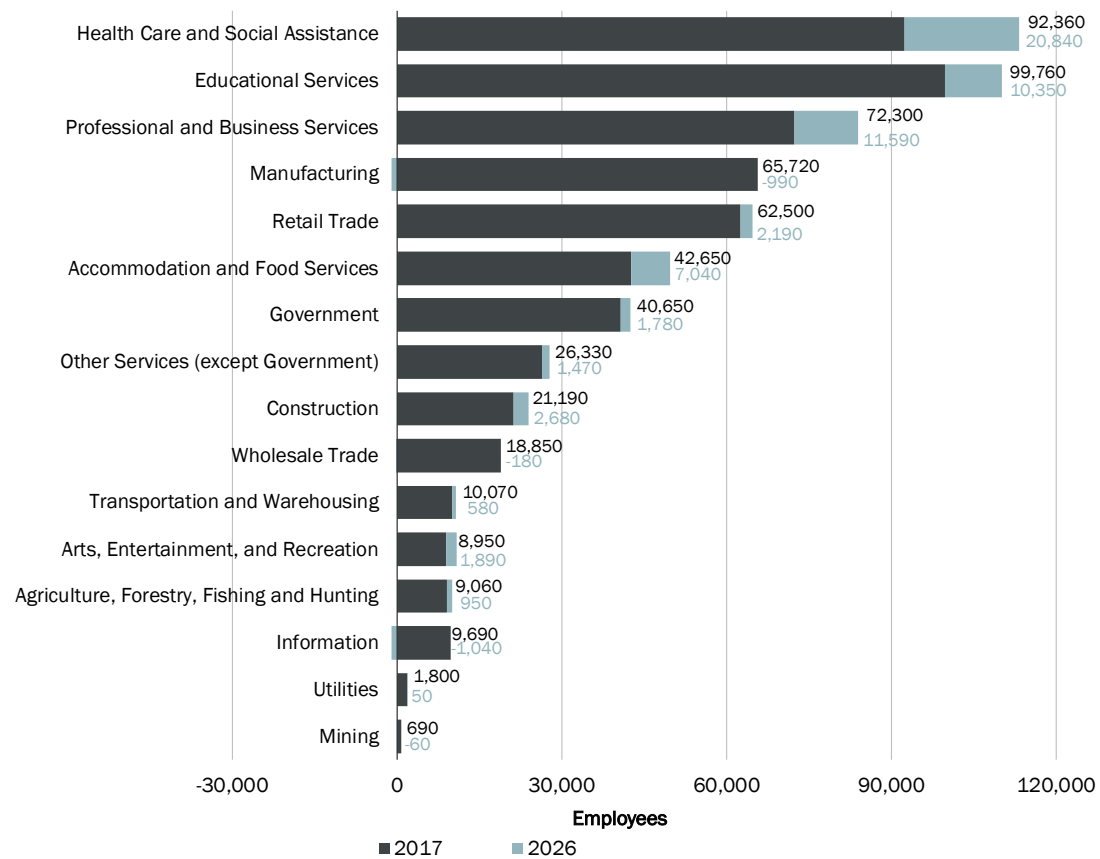
Figure 26 Manufacturing Employment, 2002-2017, Fairport and Perinton



Source: U.S. Census Bureau, OnTheMap and LEHD Employment Statistics, & Urban Advisors

In the Finger Lakes region, Healthcare, Education, and Professional & Business Services are the largest employment categories and also are projected to show the greatest growth.

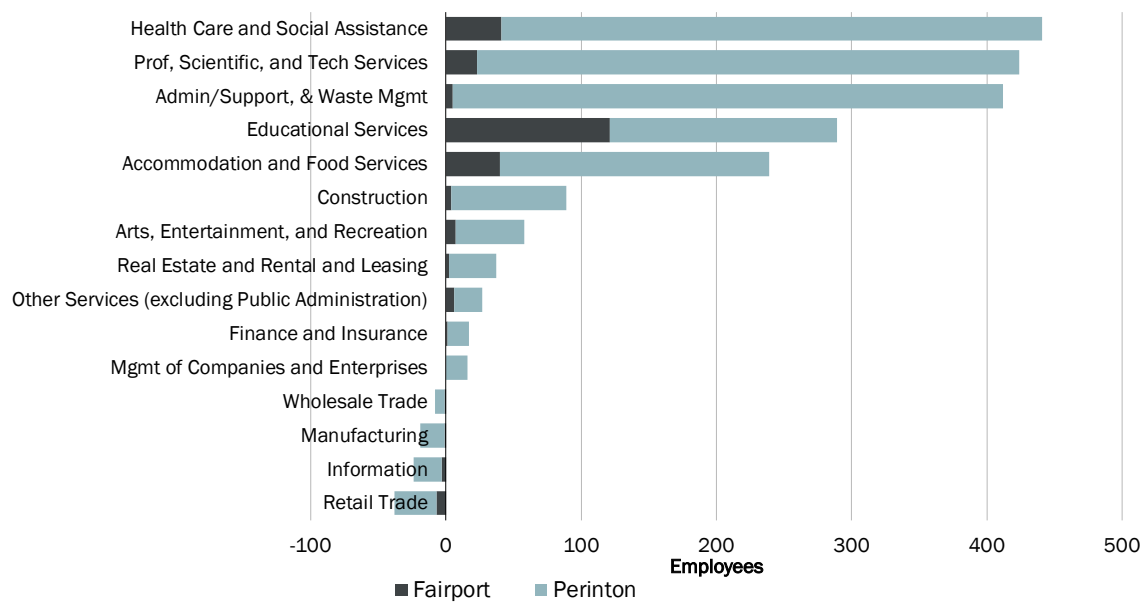
Figure 27 Employment by Industry, 2017-2026, Finger Lakes Region



Source: New York State Department of Labor & Urban Advisors

Based on the strengths in growing sectors, Fairport is expected to primarily attract jobs in Education and Accommodation and Food Services, as well as in Health Care that is growing quickly nationally. Whereas the rest of Perinton is expected to see strong growth in Professional Services, and Administration. There may be opportunities for Fairport to capture a larger than projected share of growth in the town as a whole.

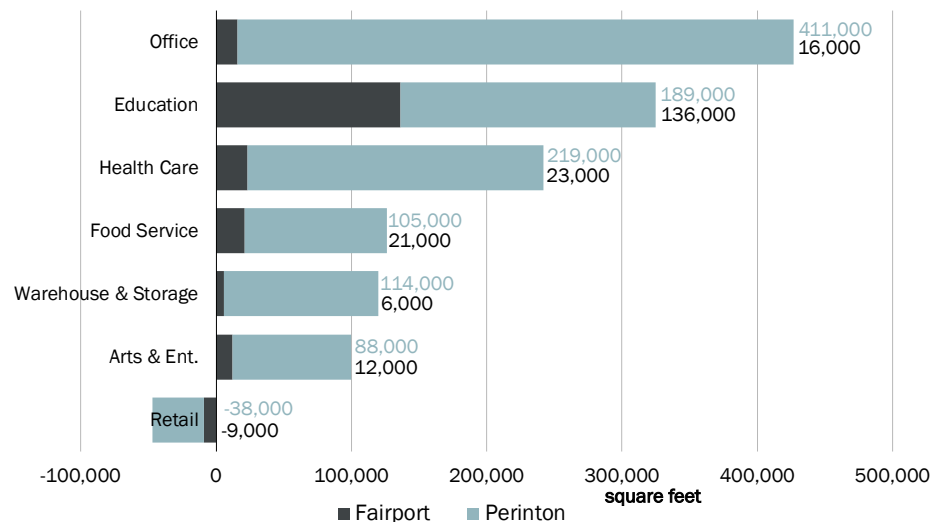
Figure 28 Projected Change in Employment, 2017-2026, Fairport and Perinton



Source: U.S. Census Bureau, LEHD Origin-Destination Employment Statistics, NYS Dept Labor & Urban Advisors

Reflecting the current concentration of Education employment in Fairport, the largest demand for space is projected in this category. Both Perinton and Fairport may see a reduced demand for retail space. Over the next decade there is a projected demand for office space in Perinton of over 500,000 square feet. Much of the office space is likely to be for the Scientific, Professional and Technical sector.

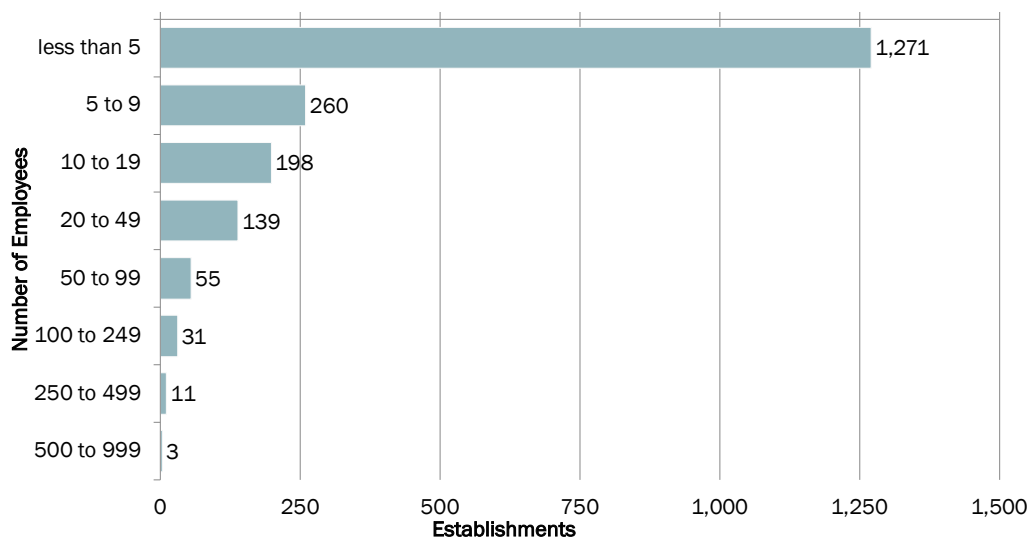
Figure 29 Net Demand for Employment Space, 2017-2026, Fairport and Perinton



Source: U.S. Census Bureau, LEHD Origin-Destination Employment Statistics, NYS Dept Labor, US Energy Information Administration 2012 & Urban Advisors

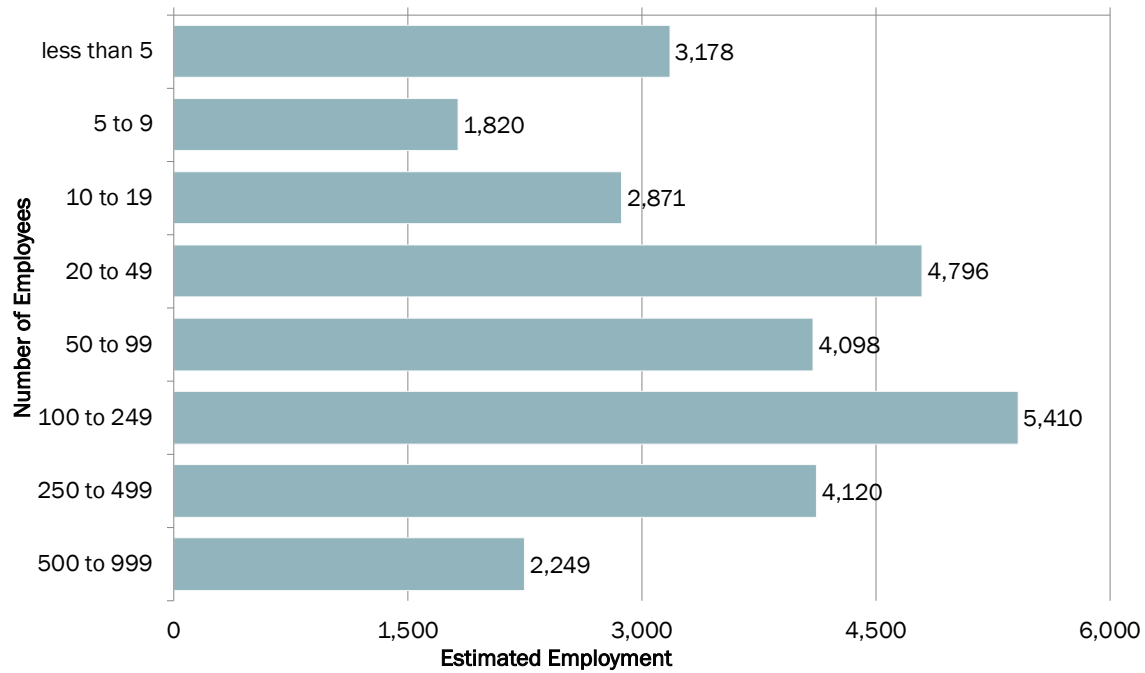
In Monroe County, there are numerous smaller firms in addition to a few large ones. Using the average of the size ranges, the number of employees in each establishment range was estimated. This estimate suggests that there is a relatively even spread of workers in a range of establishment sizes. Small firms are estimated to significantly contribute to the total employment of the Scientific, Professional and Technical sector.

Figure 30 Professional, Scientific and Technical Estimated Establishments by Number, 2018, Monroe County



Source: U.S. Census Bureau, County Business Patterns & Urban Advisors

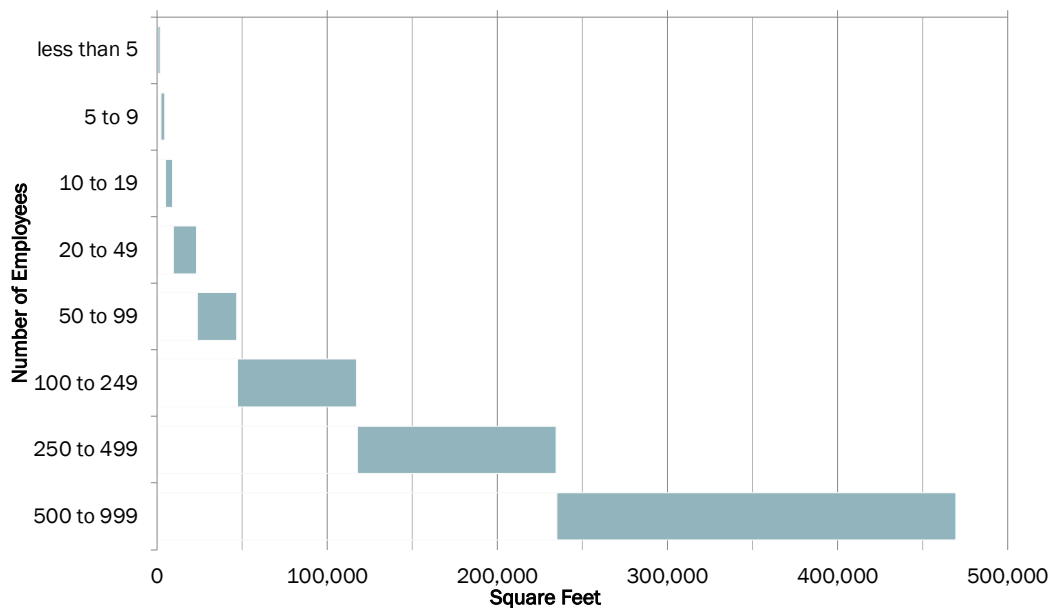
Figure 31 Professional, Scientific and Technical Estimated Employment by Establishment Number of Employees, 2018, Monroe County



Source: U.S. Census Bureau, County Business Patterns & Urban Advisors

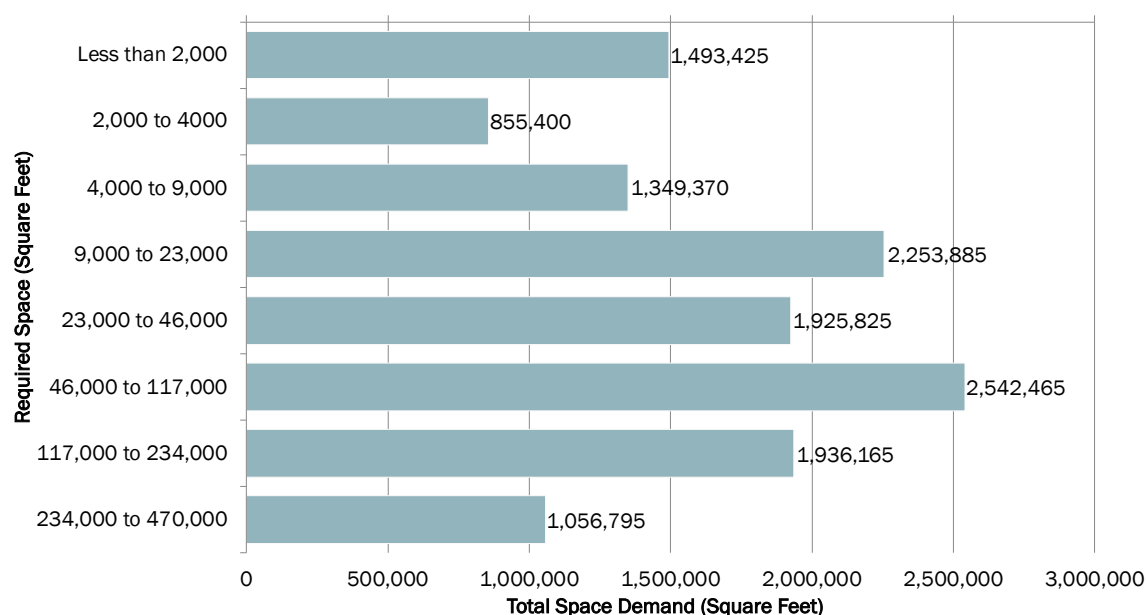
Large establishments need lots of space. They are the big fish that development pays close attention to. But the volume of space required is balanced across a range.

Figure 32 Estimated Required Office Space per Establishment



Source: U.S. US Energy Information Administration 2012 & Urban Advisors

Figure 33 Estimated Required Space per Professional, Scientific and Technical Establishment



Source: U.S. US Energy Information Administration 2012 & Urban Advisors

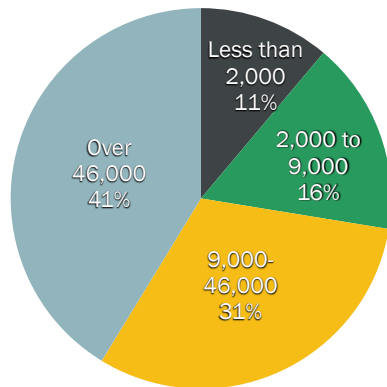
Fully 11 percent of space for Scientific, Professional and Technical firms are likely to be in spaces that are less than 2,000 square feet and 16 percent in spaces that are 2,000 to 9,000 square feet. This is a market where Fairport can compete without requiring large new buildings. Because of the existing building stock, Fairport can compete for employment uses that require spaces of less than 2,000 square feet, and spaces between 2,000 and 9,000 square feet. While larger firms are often attracted to suburban office parks, smaller firms are typically attracted to quality spaces in a community with unique amenities. Small spaces, including storefronts, are suitable for small-scale manufacturing uses.

Small-scale manufacturing is an umbrella term that refers to all types of small businesses that produce tangible goods. This includes textiles, hardware, woodworking, metalworking, and 3Dprinting. It also includes hardware prototyping, consumer product design and prototyping, breweries and distilleries, and local food production and packaging. The businesses may be consumer-facing or provide products to other businesses and often have 1-30 employees.⁶

According to Smart Growth America, small-scale manufacturing is emerging as an innovative strategy for downtown revitalization. Small-scale manufacturers draw foot traffic and help fill retail spaces that are difficult to lease or are vacant. Proprietors of small-scale manufacturing businesses often become powerful “brand ambassadors” for their communities.

⁶ *Made in Place: Small-Scale Manufacturing and Neighborhood Revitalization*, Smart Growth America

Figure 34 Estimated Demand for Prof. Sci. and Tech. Office Space by Establishment Required Space



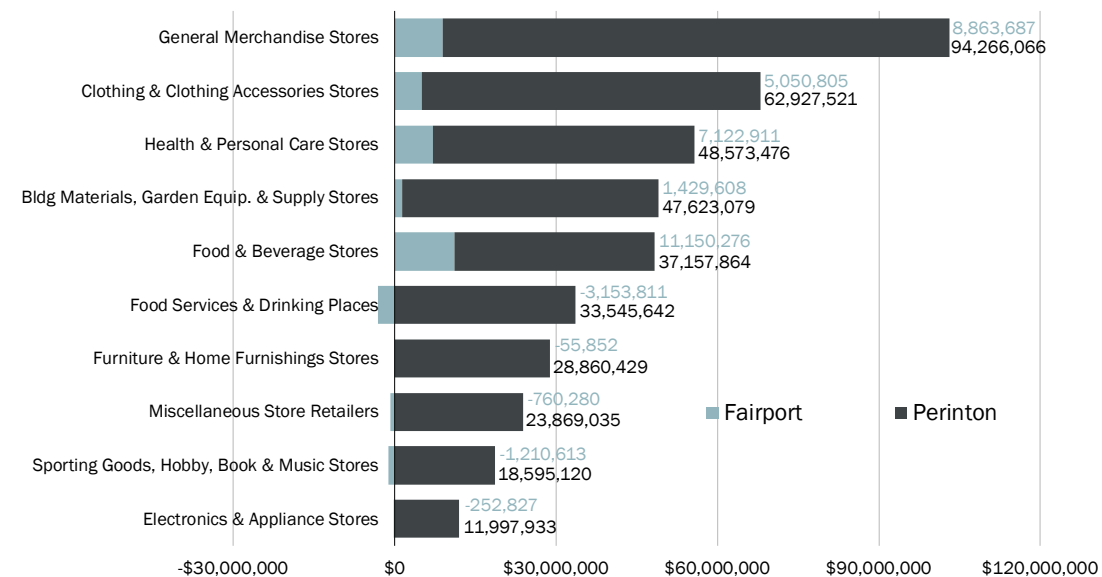
Source: US Census, County Business Patterns, US Energy Information Administration 2012 & Urban Advisors

Retail

Both Fairport and Perinton are losing retail sales in General Merchandise, Clothing and Apparel, and Building Materials to other places. With strong attractors like East View Mall and concentrations of shopping centers nearby, it may be difficult to recover these sales although the experience of a main street setting could help small businesses compete. Other categories “leaking” sales to other places include Food Stores and Health and Personal Care. These may be opportunities to provide more convenient options.

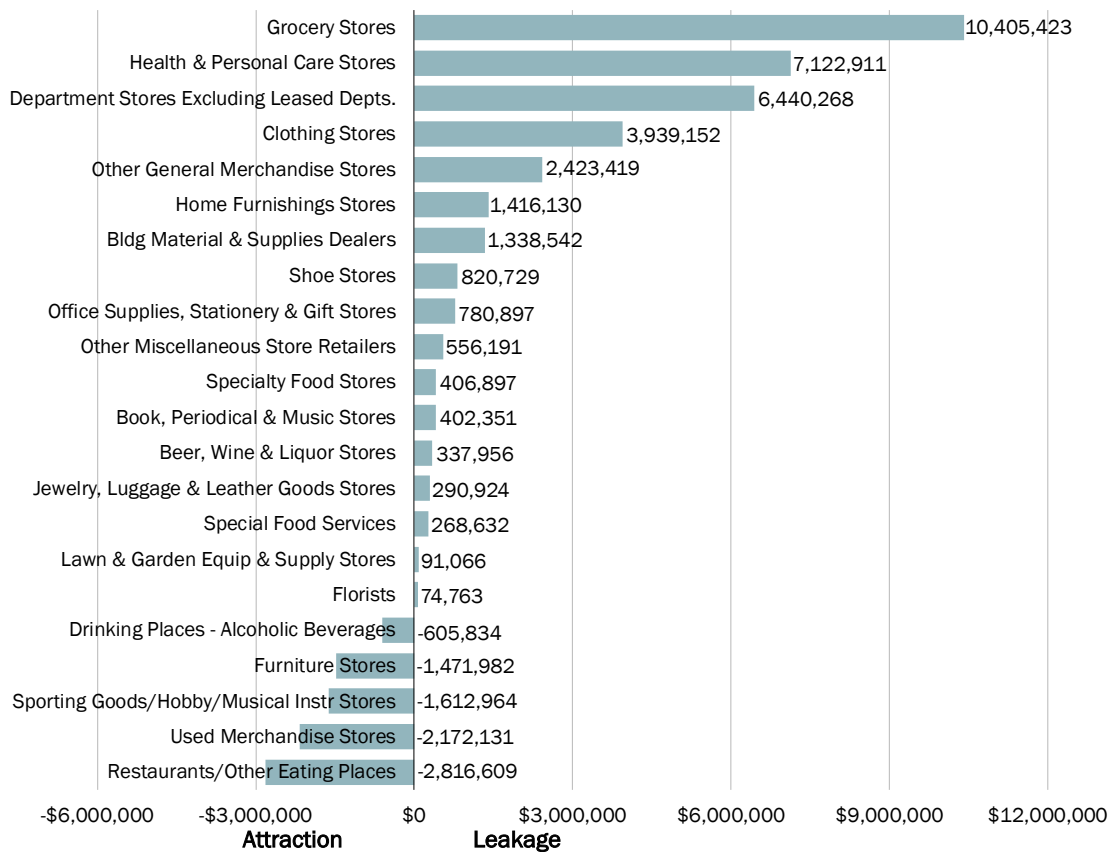
Fairport is an attractor of Food Service and Drinking establishments and may be able to extend its reach as the Perinton area still has excess spending capacity in this category that goes other places.

Figure 35 Retail Gap (Demand-Supply), Fairport and Perinton



Source: ESRI & Urban Advisors

Figure 36 Retail Gap (Retail Demand less Retail Supply), 2020, Village of Fairport



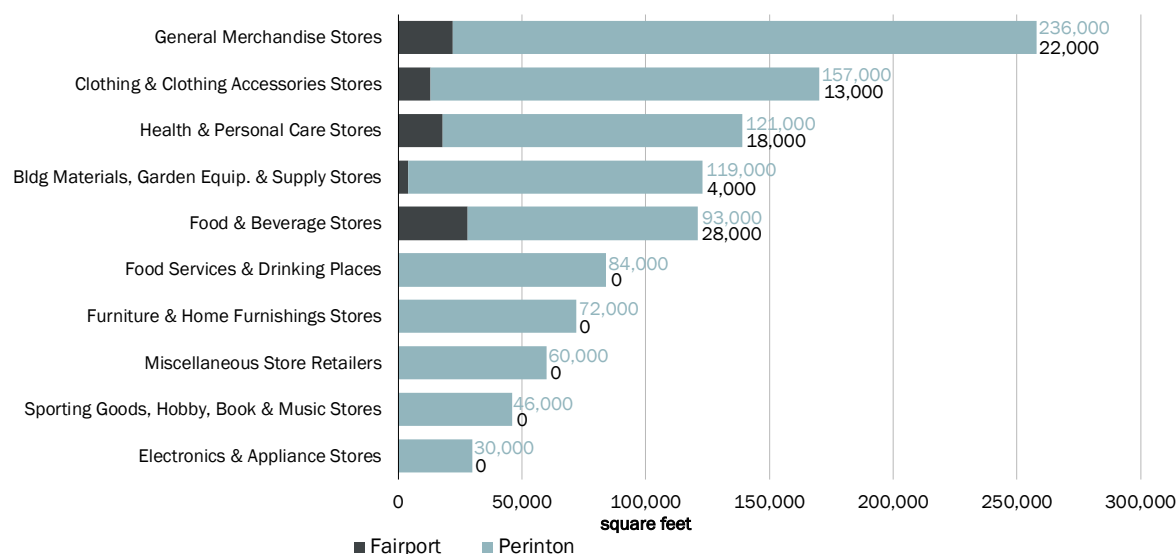
Source: ESRI & Infogroup, & Urban Advisors

Figure 37 Retail Demand Gap (Square Feet), 2020, Village of Fairport



Source: ESRI & Infogroup, & Urban Advisors

Figure 38 Retail Leakage (Support by Square Feet), 2020, Fairport and Perinton



Source: ESRI & Urban Advisors

Tapestry Segments

Households in the US have a unique mix of preferences, tastes, styles, and traits. They buy a mix of goods from a variety of stores, work in a mix of different occupations, and spend their free time in different ways. These varying household characteristics can make it difficult to properly identify the types of economic development projects or commercial development that best suits a community. Retailers, developers, site selectors, and businesses often use “market segmentation” to better understand preferences within the market. Market segmentation is based on the concept that households with similar demographic characteristics, brand preferences, and economic positions will tend to live in neighborhoods with others who share these traits.

ESRI developed the Tapestry Segmentation System to classify US neighborhoods based on socio-economic and demographic characteristics. Businesses use market segmentation to understand their customers’ lifestyle choices, purchasing preferences, and how they spend their free time, to better position themselves within local markets.

Figure 39 shows the most prevalent Tapestry Segments in Fairport relative to the US as a whole. Fairport contains a higher proportion of Comfortable Empty Nesters (30%), Old and Newcomers (16%) and In Style (16%) than the national average. These segments include older households with higher than average incomes, renters, affluent professionals. Appendix A includes more detailed descriptions of these Tapestry Segments.

Figure 39 Tapestry Segments

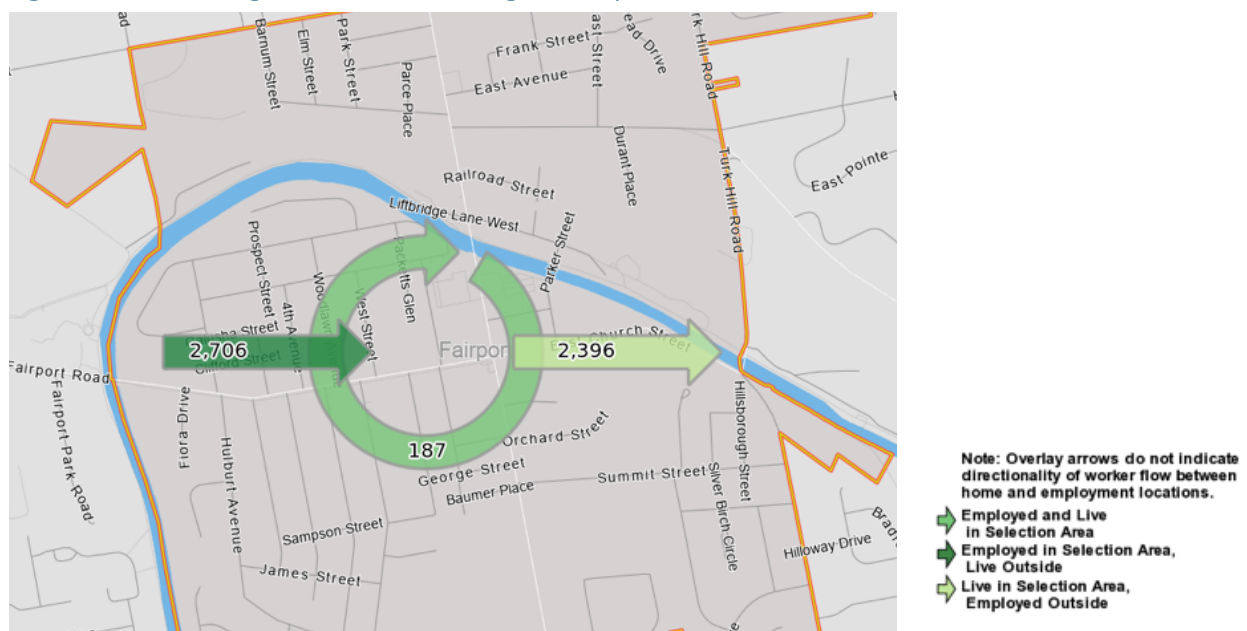
Tapestry Segment	Households	
	Fairport	US
Comfortable Empty Nester	30%	2%
Old and Newcomers	16%	2%
In Style	16%	2%
Emerald City	12%	1%
Rustbelt Traditions	12%	2%

Source: ESRI

Commuting Patterns

Commuting patterns play an important role in the dynamics of transportation, growth and economic development in a community. Figure 40 illustrates commuting patterns (from 2017) in and out of Fairport, showing that about 2,706 people lived outside the village and traveled into the village for work, about 2,396 village residents worked elsewhere, and just 187 workers lived and worked in the village. While there are numerous benefits to having non-resident jobs in the community, this commuting pattern does suggest that creating job opportunities in the community may not necessarily translate into jobs for residents unless there is an effort to attract those employees to the village to live. There is no rule of thumb for percentage of residents who live and work in a particular place. But we note that there may be opportunities to increase the proportion of workers who live and work in the village by attracting some of the 2,706 workers who commute to the village from elsewhere.

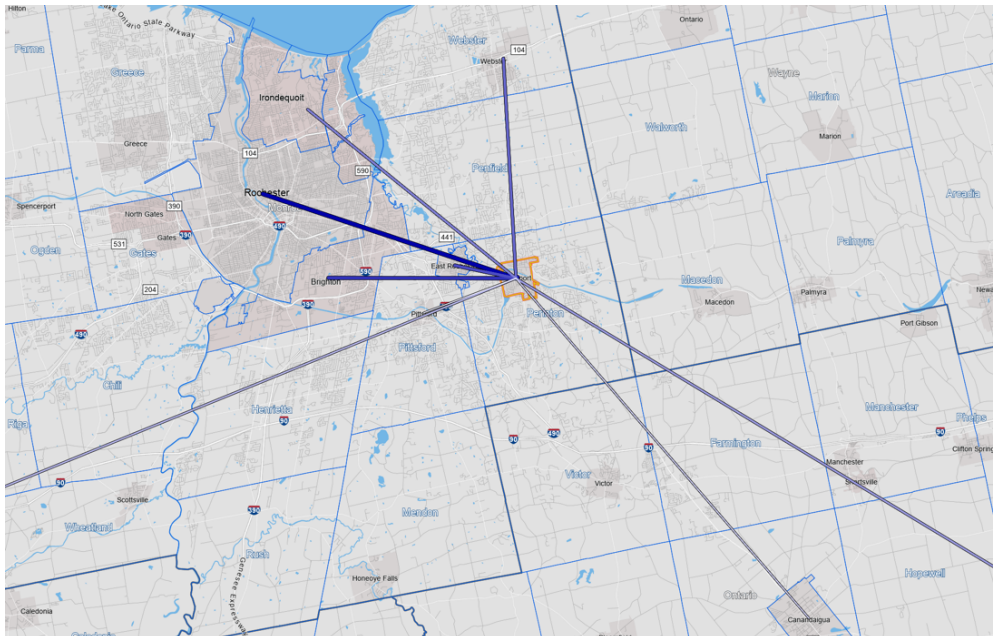
Figure 40 Commuting Patterns, 2017, Village of Fairport



Source: U.S. Census Bureau, OnTheMap and LEHD Origin-Destination Employment Statistics, & Urban Advisors

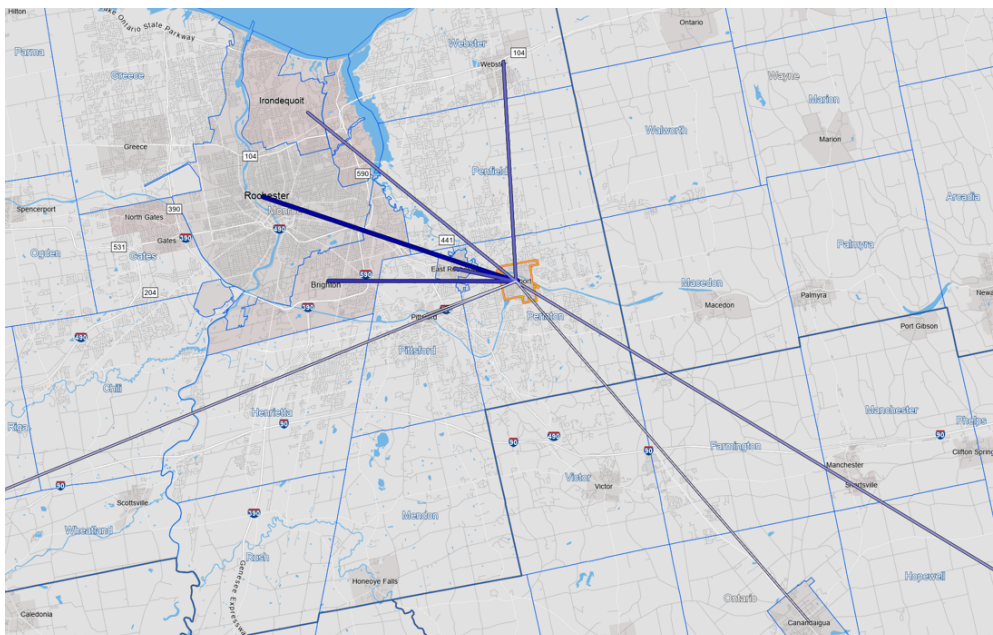
Figure 41 and Figure 42 show how far Fairport workers travel and where they commute from, illustrating that inbound and outbound workers are coming from and going to similar destinations, including the downtown Rochester, Brighton, Webster, and Irondequoit.

Figure 41 In-Bound Commuters, 2017, Village of Fairport



Source: U.S. Census Bureau, OnTheMap and LEHD Origin-Destination Employment Statistics, & Urban Advisors

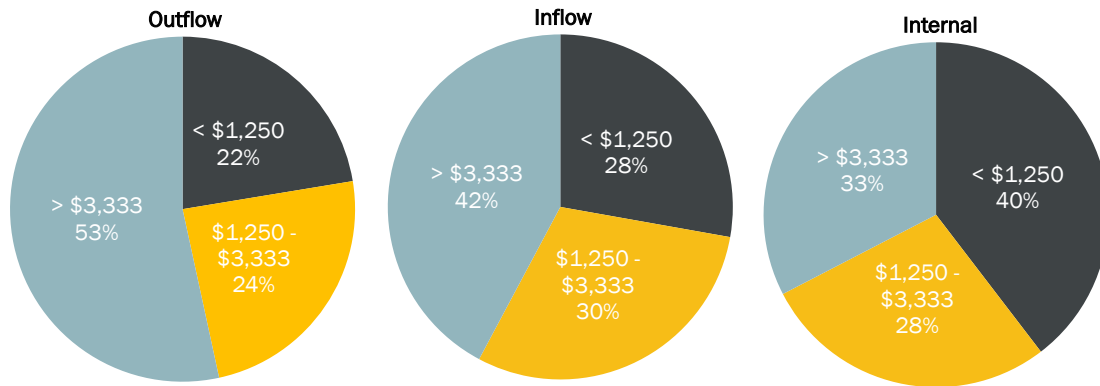
Figure 42 Out-Bound Commuters, 2017, Village of Fairport



Source: U.S. Census Bureau, OnTheMap and LEHD Origin-Destination Employment Statistics, & Urban Advisors

While the inbound and outbound commuting worker profiles appear to have relatively similar income levels (Figure 43), outbound commuters have generally higher incomes than inbound commuters. In addition, 40% of workers who live and work in Fairport are in the lowest income category, relative commuters (i.e. below a \$1,250 monthly income).

Figure 43 Jobs by Monthly Income Level, 2017, Village of Fairport



Source: U.S. Census Bureau, OnTheMap and LEHD Origin-Destination Employment Statistics, & Urban Advisors

APPENDIX A: TAPESTRY SEGMENTS

APPENDIX B: INTERVIEW SUMMARY

APPENDIX C: VISION AND SWOT SUMMARY

APPENDIX D: IMPACT ANALYSIS

APPENDIX E: INFRASTRUCTURE ANALYSIS

APPENDIX F: MAIN STREET SPECIAL AREA



LifeMode Group: GenXurban

Comfortable Empty Nesters

5A

Households: 3,024,200

Average Household Size: 2.52

Median Age: 48.0

Median Household Income: \$75,000

WHO ARE WE?

Residents in this large, growing segment are older, with nearly half of all householders aged 55 or older; many still live in the suburbs where they grew up. Most are professionals working in government, health care, or manufacturing. These Baby Boomers are earning a comfortable living and benefitting from years of prudent investing and saving. Their net worth is well above average (Index 314). Many are enjoying the transition from child rearing to retirement. They value their health and financial well-being.

OUR NEIGHBORHOOD

- Married couples, some with children, but most without (Index 149).
- Average household size slightly higher at 2.52.
- Found throughout the suburbs and small towns of metropolitan areas, where most residents own and live in single-family detached homes (Index 142).
- Most homes built between 1950 and 1990 (Index 131).
- Households generally have one or two vehicles.

SOCIOECONOMIC TRAITS

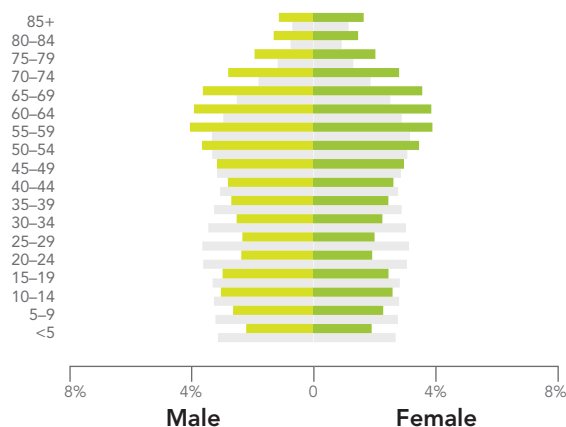
- Education: 36% college graduates; nearly 68% with some college education.
- Low unemployment at 4%; average labor force participation at 61%.
- Most households income from wages or salaries, but a third also draw income from investments (Index 150) and retirement (Index 159).
- *Comfortable Empty Nesters* residents physically and financially active.
- Prefer eating at home instead of dining out.
- Home maintenance a priority among these homeowners.



AGE BY SEX (Esri data)

Median Age: **48.0** US: 38.2

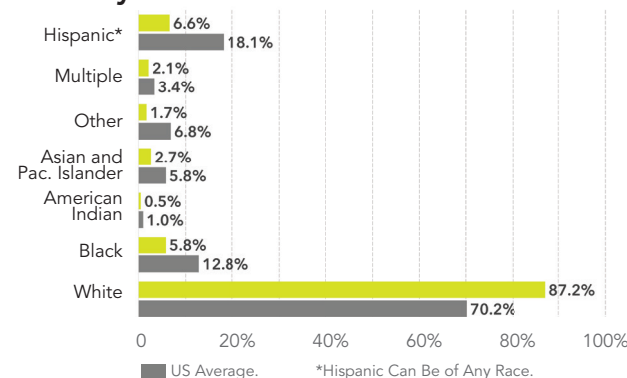
■ Indicates US



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: **33.0** US: 64.0



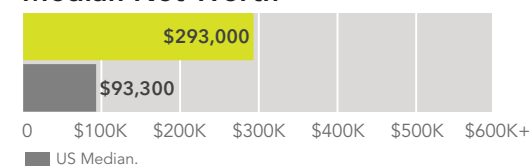
INCOME AND NET WORTH

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

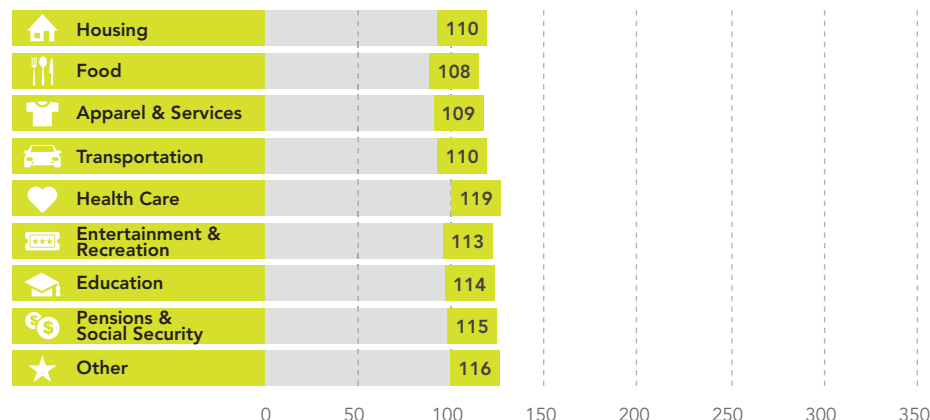


Median Net Worth



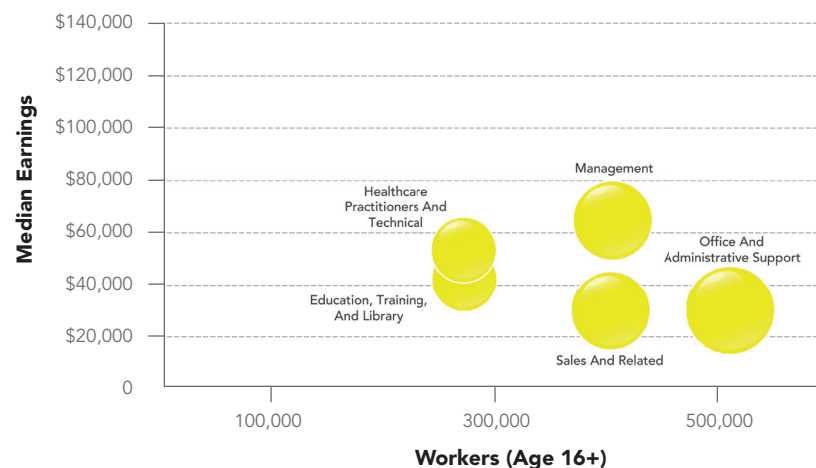
AVERAGE HOUSEHOLD BUDGET INDEX

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)

- Residents enjoy listening to sports radio or watching sports on television.
- Physically active, they play golf, ski, ride bicycles, and work out regularly.
- Spending a lot of time online isn't a priority, so most own older home computers.
- Financial portfolio includes stocks, certificates of deposit, mutual funds, and real estate.

HOUSING

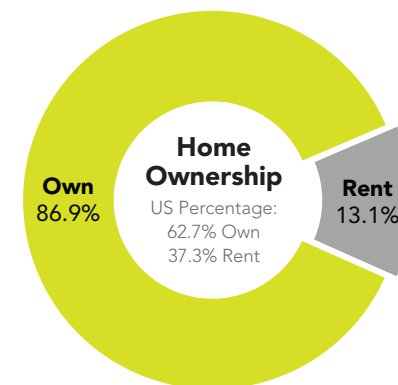
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

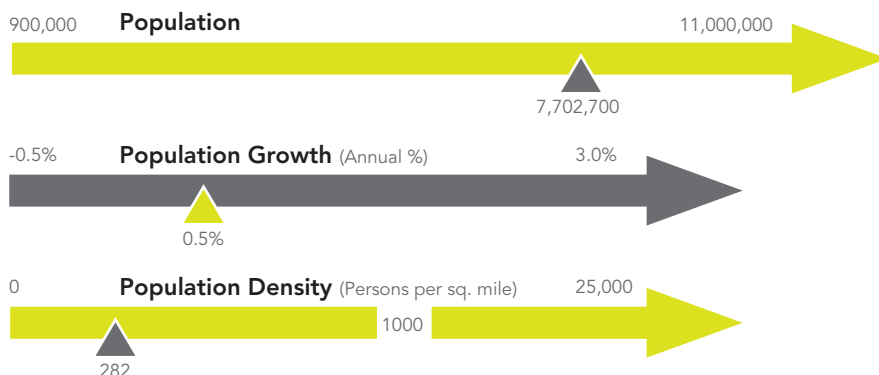
Median Value:
\$203,400

US Median: \$207,300



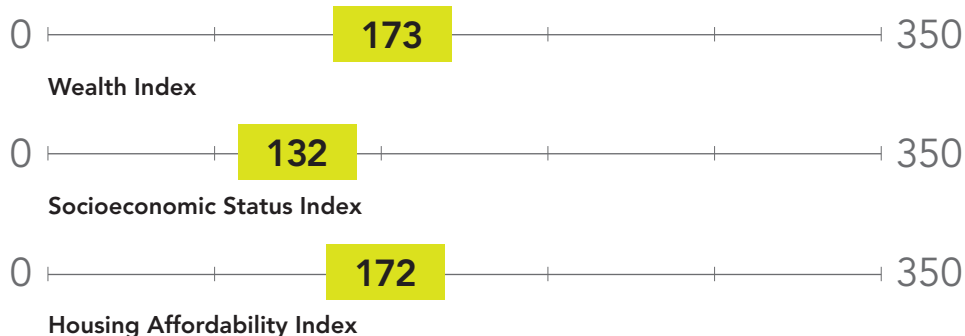
POPULATION CHARACTERISTICS

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: GenXurban

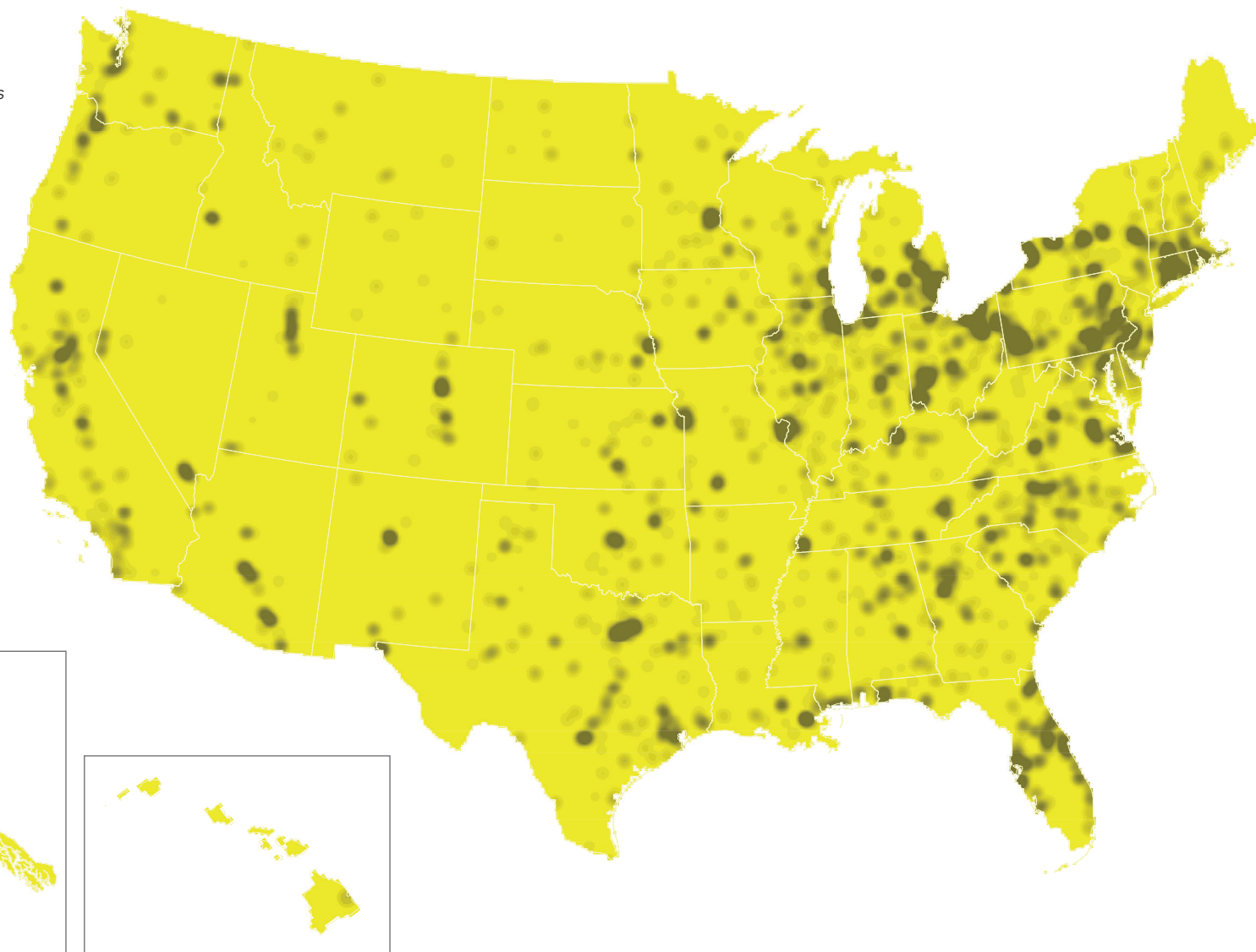
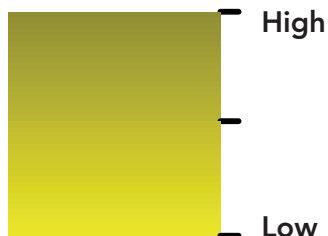
Comfortable Empty Nesters



TAPESTRY
SEGMENTATION
esri.com/tapestry

SEGMENT DENSITY

This map illustrates the density and distribution of the *Comfortable Empty Nesters* Tapestry Segment by households.



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LifeMode Group: Middle Ground

Old and Newcomers

8F

Households: 2,859,200

Average Household Size: 2.12

Median Age: 39.4

Median Household Income: \$44,900

WHO ARE WE?

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

OUR NEIGHBORHOOD

- Metropolitan city dwellers.
- Predominantly single households (Index 148), with a mix of married couples (no children); average household size lower at 2.12.
- 55% renter occupied; average rent, \$880, (Index 85).
- 45% of housing units are single-family dwellings; 45% are multiunit buildings in older neighborhoods, built before 1980.
- Average vacancy rate at 11%.

SOCIOECONOMIC TRAITS

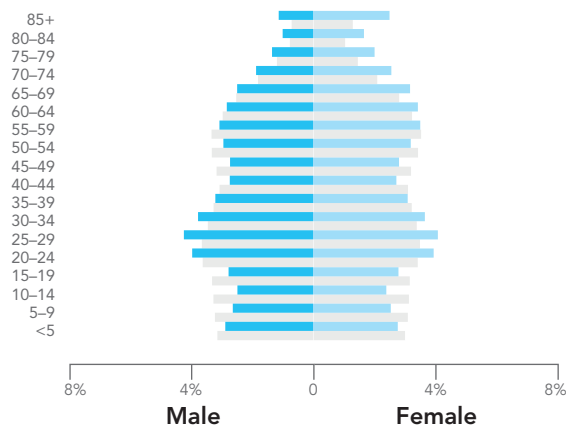
- Unemployment is lower at 5.1% (Index 93), with an average labor force participation rate of 62.6%, despite the increasing number of retired workers.
- 32% of households are currently receiving Social Security.
- 31% have a college degree (Index 99), 33% have some college education, 9% are still enrolled in college (Index 121).
- Consumers are price aware and coupon clippers, but open to impulse buys.
- They are attentive to environmental concerns.
- They are more comfortable with the latest technology than buying a car.



AGE BY SEX (Esri data)

Median Age: **39.4** US: 38.2

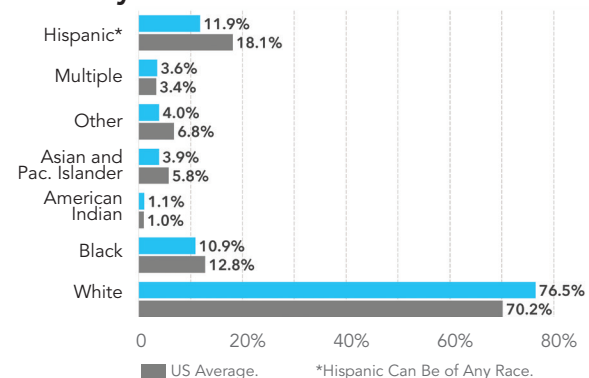
■ Indicates US



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: **52.7** US: 64.0



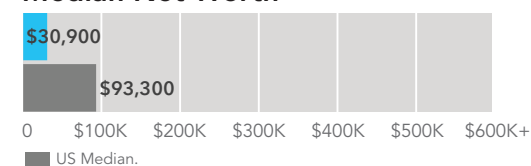
INCOME AND NET WORTH

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

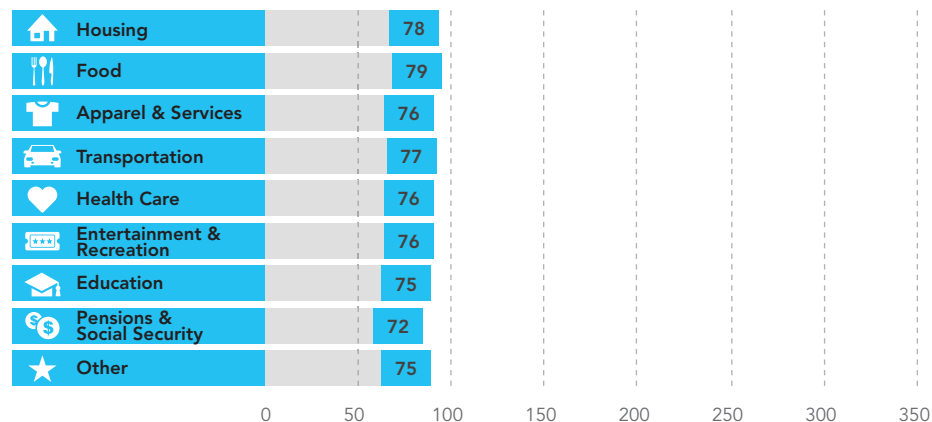


Median Net Worth



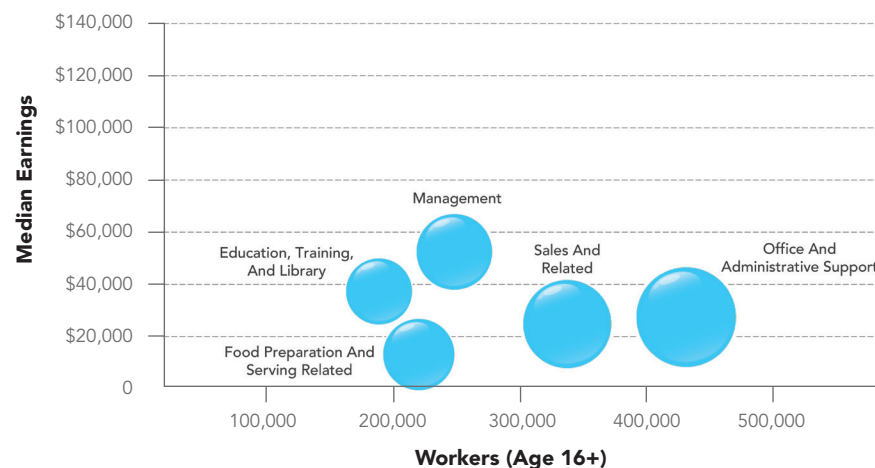
AVERAGE HOUSEHOLD BUDGET INDEX

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)

- Residents have a strong sense of community. They volunteer for charities, help fund raise, and recycle.
- They prefer cell phones to landlines.
- Entertainment features the Internet (employment searches, rating products, updating social media profiles), watching movies at home, listening to country music, and reading the paper.
- Vehicles are basically just a means of transportation.
- Food features convenience, frozen and fast food.
- They do banking as likely in person as online.

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.



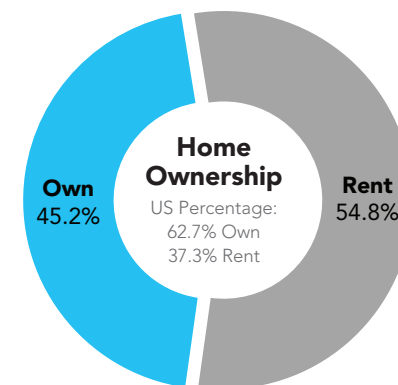
Typical Housing:

Single Family;
Multi-Units

Average Rent:

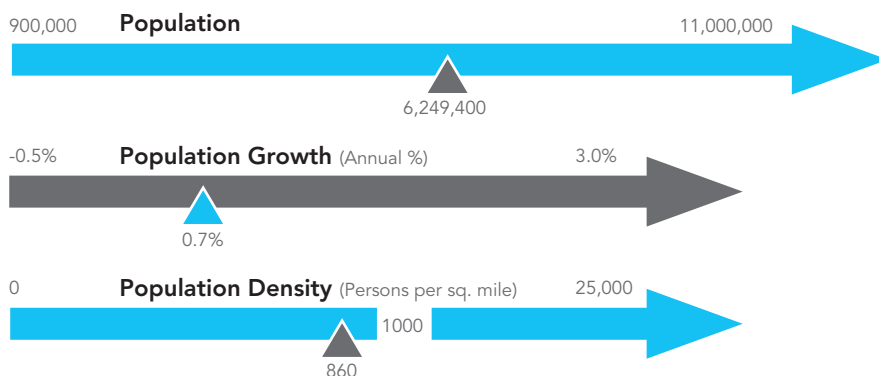
\$880

US Average: \$1,038



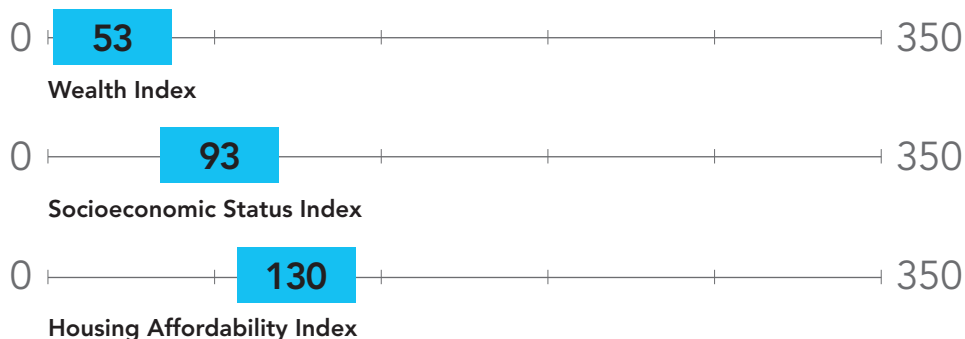
POPULATION CHARACTERISTICS

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

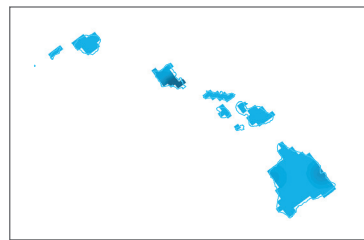
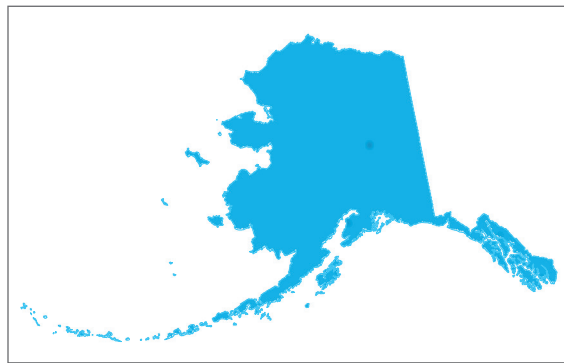
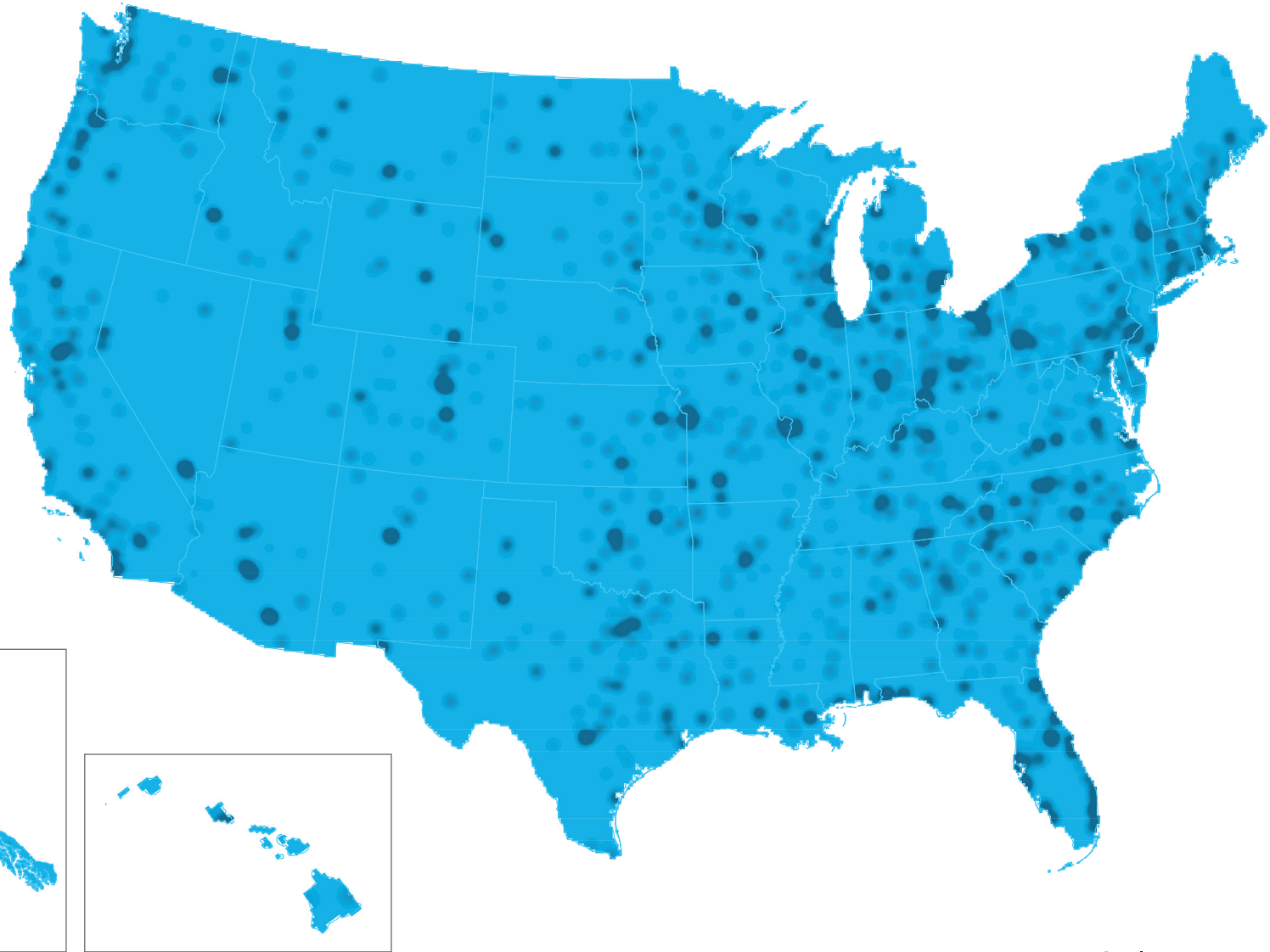
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *Old and Newcomers* Tapestry Segment by households.



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LifeMode Group: GenXurban

In Style

5B

Households: 2,764,500

Average Household Size: 2.35

Median Age: 42.0

Median Household Income: \$73,000

WHO ARE WE?

In Style denizens embrace an urbane lifestyle that includes support of the arts, travel, and extensive reading. They are connected and make full use of the advantages of mobile devices. Professional couples or single households without children, they have the time to focus on their homes and their interests. The population is slightly older and already planning for their retirement.

OUR NEIGHBORHOOD

- City dwellers of large metropolitan areas.
- Married couples, primarily with no children (Index 112) or single households (Index 109); average household size at 2.35.
- Home ownership average at 68% (Index 108); nearly half, 47%, mortgaged (Index 114).
- Primarily single-family homes, in older neighborhoods (built before 1980), with a mix of town homes (Index 132) and smaller (5–19 units) apartment buildings (Index 110).
- Median home value at \$243,900.
- Vacant housing units at 8.6%.

SOCIOECONOMIC TRAITS

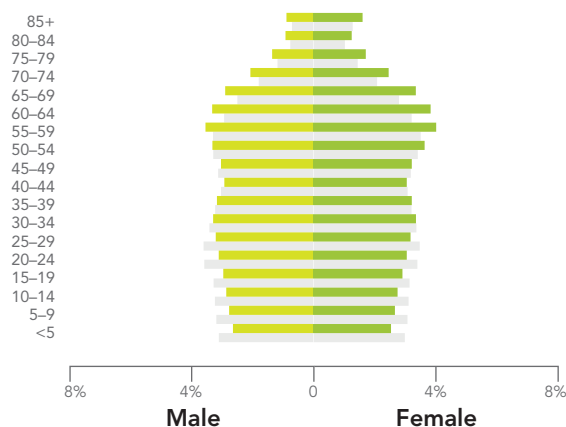
- College educated: 48% are graduates (Index 155); 77% with some college education.
- Low unemployment is at 3.6% (Index 66); higher labor force participation rate is at 67% (Index 108) with proportionately more 2-worker households (Index 110).
- Median household income of \$73,000 reveals an affluent market with income supplemented by investments (Index 142) and a substantial net worth (Index 178).
- Connected and knowledgeable, they carry smartphones and use many of the features.
- Attentive to price, they use coupons, especially mobile coupons.



AGE BY SEX (Esri data)

Median Age: **42.0** US: 38.2

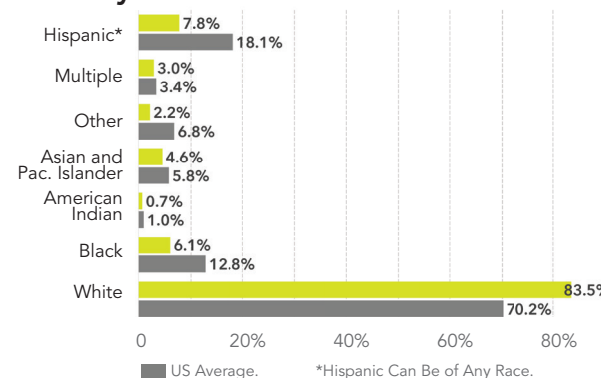
■ Indicates US



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: **39.8** US: 64.0



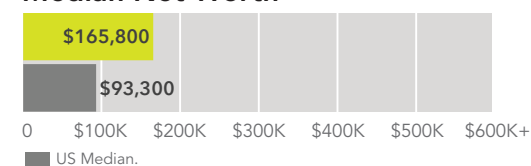
INCOME AND NET WORTH

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

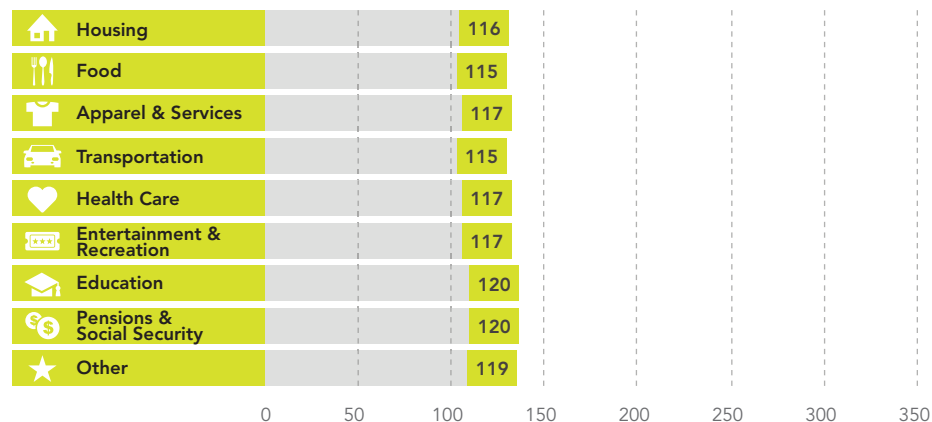


Median Net Worth



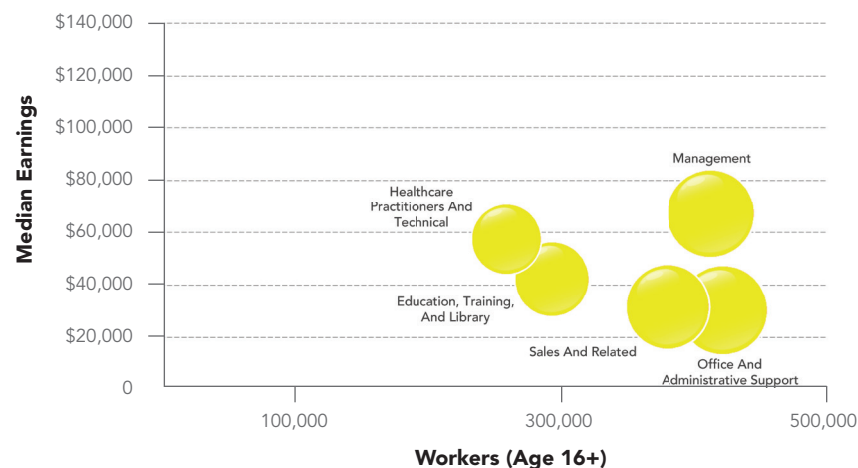
AVERAGE HOUSEHOLD BUDGET INDEX

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)

- Partial to late model SUVs: compact SUVs are gaining popularity.
- Homes integral part of their style; invest in home remodeling/maintenance, DIY or contractors; housekeeping hired.
- Prefer organic foods, including growing their own vegetables.
- Financially active, own a variety of investments often managed by a financial planner.
- Meticulous planners, both well insured and well invested in retirement savings.
- Generous with support of various charities and causes.
- Actively support the arts, theater, concerts, and museums.

HOUSING

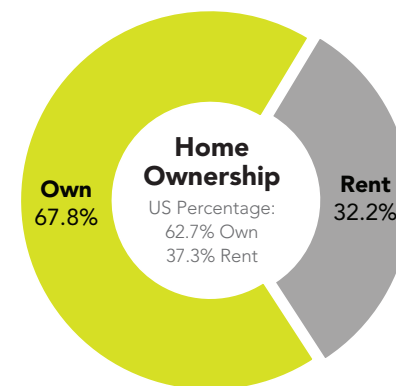
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

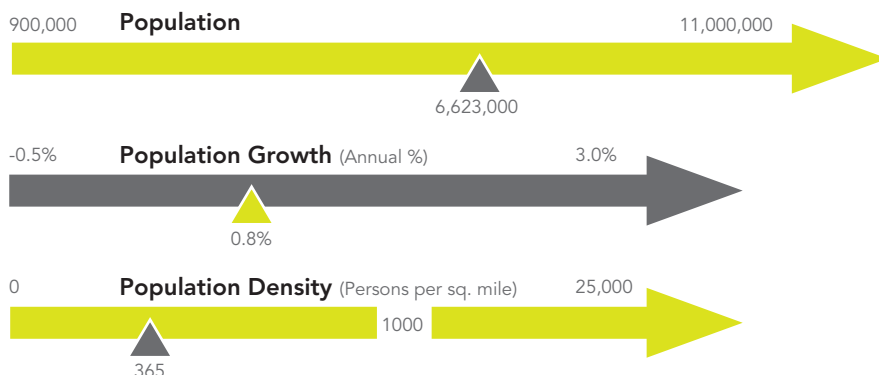
Median Value:
\$243,900

US Median: \$207,300



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

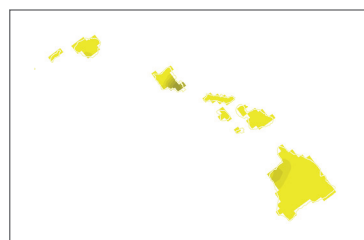
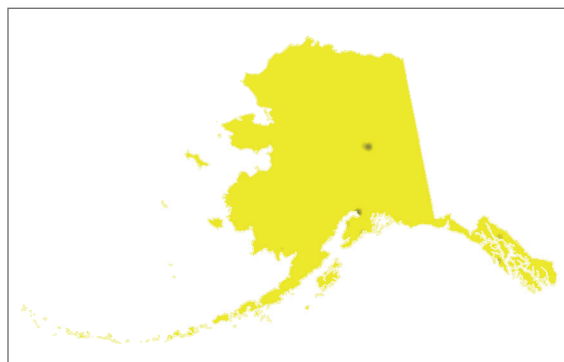
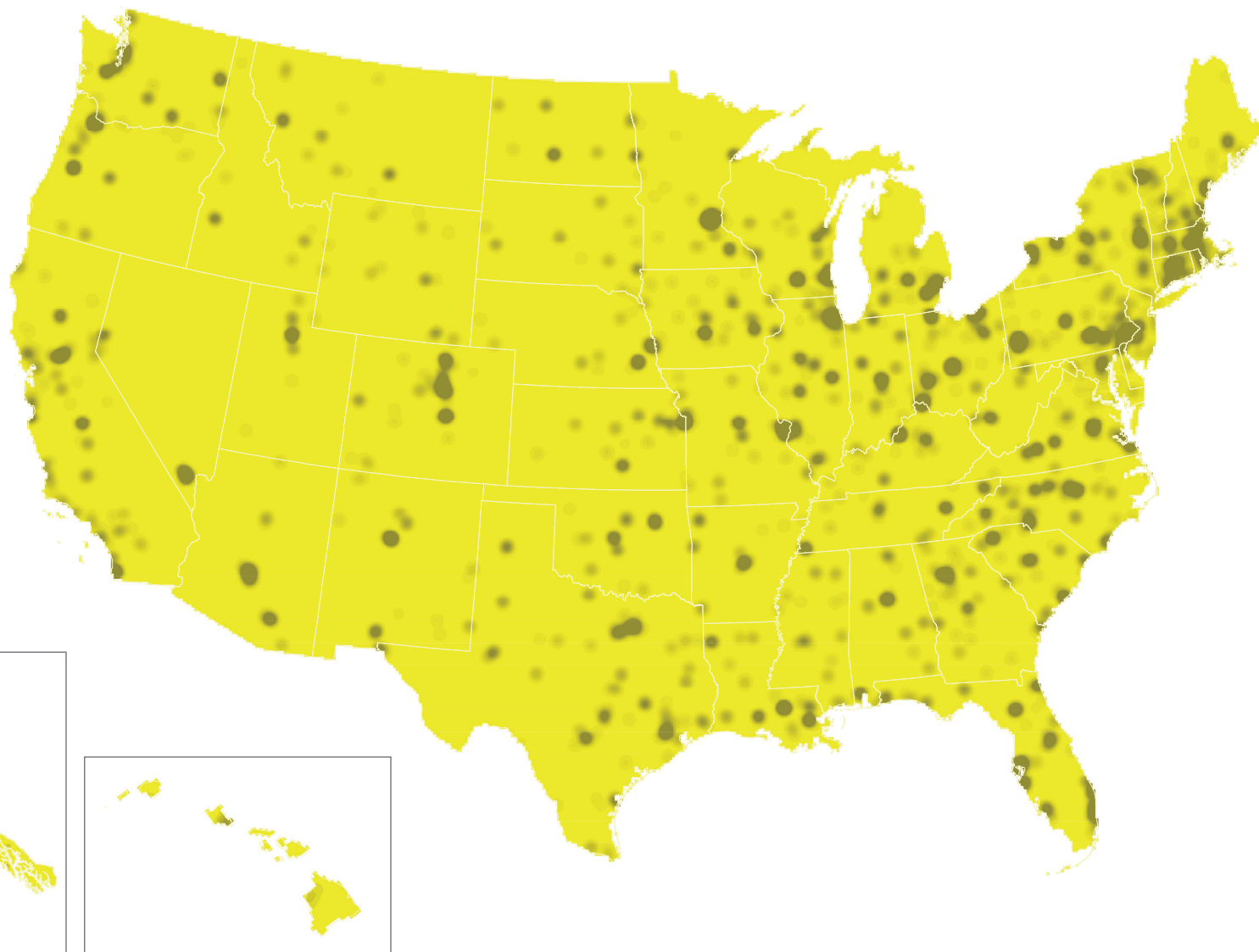
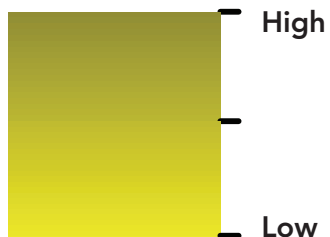
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *In Style* Tapestry Segment by households.





LifeMode Group: Middle Ground

Emerald City

8B

Households: 1,748,600

Average Household Size: 2.06

Median Age: 37.4

Median Household Income: \$59,200

WHO ARE WE?

Emerald City's denizens live in lower-density neighborhoods of urban areas throughout the country. Young and mobile, they are more likely to rent. Well educated and well employed, half have a college degree and a professional occupation. Incomes close to the US median come primarily from wages, investments, and self-employment. This group is highly connected, using the Internet for entertainment and making environmentally friendly purchases. Long hours on the Internet are balanced with time at the gym. Many embrace the "foodie" culture and enjoy cooking adventurous meals using local and organic foods. Music and art are major sources of enjoyment. They travel frequently, both abroad and domestically.

OUR NEIGHBORHOOD

- There are mostly older, established neighborhoods with homes built before 1960; around 30% built before 1940.
- Just over half of all homes are renter occupied.
- Single-person and nonfamily types make up over half of all households.
- Median home value and average rent are slightly above the US levels; around half of owned homes are worth \$150,000–\$300,000.

SOCIOECONOMIC TRAITS

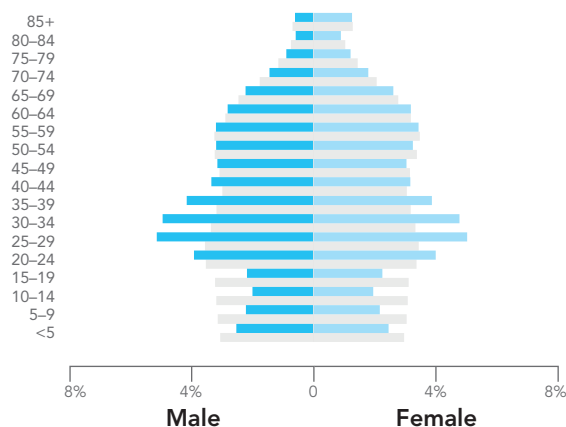
- Well educated, these consumers research products carefully before making purchases.
- They buy natural, green, and environmentally friendly products.
- Very conscious of nutrition, they regularly buy and eat organic foods.
- Cell phones and text messaging are a huge part of everyday life.
- They place importance on learning new things to keep life fresh and variable.
- They are interested in the fine arts and especially enjoy listening to music.



AGE BY SEX (Esri data)

Median Age: **37.4** US: 38.2

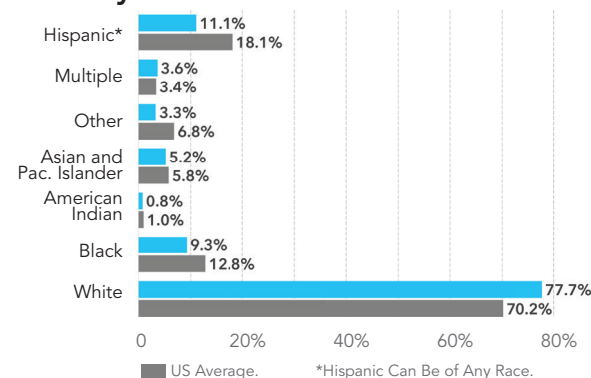
■ Indicates US



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: **50.6** US: 64.0



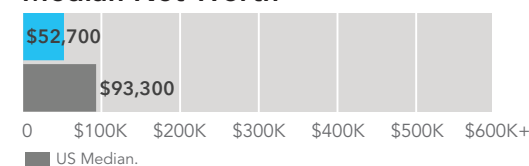
INCOME AND NET WORTH

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Median Household Income

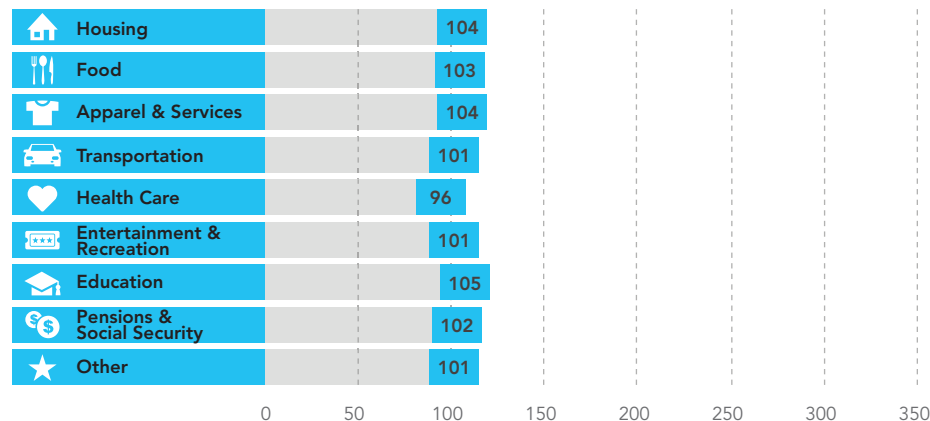


Median Net Worth



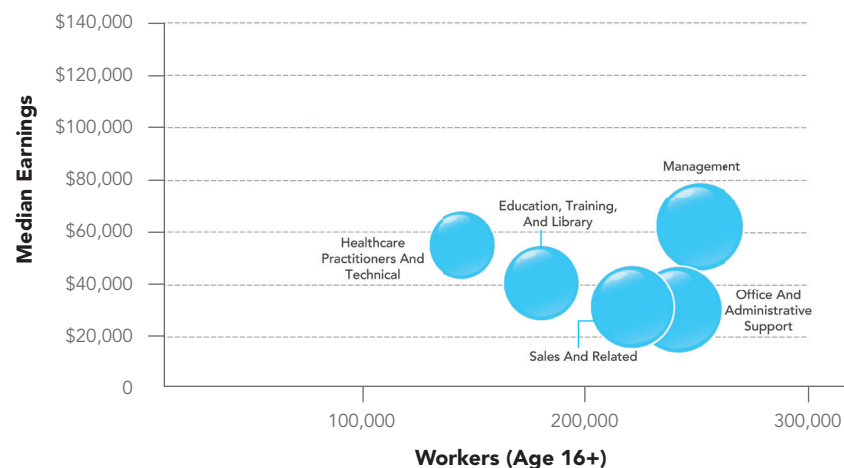
AVERAGE HOUSEHOLD BUDGET INDEX

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)

- Liberal segment that contributes to NPR and PBS.
- Shop at Trader Joe's and Whole Foods.
- Budget time—utilize home cleaning services so there's time for yoga.
- Use the web for professional networking, blogging, making travel plans, shopping, and sports news.
- Read magazines and books on a tablet, sometimes while exercising at home.
- Attend venues like art galleries, museums, and concerts. At home they like to cook and bake.

HOUSING

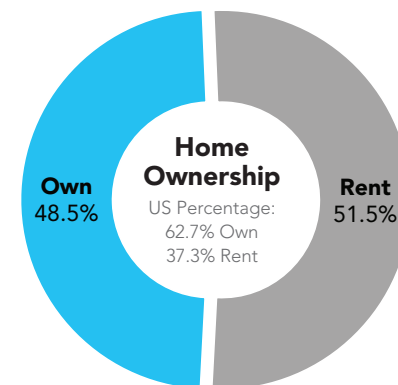
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family;
Multi-Units

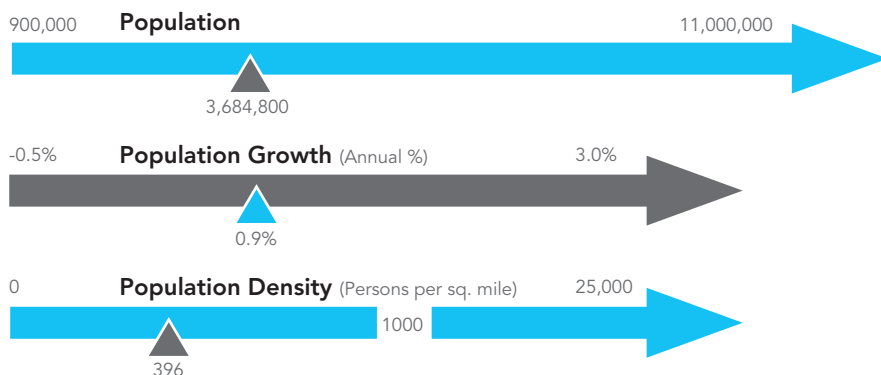
Average Rent:
\$1,087

US Average: \$1,038



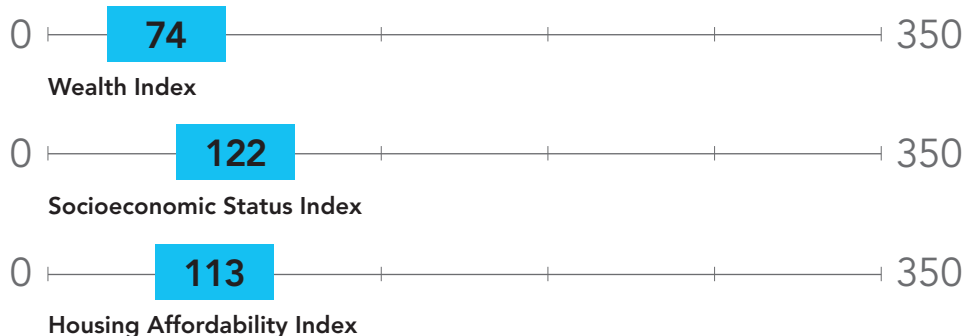
POPULATION CHARACTERISTICS

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ESRI INDEXES

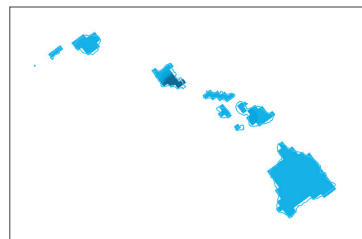
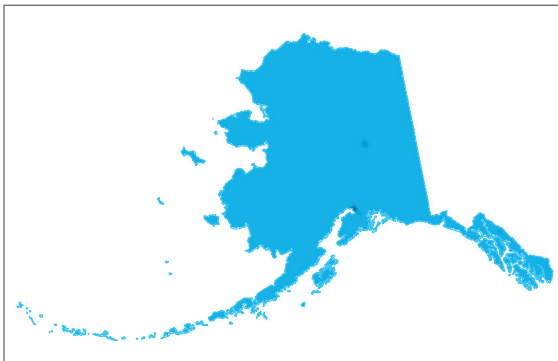
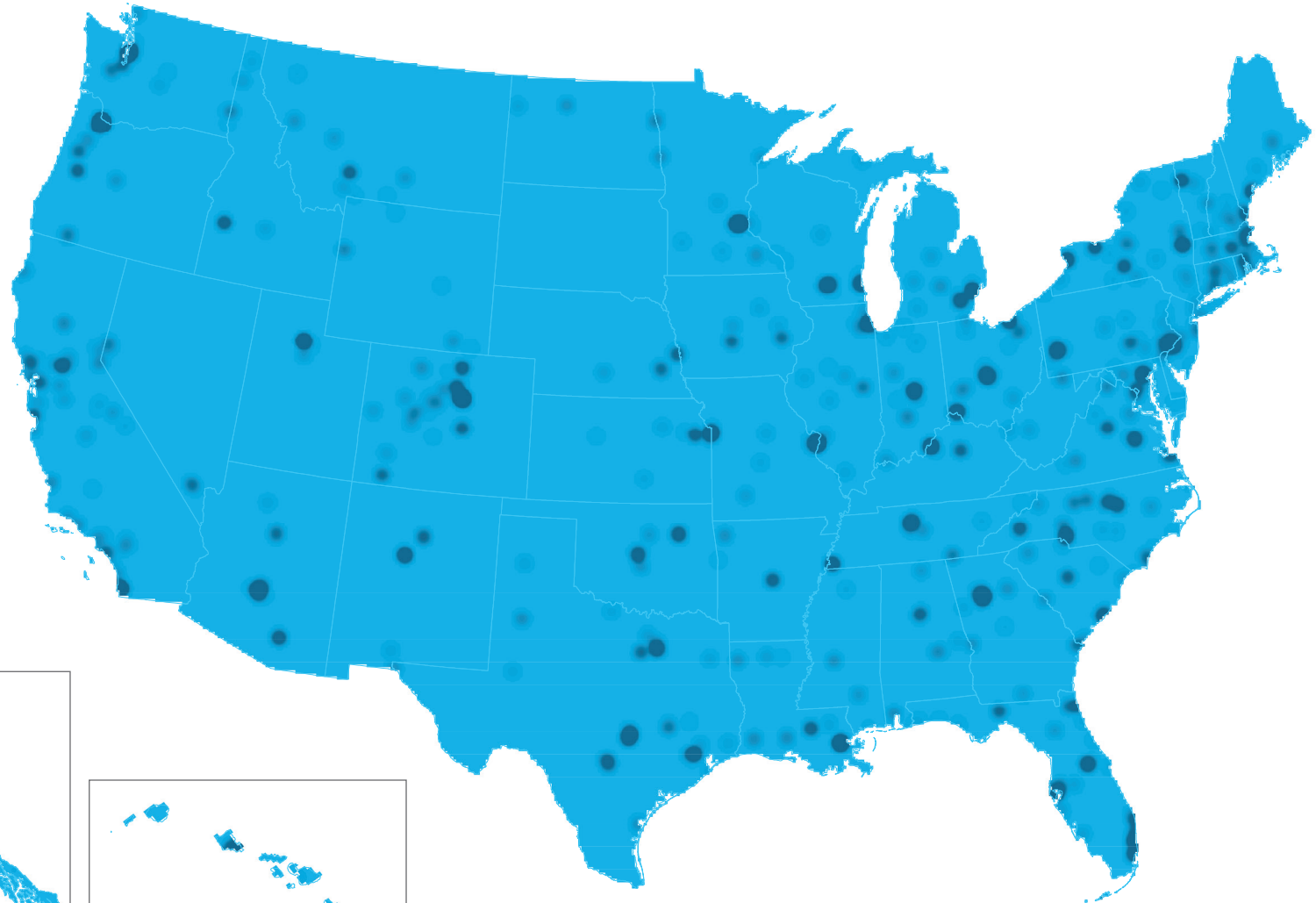
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *Emerald City* Tapestry Segment by households.





LifeMode Group: GenXurban

Rustbelt Traditions

5D

Households: 2,716,800

Average Household Size: 2.47

Median Age: 39.0

Median Household Income: \$51,800

WHO ARE WE?

The backbone of older industrial cities in states surrounding the Great Lakes, *Rustbelt Traditions* residents are a mix of married-couple families and singles living in older developments of single-family homes. While varied, the work force is primarily white collar, with a higher concentration of skilled workers in manufacturing, retail trade, and health care. *Rustbelt Traditions* represents a large market of stable, hard-working consumers with modest incomes but an average net worth of nearly \$400,000. Family oriented, they value time spent at home. Most have lived, worked, and played in the same area for years.

OUR NEIGHBORHOOD

- Almost half (46%) of the households are married-couple families, similar to the US (48%), most without children (also similar to the US); the slightly higher proportion of singles (Index 105) reflects the aging of the population.
- Average household size is slightly lower at 2.47.
- They are movers, slightly more mobile than the US population (Index 109), but over 70 percent of house holders moved into their current homes before 2010.
- Most residents live in modest, single-family homes in older neighborhoods built in the 1950s (Index 224).
- Nearly three quarters own their homes; nearly half of households have mortgages.
- A large and growing market, *Rustbelt Traditions* residents are located in the dense urban fringe of metropolitan areas throughout the Midwest and South.
- Most households have 1 to 2 vehicles available.

SOCIOECONOMIC TRAITS

- Most have graduated from high school or spent some time at a college or university.
- Unemployment below the US at 5.2%; labor force participation slightly higher than the US at 67%.
- While most income derived from wages and salaries, nearly 31% of households collecting Social Security and nearly 20% drawing income from retirement accounts.
- Family-oriented consumers who value time spent at home.
- Most lived, worked, and played in the same area for years.
- Budget aware shoppers that favor American-made products.
- Read newspapers, especially the Sunday editions.



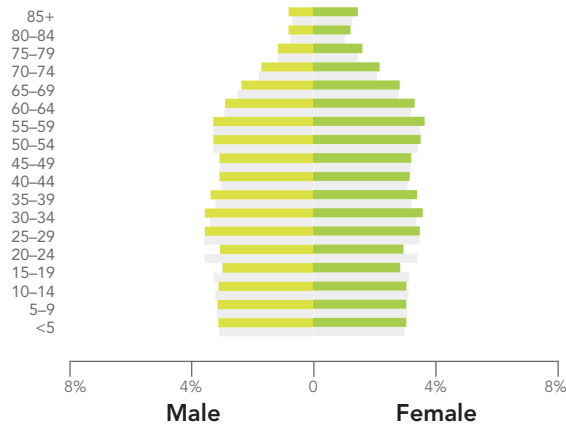
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



AGE BY SEX (Esri data)

Median Age: **39.0** US: 38.2

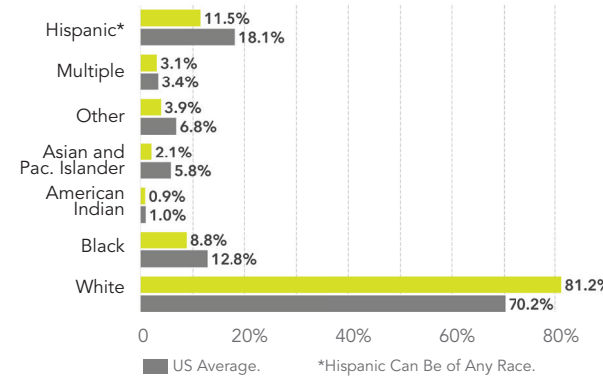
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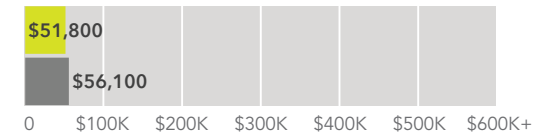
Diversity Index: **46.8** US: 64.0



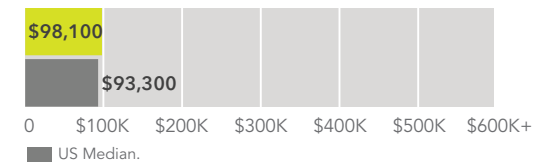
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Median Household Income

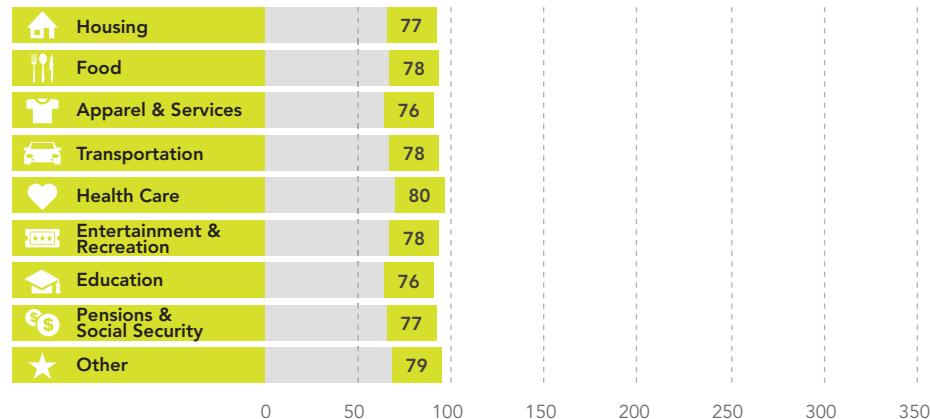


Median Net Worth



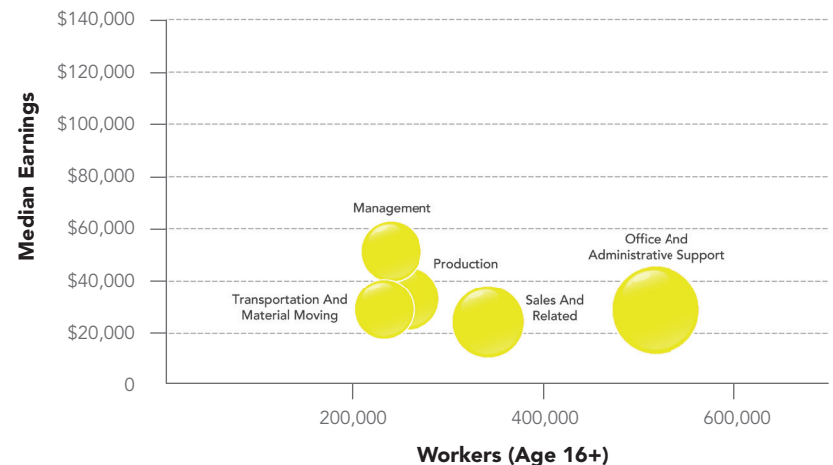
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LifeMode Group: GenXurban

Rustbelt Traditions



TAPESTRY
SEGMENTATION
esri.com/tapestry

MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Residents take advantage of convenience stores for fueling up and picking up incidentals.
- Watching television is a common pastime; many households have more than four TVs.
- Favorite programming ranges from ABC Family Channel, A&E, and TNT to children's shows on Nickelodeon and the Disney Channel.
- Residents are connected; entertainment activities like online gaming dominate their Internet usage.
- Favorite family restaurants include Applebee's, Arby's, and Texas Roadhouse.
- Radio dials are typically tuned to classic rock stations.

HOUSING

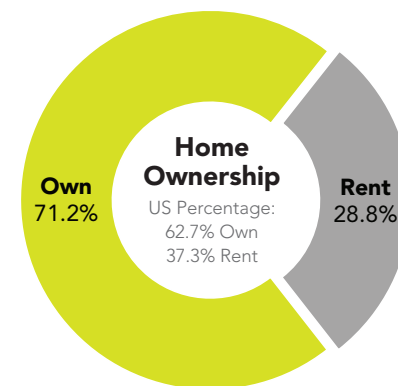
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Typical Housing:
Single Family

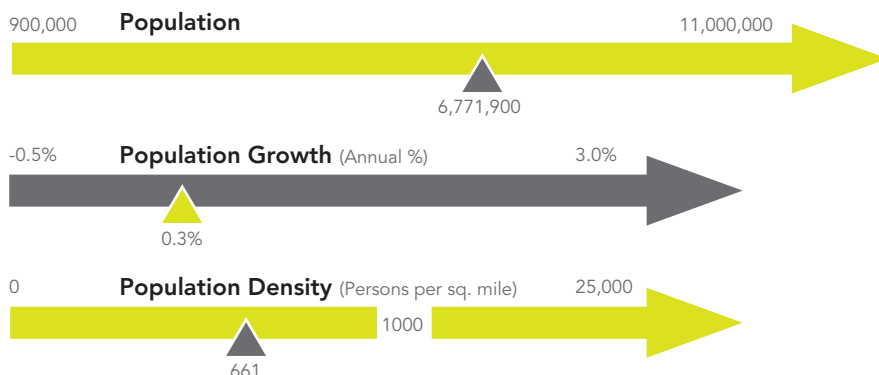
Median Value:
\$123,400

US Median: \$207,300



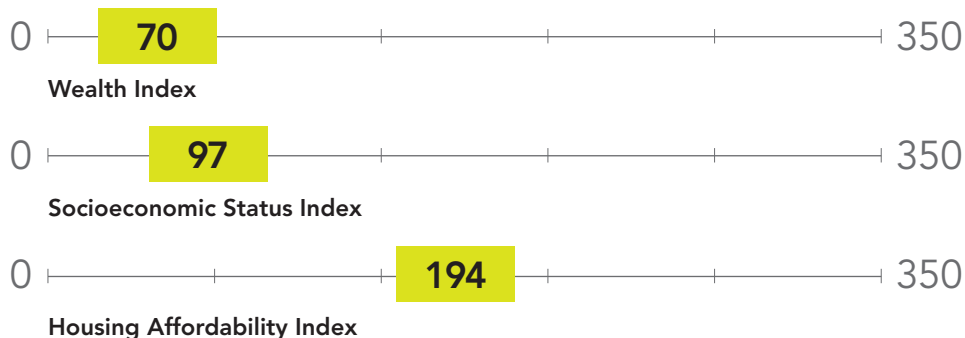
POPULATION CHARACTERISTICS

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ESRI INDEXES

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LifeMode Group: GenXurban

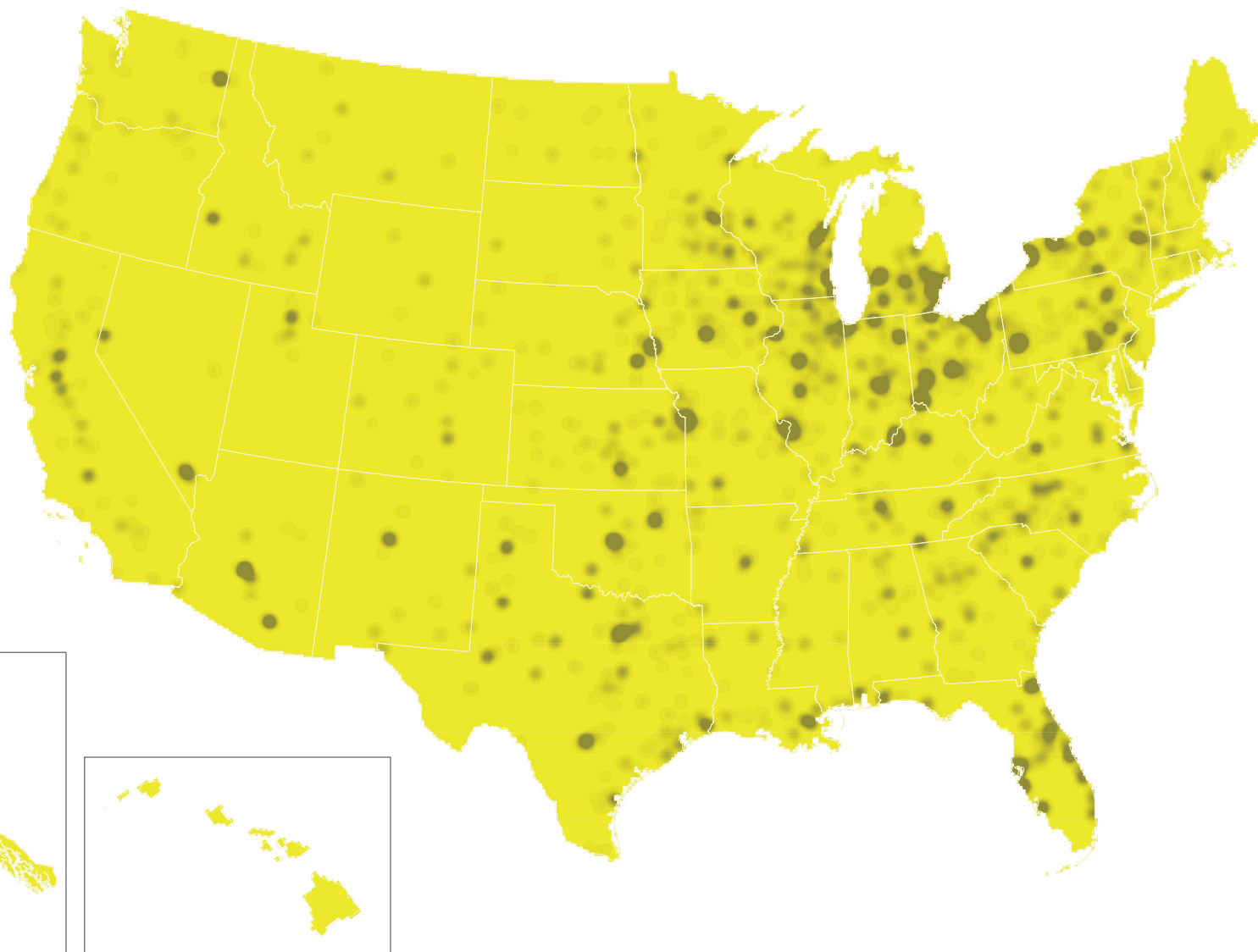
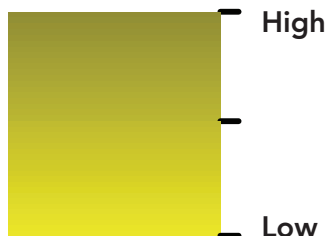
Rustbelt Traditions



TAPESTRY
SEGMENTATION
esri.com/tapestry

SEGMENT DENSITY

This map illustrates the density and distribution of the *Rustbelt Traditions* Tapestry Segment by households.



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MEMO

To: Fairport Office of Community and Economic Development
From: Highland Planning and Urban Advisors
RE: Fairport Economic Development Study
Date: August 2020

INTERVIEW

An invitation was extended to participants to partake in an interview to discuss the Fairport Economic Development Study. Key stakeholders were chosen for their knowledge, expertise, and feedback as it relates to the Village of Fairport.

In lieu of an in-person interview, one-on-one interviews were held virtually. The purpose of the interview was to gather initial feedback from participants about challenges, opportunities, and solutions for economic development in Fairport.

KEY THEMES

Key challenges to economic development:

- Not enough parking in the village/parking issues.
- Taxes need to remain stable. High taxes in Fairport. It gives our apartment community strength. When we have a private community, the town taxes us in a different way than if it's single family ownership. Multi-family communities pay less per unit in property taxes. We are able to pass along the tax savings. The property tax depresses home prices. If people are paying \$1,000 per month in taxes, there's only so much they can pay in a mortgage.
- Developers need to build up to maximize space and provide enough units to make project make financial sense.
- Fairport community is pretty much developed at this point.
- Comp plans haven't changed much over the years and are slow moving when it comes to development, i.e. the North Bank project.
- Perceived challenge to get investors to invest in the North side of the tracks.
- People prefer to own vs. rent.
- Desire for more shops in the Village to make it a shopping destination.

- Village should spend more on beautification like Canandaigua, Skaneateles or Niagara on the Lake.
- Some people don't like coming to the village because of delays on traffic due to lift bridge and train tracks.
- Some buildings on the North side are outdated and unattractive and need to be updated.
- Price points are all over depending on the building.
- Challenges: Village is at a decision point. It has always been focused on being a residential village. Families live here. People can retire here. It has been resident-centric. Over the last few years, a lot of services and uses have kept people here. Those kinds of services and entertainment and amenities have attracted people here from around the region. Do you really want to go all in becoming a "destination" like a Saratoga or Skaneateles? People doing a day trip to Fairport who need a hotel. Or do we want to grow, but keep within this footprint and still be a community for families. It's about maintaining that balance. Biggest challenge is that because of growth and development, they have to be careful not to price families out of the area. There are people looking for investment opportunities. Northwest Perinton is still an area where families can still move in. What happens when those start hitting price points that are out of range. That would change the look and feel of the village. Is that where the village wants to go?
- You could still maintain housing for all income levels while still being a destination.
- Need to be careful of overdevelopment. Village fields a lot of inquiries. There is limited opportunity. They need to be careful of assets we have because we have a finite set of assets/land and what is the best use of those vs. taking anyone who walks through the door.
- The process for approvals is very cumbersome that adds a lot of cost. Sometimes, the community will make you do something to satisfy a small number of people who show up to a meeting. I believe you have to empower neighbors, but it has to be a balance. To that end, having a good comprehensive plan that is clear about the community's vision, then as long as a developer is in line with that vision, they can get their project approved. Make those goals and objectives as detailed as possible, to give guidance to developers.
- Want to make sure that comp plans have documented support for a certain vision so that when developments are proposed, it is clear that it's consistent with the community's vision.
- Unique challenge is to the retail environment. COVID is speeding up the online shift that was already happening.
- The village's challenge is the fact that it is built out. There are some buildings that are not being utilized to their fullest potential in terms of residential use.

Key Opportunities to Economic Development:

- Proximity to Erie Canal a big draw. The canal and walking distance to things.
- Fairport is a good market for young professionals and empty nesters who want to stay in the community.
- Walkability of the village.
- Fairport is easy to work with and gets developers through the process. They still have eye on what's good for the village.
- Opportunity for the village to do a remodel to the north, overnight stay buildings (i.e. AirBNB), restaurants.
- Village is open to new ideas, helpful in making things happen and getting through the process or approvals if it is good for residents.
- Market needs more smaller commercial units to rent/room for more of this development.
- OCED is awesome with new businesses, really helpful and helps businesses to grow.
- Fairport owns a lot of property and developers would like to see them sell some of it for development. Make sales of property public.
- Other states have a salon concept where a building is broken up into smaller salons so an owner has their own space but feels a part of a larger community. Could something like this work in Fairport?
- More shops in the village.
- Capitalize on boat traffic.
- Everyone is still talking about millennials driving the rental market. They are not. The best tenants are people who are downsizing baby boomers, or people coming from out of town who want something new in a nice location but don't want to invest the time and money into real estate.
- Single family homes don't pencil. Easier to build multi-family. Need for apartments.
- Smaller, boutique single family. But SFR doesn't pencil out. It's cheaper per square foot to build big houses than small houses. It would be cool to do small, boutique townhomes.
- Promoting 'office' in marketing residential uses now. Instead of a 3 bedroom, it's 2 bd plus an office. Or promoting it as a work-live space. Residential units above some kind of work space or other amenity would be interesting.
- Making larger work/live type spaces. With residential density, restaurants and other things will open up. Could see a creative company converting a warehouse. Proximity to Rochester is great.
- Features of the village that attract employees. The village is a strong selling point. We have no issue attracting young professionals. There are countless articles about how young people want an urban setting, to live where they work, etc. We're able to compete with companies that are located in downtown Rochester and midtown redevelopment because of the setting in Fairport. We have the canal. We can hold outdoor meetings along the canal. We have a vibrant entertainment/nightlife restaurant and café/bar scene. We have a lot of employees that start out as renters, but eventually come to Fairport to live because they realize it's a great place to live.

- Economic development can help sustain the tax base.
- The partnership with the Village/OCED and business community are able to work on a common goal because they realize they need each other.
- Maintaining what they have been doing, which is being responsive to trends. A lot of communities are not. Fairport was one of the first villages to truly embrace the canal for what it could offer. They realized the railroad has an appeal. We have one of the busiest crossings, let's use that. They are on the forefront of mixed-use development. That's the partnership and collaboration – vision and leadership.
- Need for multi-family housing. There is so much need for product that is a slightly more urban environment, but not quite downtown Rochester. Fairport is just a great spot with great opportunities.
- Renters are demanding higher end product and more space.
- The fastest to lease are the bigger units. Those are in the \$3,000 price range. There is a waiting list.
- The village has been doing lots of things to strengthen itself as an amenity. There have been some new developments in the village. Development in the village has been successful. The most repurposing of buildings that are there, the more you continue to create more demand for services and products. Creating critical mass. You need people to live in a place to make it successful.

ABOUT THE PROJECT

The Village of Fairport has engaged the services of Highland Planning and Urban Advisors to complete the Economic Development Study. The purpose of the study is to improve access to jobs, create a vibrant downtown, build strong relationships with the local colleges/university, attract high-quality commercial activity in key locations, and position Fairport as a regional tourism center. In addition to the economic profile of the Village, the study includes an in-depth analysis of the economic development strengths, weaknesses, opportunities and threats (SWOT analysis) in the Village of Fairport.

MEMO

To: Martha Malone, Office of Economic Development (OCED)
From: Highland Planning and Urban Advisors
RE: Village of Fairport Economic Development Study – Vision & SWOT discussion summary
Date: September 10, 2020

OVERVIEW

Members of the OCED board participated in brainstorming meeting on September 8, 2020 to discuss a vision for economic development in the village as well as strengths, weaknesses, opportunities, and threats. This memo contains a summary of that discussion and is presented in draft form to facilitate further discussion by members of the OCED board. Members of the board presented included Donna Stefano, Leslie White, and Martha Malone.

VISION

A vision for future economic development in the village is, by nature, broad and forward thinking. Whereas a mission statement applies to where an organization is at and what it does, a vision describes where an organization wants to be and the goal for the future.

- Mission = where we are/what we do now¹
- Vision = Where we want to be/what is our goal for the future?

¹ FIDA's mission statement: "The Village of Fairport Industrial Development Agency (FIDA) commits its resources, expertise and energies to creating a local economy that is healthy and vibrant. Through the collective efforts of our Industrial Development Agency, Urban Renewal Agency and Local Development Corporation, we are actively promoting the Village of Fairport as a great place to live, work and invest. FIDA fosters public improvements and private investments and acts as a catalyst to: • expand economic opportunities within the Village, provided by commercial and industrial development, with a strong emphasis on the Erie Canal waterfront; • maintain, improve and expand the existing housing stock and enhance the quality of the overall living environment of the Village."

Members of the OCED board were led through a discussion of vision with the following questions:

What would your community be like if you had the power to make it any way you wanted? Where would people live? Where would they work? Where would they shop? What would visitors do? How would you get there?

- Less vehicular traffic – community members and visitors feel like they can and want to walk to their destinations within the village
- Prosperous
- Collaborative environment for local businesses
- Organic, ground-up collaboration among businesses
- People of all ages and backgrounds are interacting together in physical spaces
- There is a variety of businesses serving diversified needs
- It is more like an urban, walkable neighborhood, like Brooklyn
- Less homogenous in terms of people, music, and food
- Full occupancy of commercial space
- Businesses are open after 5:00 pm
- Charming design and signage
- Activity off of Main Street (West Ave, High Street)

What problem are we solving for the greater good?

- Outside economic forces on Main Street (see Threats)
- How to incentivize property owners to align with our vision
- Economic viability
- Localization of services for residents (i.e. can residents get everything they need in the village?)
- Perception of doing business in the village – red tape, onerous policies
- Attracting visitors from near and far

Who and what are we inspiring to change?

- Visitors - to be drawn to Fairport's unique offerings
- Residents - and where they spend their time and their habits (i.e. walking, shopping)
- Property owners - balancing profit and vision
- Developers - their view of village opportunities
- Merchants - business opportunities

How would you describe your vision in one word?

- Vibrant
- Diversified
- Cornucopia
- Robust

STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS (SWOT)

A SWOT is a strategic planning technique used to help an organization or agency evaluate its current position and strategy by addressing internal and external factors and develop awareness of all the factors involved in building a long-term economic development strategy. Below is a summary of the discussion.

Strengths	<i>Internal factors</i>	Weaknesses
<ul style="list-style-type: none"> • Strong tax base • Services close to home • Desirable community • Walkable • Schools • Access to trails & parks • Canal • Affluent community • Having a local IDA • Accessible, nimble local government • Safety • Fairport Electric • Strong neighborhoods • Shopping opportunities • Community pride • Beauty/tree-lined streets • Bars and restaurants • Businesses can attract employees • Free Parking • Merchants/chamber organizations 		<ul style="list-style-type: none"> • Exclusive community- hard for newcomers to fit in • Homogeneous- parochial • Route 250/31 through traffic • Commercial rents are too high • Vacancies • Seasonal business environment • No full size grocery • Business hours after 5:00 pm • Homogenous business mix
Opportunities	<i>External factors</i>	Threats
<ul style="list-style-type: none"> • Vacant space in iconic buildings • Public arts committee • Chance to elevate the arts community • Festivals • History is a selling point for tourism • Train • South bank/North bank investments • Destination spaces • Leverage free parking and connections to destinations • Activate connections for walking/biking • Activate alleys and sidewalks • Infrastructure to attract diverse uses (such as office, small scale industry) • Hotel • Small boats (kayaks) • Leverage the Finger Lakes Tourism/Wine Trail • Attract new residential developers 		<ul style="list-style-type: none"> • Aging population • Shrinking school age population • Eastview Mall • Rents are too high or too low • National retail environment • Perceptions of being unwelcome to diversity • Route 250 hurts walkability • Canal is controlled by NYPA, could decide not to open it • Spencerport/Victor/Downtown Rochester • Local taxes – perception they are high • Poor design

REFERENCE MATERIALS

Examples of a Vision Statement:

"Economic Vitality Vision Statement Des Moines is an economically self-sustaining community that maximizes the potential of its natural assets. Development is encouraged in order to support healthy commercial areas and City services. Successful local business districts are attractive destinations for residents as well as visitors. Developed areas incorporate green space, public art, residential density and visitor appeal, and draw people to work, shop, stay and play in Des Moines."

"To foster a vibrant, prosperous and growing Fort Wayne through extraordinary community development."

"To encourage the development of a diverse economy in the region while recognizing the need to maintain a balance between attracting new investment, supporting existing businesses, fostering local entrepreneurship, and strengthening the region's key industries. This will enhance the region's quality of life by identifying and promoting projects for funding that strengthen the regional economy leading to job creation."

Prompting Questions for Discussion

Strengths

1. What is the village known for? What do residents and businesses love about Fairport?
2. What resources are readily available?
3. What is OCED doing well?
4. What do residents love about the Village? (e.g. Annual Fairport Fair)

Weaknesses

1. What do residents/businesses dislike about the Village?
2. What is OCED doing poorly?
3. What resources does the village lack?
4. What's the main area that needs to improve immediately?

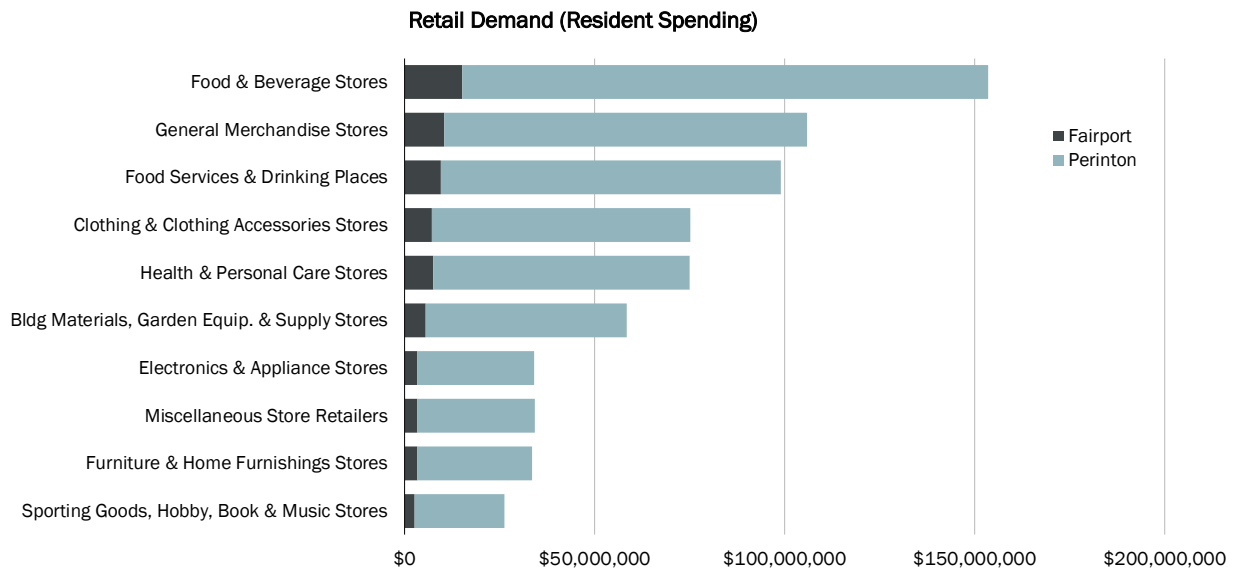
Opportunities

1. What are the unique features/elements that differentiate the Village from the region?
2. How is the Village/region changing – economically, socially?
3. What opportunities have been passed, but are still available? (e.g. employers - industries, retail)
4. What would be the ideal opportunity for the Village?
5. What are others in the region ignoring that the village can adopt in its favor?

Threats

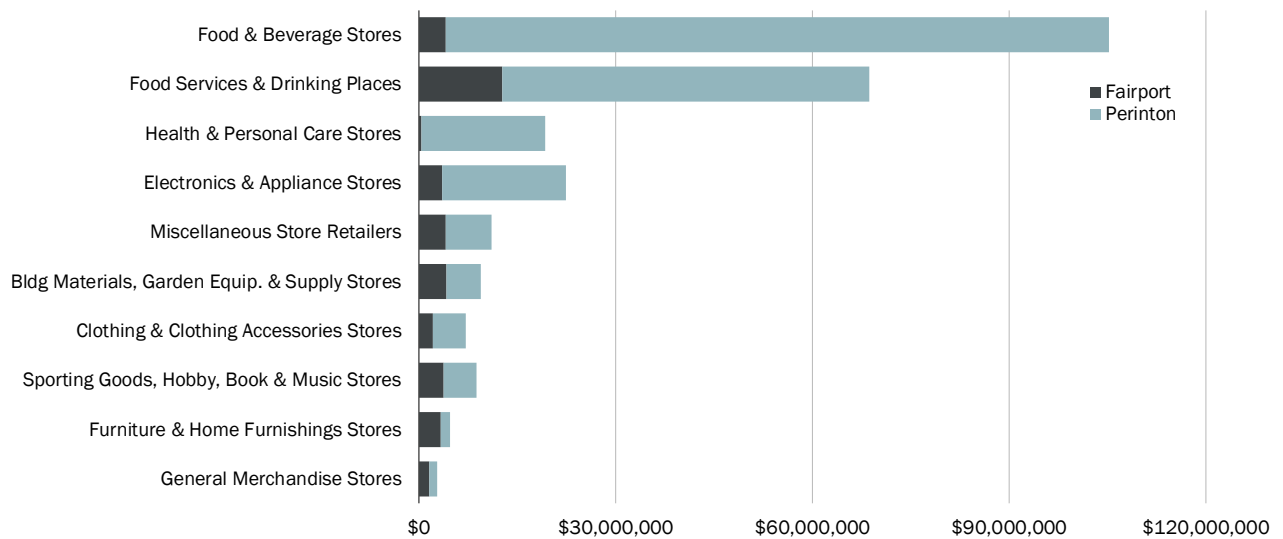
1. What are the other nearby alternative employment/residential locations?
2. Has there been growth and development in other parts in the region lately? Where and why?
3. Are employer/resident preferences changing in a way that could negatively impact the village?

Figure 44 Retail Demand (Resident Spending), Village of Fairport and Town of Perinton



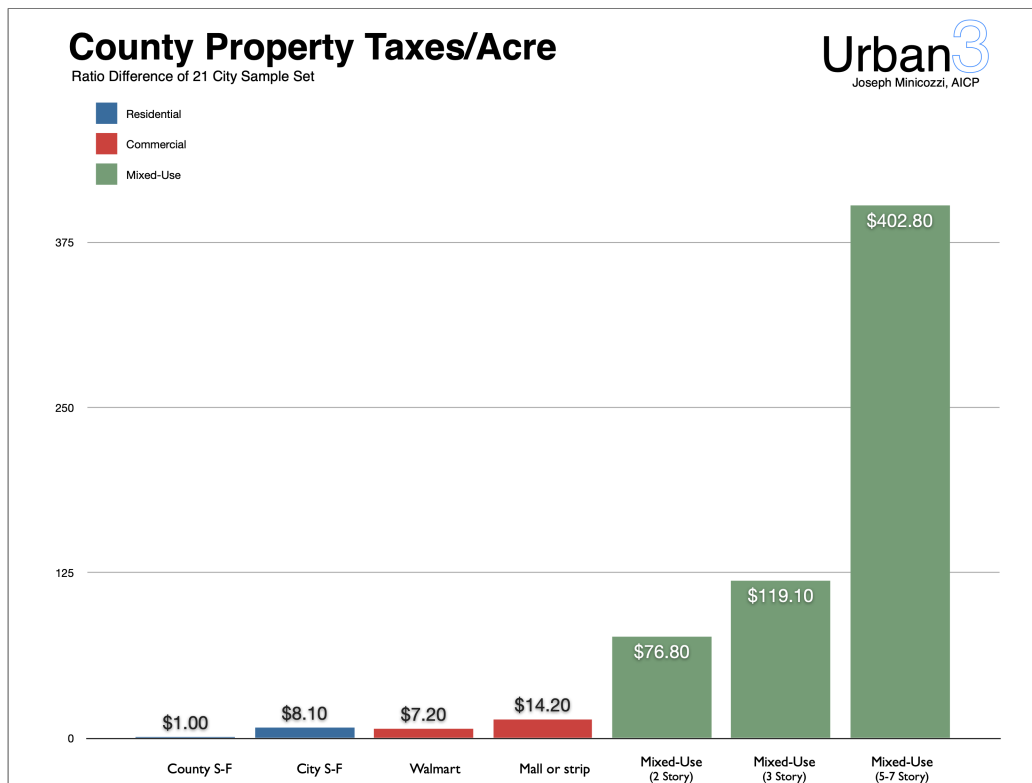
Source: ESRI & Urban Advisors

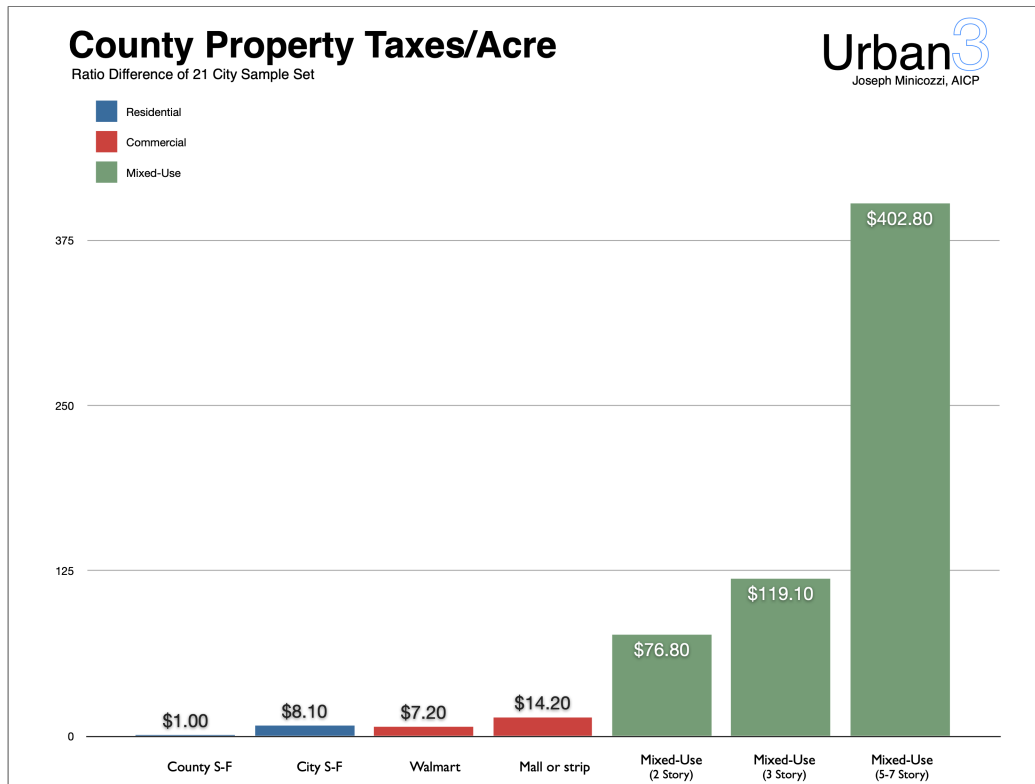
Figure 45 Retail Supply (Store Sales), Village of Fairport and Town of Perinton



Source: ESRI & Urban Advisors

Figure 46 Efficient Land Use and Tax policy







MEMO

To: Martha Malone, Office of Economic Development (OCED)

From SWBR

RE: Village of Fairport Economic Development Study – Infrastructure Inventory

Date: January 14, 2021

FINDINGS: VILLAGE OF FAIRPORT INFRASTRUCTURE

Independent of market and demographic conditions, the Village of Fairport has unique infrastructure offerings that support its existing economy and offers opportunities for future economic growth. Some of this infrastructure is traditional transportation and utility infrastructure. Fairport also has unique tourism, event and organizational infrastructure.

- **Tourism Opportunities:** The Village has a strong combination of visitor amenities and attractions that support the tourism industry. The Erie Canal brand is very strong, and recognized throughout the world. Fairport has capitalized on that brand and is a leader in developing infrastructure, promotions and organizational capacity to progress that brand. An opportunity may exist to more strongly brand individual districts within the Village Business area (ie. Four Corners, North Main, Erie Canal & the Can Company). The waterfront access, transient docking, parks, open space, historic structures and intact neighborhoods are important components of the Village's tourism infrastructure, as are the restaurants and small-scale retail shops. Opportunities for enhancing the industry may include a variety of lodging options, a density of food and shopping experiences and public amenities (ie. rest rooms, wireless internet and laundry). Deterrents to tourism may include challenging highway, transit and air travel access – as well as seasonal challenges such as the closing of the Erie Canal in winter.
- **Small Scale Mixed-Use Development:** The Village Fairport has a variety of small buildings and development parcels that could accommodate new small-scale, mixed-use development. The Village is well served with utility infrastructure, including very affordable and reliable electricity. There is an ample parking supply to accommodate modest growth, and opportunity for expanded parking to accommodate mixed-use and shared parking scenarios. Residential development within the business district can share existing parking infrastructure. Small scale growth can be supported by unique and locally driven IDA and economic development tools.

- **Infrastructure:** The Village is well positioned to accommodate infill development and the expansion of use of most of its properties. Fairport electric offers an extremely low electrical rates with a high level of customer service. Storm water and sanitary services are aged, but have good capacity and are serviceable (a limitation on sanitary sewer capacity exists in the north-east section of the Village from the Lidestri Plant and downstream). Village owned streets are well maintained and operate at acceptable levels of service. New York State and Monroe County own several streets within or bordering the Village, and work closely with the Village on operations and maintenance.

How Walk Score Works

Walk Score helps you find a walkable place to live.

Walk Score is a number between 0 and 100 that measures the walkability of any address.

[Learn about our methodology.](#)

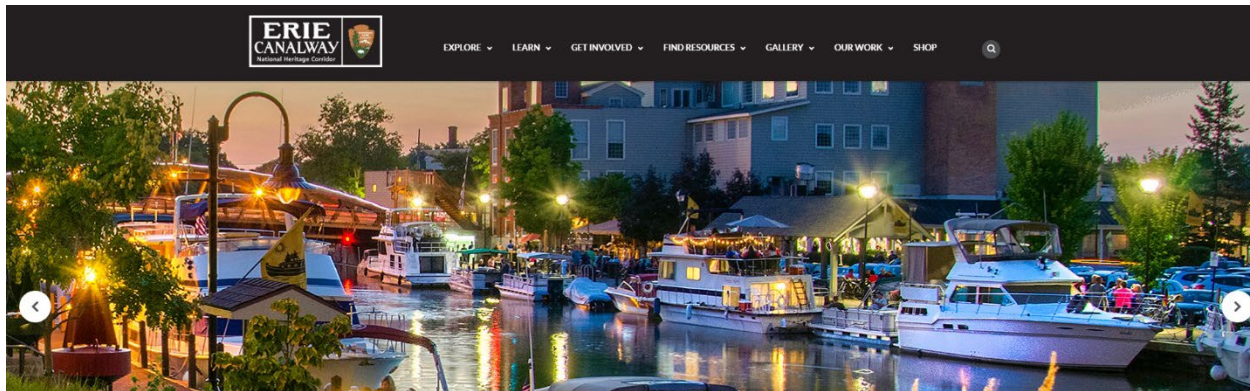
Walk Score	Transit Score	Bike Score
90-100		
	Walker's Paradise Daily errands do not require a car	
70-89		
	Very Walkable Most errands can be accomplished on foot	
50-69		
	Somewhat Walkable Some errands can be accomplished on foot	
25-49		
	Car-Dependent Most errands require a car	
0-24		
	Car-Dependent Almost all errands require a car	

- **Walkable:** The Village of Fairport currently has a “Very Walkable” Walk Score of 74. In Board reviews, stakeholder meetings and resident surveys, walkability was an important factor in relocation and a part of Fairport’s brand. With certain improvements, Fairport could strive to be a “Walker’s Paradise”. This improved walkability can drive a quality experience, new residents, safer conditions, continued branding and an improved business climate. Fairport could then work on being a “Biker’s Paradise”, perhaps add micro-mobility (electric bikes, scooters, etc) and eventually transit.
- Some environmental conditions exist in the north central portion of the Village along the Thomas Creek corridor. Wetlands, a floodway and flood plain restrict some development opportunity along the Thomas Creek corridor and the former railroad ROW now owned by OCED. It is recommended that the floodway of Thoms Creek be hydrolically studied to determine if mitigate measures such as reducing downstream restrictions (ie the Main Street bridge, railroad culvert, O’Connor Road bridges) could potentially lower the flood elevations.
- Real estate values are high in the Village of Fairport relative to Monroe County. The Village’s quality of life, walkability, character of neighborhoods, tree-lined streets, Erie Canal proximity, affordable electric service, intact commercial district, good school district and historic resources likely contribute to those values. These characteristics should be retained in order to protect property values.

VISITOR INFRASTRUCTURE

The Village's tourism infrastructure is strong. It has a powerful brand as a progressive Erie Canal destination. The Village has developed tourism and recreation assets that add significant value.

Brand Value & Organizational Capacity: In 1998 the National Park Service determined that the Erie Canal was "of exceptional value and quality in illustrating and interpreting the national and cultural themes of the nation's heritage". In 2000, the United States Congress signed a law designating the Erie Canal as a National Heritage Corridor. In 2002 the National Park Service and the State of New York, formalized the Erie Canalway National Heritage Corridor and Commission.



The land along the Canal is owned by New York State and managed by the New York Canal Corporation, an entity within the New York State Power Authority.

The Erie Canal is one of the Village's most prominent features. It is the reason for the initial founding of the Village, and the source of its name. The Canal is the focus of many activities in the Village including the annual "Canal Days" festival, which attracts over 200,000 people annually to the Village. It is a recreational venue for residents, attracts visitors to local shops, and contributes to the setting for the business district and residential neighborhoods.

Amenities: Most commercial development in Fairport is concentrated along Main Street and in the Village Landing, Packett's Landing, and Box Factory. There are over 300 Fairport business merchants. Most are small in size, and clustered in the Main Street business area. The business mix includes retail, restaurants, banks, professional service providers, and small, mid-sized, and small-scale manufacturing companies.

- **Food & Beverage:** Approximately 20 restaurant, bar & brewery establishments
- **Accommodations:** One Inn with 4 guestrooms; One Bed & Breakfast with 2 guestrooms
- **Retail:** 30+ Retail shops
- **Restrooms & Services:** Transient Boat docks with electric & water; Dockmaster on duty in

summer; Three banks and a Public library; Missing are publicly accessible restrooms, showers and/or laundry

- Wayfinding: Fairport has a modest wayfinding program that could be improved
- Districts & Neighborhoods: Identifiable districts including the Canal area, North Main Street, the Four Corners and Parce Ave./American Can; Additionally, there are intact residential neighborhoods surrounding the business district

Parks & Open Space: The Erie Canal corridor contains the most visible public open space, park and recreation opportunity within the Village. The Canal trail is a multi-use trail that is open all year and experiences significant use. The Village provides temporary and seasonal docking facilities at Packett's Landing, from which restaurants and shops are easily accessible. The Colonial Belle, a tour boat, operates from the south side of the Canal near Packett's Landing. Kayaks and hand powered craft are launched and rented out of a west side location. Kennelley Park, on the south side of the Canal off West Avenue, features a gazebo with concerts during the summer. The Thomas Creek Wetland Walk, west of Liftbridge Lane, is just over 13 acres and includes parking, boardwalks, and observation platforms. The waterway portion of the Erie Canal operates for approximately 8 months a year, leaving almost 4 months with no water recreation.

Additionally, Village residents and visitors enjoy a number of parks and recreational activities within the Village, and benefit from facilities and recreational programs operated by the Town of Perinton. Potter Park contains 10 acres and has been developed for recreational use. The Village of Fairport owns the land and leases it to the Town of Perinton. The Town runs recreational programs and maintains the facilities. Fields at Johanna Perrin Middle School, the Brooks Hill Elementary School and Minerva Deland School also function as neighborhood parks. Mini-parks have been developed as part of "cluster" subdivisions in the Winding Brook (2.93 acres), Park Circle Drive (1.6 acres), and Misty Pine (2.2 acres) neighborhoods.

Community Parks within one mile of the Village include Fellows Road Park, Center Park, and Perinton Park, all located within and operated by the Town of Perinton. Regional/Metropolitan parks serving Fairport residents include Monroe County's Powder Mill Park, located on Route 96 near Bushnell's Basin.

The Town of Perinton offers boat launching facilities at its Ayrault Road Launch. Canoe launching is available at Perinton Park. The Crescent Trail Association maintains hiking trails in the Town of Perinton, which connect to the towpath trail and other regional trails.

Indoor recreation is provided at the Perinton Community Center and the Lion's Den Teen Center at Potter Park. Meeting rooms are available at the Community Center, Potter Memorial Building, and the Fairport Public Library. In addition, several churches provide meeting space for non-profit organizations.

- Festivals & Events
 - Fairport Music Fest: Since 2005; Two days in August; Over 30 bands; Food trucks and vendors; Children's Hospital Philanthropic
 - Fairport Canal Days Art Festival: Two days in early June; Attracts 200,000+ visitors with

over 200 vendors

- Fairport Oktoberfest: Two days in October
- Parades: On Memorial Day and Independence Day
- Fairport Farmer's Market: Saturday morning's during the summer

UTILITIES

The Village is well served by utility infrastructure and has available capacity to accommodate growth. The municipally owned electric company is renowned for service and low rates.

- **Electric:** The Fairport Municipal Commission (FMC), owned and operated by the Village of Fairport, is one of the 47 municipally owned power companies in New York State. The company purchases electricity from the New York Power Authority and supplies inexpensive electricity to more than 16,000 customers in the Village of Fairport and the Town of Perinton. The main Service Center is located on Liftbridge Lane East, and a sub-station is on Turk Hill Road. Fairport has been designated an Electric Vehicle (EV) Model Community for its progressive stance on an electric service fleet and providing EV charging stations for the public.
- **Sewer:** The Village Department of Public Works (DPW) operates a sanitary sewage collection system, which serves most areas of the village. A few homes are served by septic systems, and are not connected to the village system. The DPW also maintains a separate storm water drainage system, both open channel and conduit, in most areas of the village. Capacity exists to accommodate moderate growth in almost all areas of the Village. An exception is in the north-east area of the Village at the point where LiDestri Foods discharges its waste, and downstream from that location. The biggest challenge with sanitary sewer system is age. Much of the system was built between 1919 and 1920. The Village is currently televising lines and intends to do a major re-lining project over the coming years.
- **Water:** The Monroe County Water Authority operates the water distribution system for all of the village and the town. The Water Authority's main source of water is Lake Ontario. The water is filtered and treated with disinfectants and fluoride at the Authority's Shormont Water Treatment Plant prior to distribution to the Village of Fairport. Capacity exists to accommodate moderate growth. The system was relined over the course of 2015-2016.
- **TV & Internet:** All village residential and commercial locations have access to cable television provided by Time Warner of Western New York. Time Warner shares poles and underground trenches with FMC. Greenlight, Verizon and other cell service and internet providers are now offering service within the Village.

MEMO

To: Martha Malone, Office of Economic Development (OCED)

From SWBR

RE: Village of Fairport Economic Development Study – Main Street Special Area Analysis

Date: May 4, 2021

FINDINGS: MAIN STREET SPECIAL AREA SUMMARY

'Main Street' is the business core of the Village of Fairport. In Fairport, the term 'Main Street' can be used literally as defined by properties fronting on North or South Main Streets, or it can be used metaphorically as being the main business thoroughfare that may bleed down connecting side streets. In this discussion, we believe the opportunities that are identified for North and South Main Street, are similar, and likely enhanced, by including the bordering properties accessed by Main Street or by West Church street, Pleasant Ave, Liftbridge Lane, the former CSX ROW, High Street and Parce Ave.

To go a step further, Fairport's entire downtown business district, not just Main Street, has similar opportunity for economic growth. One overriding opportunity is to treat Main Street and the entire business district as a mixed-use zone, rather than specific residential, business and industrial zones. This zone could have relaxed use restrictions, while tightening the regulation of building form and design.

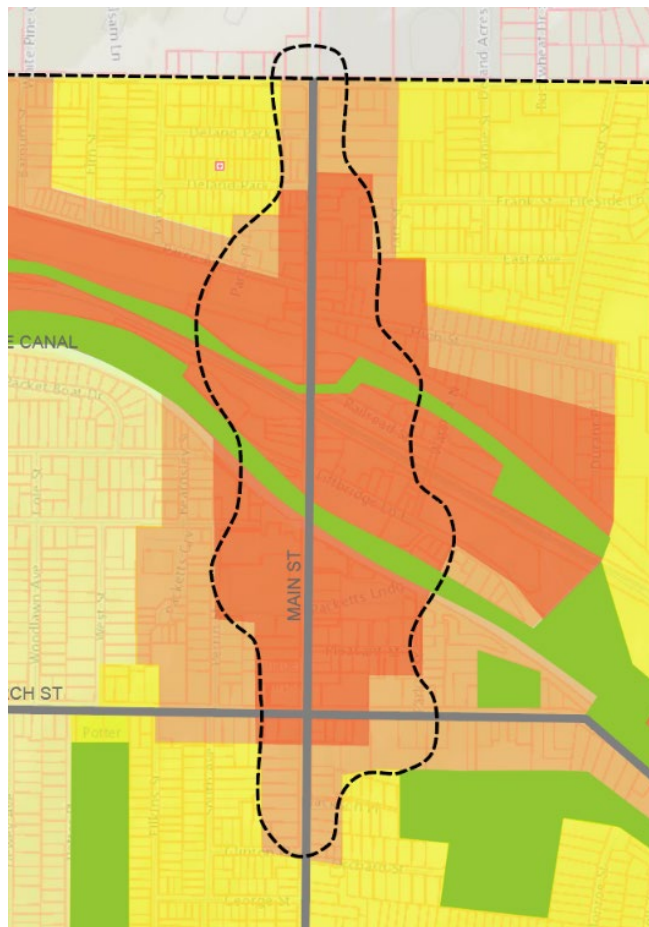


Figure 1: Main Street Special Area Overlain on Potential Mixed-Use Area

TRENDS

Nationally, several trends are being seen in village downtowns and neighborhood commercial districts. Fairport's Main Street should look to these trends for potential emulation.

Placemaking: It has been documented that younger generations, including Millennials and Generation Z, are more likely to choose a place to live and then seek out a job, rather than find a job and move to that location. Because of this shift in thinking, municipalities are placing a greater emphasis on creating great places to live and play as a means of job creation.

Housing (smaller; rental; MU; walkable): Housing preferences by both younger markets and senior markets are for smaller homes in walkable places. High housing values are located in mixed-use neighborhoods where people are closer to their destinations. Interest in home ownership is less in the Millennial and Gen Z populations, with a strong demand nation-wide for rental. Outdoor spaces, fast internet and good storage are sought after amenities.

Mixed-use: Mixed use places create the highest real estate value in urbanized areas, and municipalities are trending to zone more properties for mixed use – often at higher densities. An emphasis is being placed on the performance, design and form of buildings rather than what use is occurring within. Mixing uses can place origins and destinations closer together and encourage walking and biking over automobile travel. Mixing uses also offers opportunities to share parking and reduce the concentration of peak travel demands.

Form based codes: Supporting the popularity of mixed-use zones are codes that still regulate land development, but with an emphasis on performance, design and form – as noted above. Dimensional and use regulations still exist, but often are either relaxed or changed.

Shared & flexible parking requirements: Trends in mixed-use, density and walkability lead to a different approach in regulating parking. Shared parking, alternative modes of transportation (walking, biking and transit in particular) and trends towards fewer cars per household all suggest the reduction or elimination of parking in certain locations.

CHALLENGES

The Village of Fairport and it's Main Street has some recognizable challenges, both external and internal.

External

- Both the economic Region (Genesee Finger Lakes/Rochester Metropolitan area) and the Village of Fairport have a low, or declining, population growth.
- The Village of Fairport, similar to most of the upstate NY region, has an aging demographic with shifting market demands.
- Medium to low market rents are in conflict with high reconstruction and new construction costs. The cost for new construction demands higher rent and sale prices in order to make developer pro-forma's pencil out. This is challenging to achieve in upstate NY where market rents are generally lower, but Fairport has a strong market that appears to be working in the higher end residential product, and could potentially work in a commercial market. Renovation and small infill projects could potentially contribute to more affordable units.

Internal

- There is an economic leakage of money spent by Village residents – meaning residents currently spend their retail and service dollars at businesses outside of the Village. The exception is the food service and drinking establishments.
- The Village has a strong local market that is supported by residents, but has been limited in its ability to generate a regional market, maybe contributed to by its lack of highway connectivity and geographic location on the edge of the metropolitan area.
- The Village has encountered zoning code issues, particularly relative to parking requirements, that have hindered development. Additionally, the adoption of a zoning code has created many historic parcels that existed pre-zoning, to be classified as non-conforming because the code is more strict than the existing conditions. Pre-existing properties are less attractive to invest in than conforming properties because they require variances to improve or remodel and create additional risk for developers or owners.
- Key private real estate holdings within the Village are tied up as investments and not being developed. Real property boundaries and configurations are sometimes convoluted requiring extensive land assembly and subdivision projects to get land development ready, or even ready for sale.
- Environmental constraints exist within the northern Main Street area including floodways and wetlands.
- The Erie Canal and CSX Railroad Main Line create barriers for north-south circulation within the village, and concentrate and/or isolate travel to the Main Street and Turk Hill Road corridors.
- Fairport, like many similar Village downtowns, has a perceived lack of parking despite evidence of availability even during peak hours.

OPPORTUNITIES

Fairport's Main Street has many opportunities to capitalize on National and local trends, and to overcome external and internal challenges.

- Continue to leverage strong housing market;
- Develop new and attractive workforce & creative class housing (MF housing, ADU's, zoning changes);
- Attract millennial and senior residents with more disposable income;
- Increase real estate tax w more development density;
- Continue established placemaking efforts to stay positioned as a leader;
- Expand the mixed-use development of the Village through zoning and development;
- Fix non-conforming uses; allow ADU's; reduce minimum housing size; encourage multi-family housing; promote mixed-use development; ease parking requirements and ease height restrictions through zoning code changes;
- Utilize Developers Request for Proposals to pro-actively vision, market, sell and develop infill opportunities.
- Capture retail leakage by identifying target retail markets, designing competitive retail business niches and successfully capitalizing on the market opportunity; "leaking markets" for Fairport include retail sales in general merchandise, clothing, building materials, food stores and health & personal care stores.
- Leverage Town-wide and regional demand for food, entertainment & drinking to fill commercial space downtown;
- Capture outbound commuters by creating opportunity for more small and mid-scale employment opportunities within the Village and within walking distance;
- Leverage Fairport's higher than average incomes & education by marketing local products to that demographic;
- Capture professional, technical and scientific overflow business growth from Town of Perinton businesses by offering unique mixed-use and walkable workplace settings;
- Continue to brand and market Fairport's Canal, friendliness and walkability;
- Develop the Thomas Creek Corridor as a public realm destination and asset.

ECONOMIC DEVELOPMENT & JOBS

Small Scale Mixed-Use Incremental Development

Fairport's Main Street has a variety of small buildings and development parcels that could physically accommodate new incrementally developed, small-scale, mixed-use development. The Village is well served with utility infrastructure, including very affordable and reliable electricity. There is an ample parking supply to accommodate modest growth, and opportunity for expanded parking to accommodate mixed-use and shared parking scenarios – potentially along the CSX railroad ROW. Residential development within the business district can share existing parking infrastructure. Small scale growth can be supported by unique and locally driven IDA and economic development tools. Each business opportunity should be justified with a strong business plan including market research, product offerings and financial viability. Specific opportunities for Main Street may include:

- Neighborhood Retail: Additional small-scale grocery, bakery, pharmacy and hardware to support Village residents
- Specialty Retail: Gift shops, athletic goods, galleries and other retail marketed to visitors and the regional population
- Food & drink: Building on the existing restaurant and bar product, there still appears to be room in the town-wide and regional market for growth
- Small scale office: Office uses on Main Street can be a daytime compliment to residential uses; office space could be in the form of incubator, live work
- Small scale manufacturing: A trend in filling existing affordable downtown space are small scale manufacturing businesses, much like Turning Point Signs. New technologies in printing, sewing, food processing and others are bringing some manufacturing to a small scale with potential retail outlets. With new technologies, artisan businesses are better able to produce one-off and custom products.
- Live/work: Creating downtown residential units that have an associated space to operate a small-scale business out of.

To support incremental development, the Village/OCED can continue to focus on infrastructure.

- Expanded Placemaking: To attract creative class businesses and residents to Main Street and the downtown district. The Erie Canal is an excellent existing example. Other opportunities include Public Market enhancements, a pocket park at the Thomas Creek crossing and a gateway park at the Four Corners.
- Streetscape: Enhance the public realm and “complete” nature of Main Street with pedestrian improvements, bike ways, street trees, amenities, safety, reducing curb cuts, in-fill development, etc.
- Parking: Create shared parking opportunities in targeted locations (particularly along the CSX RR tracks) to support growth and to allow development of parking lots that are in poor locations (on the Canal and on street frontage).

Made in **PLACE**



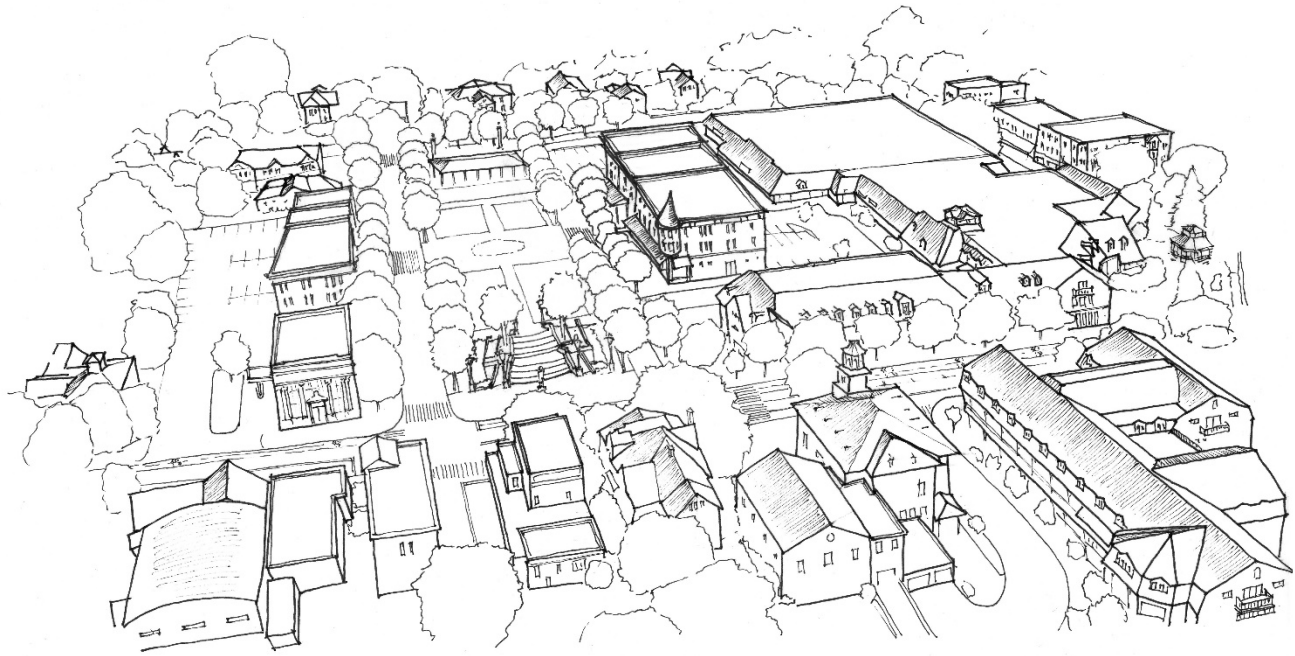
Resources for Small Scale Manufacturing



Buffalove Incremental Development Company



Placemaking & Infill Development on North Main and along the Thomas Creek Corridor



Place-making & Mixed-Use Density on South Main and at the Village Landing



Public Realm Improvements and Historic Preservation at the Four Corners

Tourism

The Village has a strong combination of visitor amenities and attractions that support the tourism industry. The Erie Canal brand is very strong, and recognized throughout the world. Fairport has capitalized on that brand and is a leader in developing infrastructure, promotions and organizational capacity to progress that brand. An opportunity exists to more strongly brand individual districts within the Village Business area (ie. The Four Corners, The Landing, Liftbridge Lane, Parce Ave. area and a reimagined Thomas Creek corridor, among possible others). The waterfront access, transient docking, parks, open space, historic structures and intact neighborhoods are important components of the Village's tourism infrastructure, as are the restaurants and small-scale retail shops. Opportunities for enhancing the industry may include a variety of lodging options, a density of food and shopping experiences, continued 'place-making' and public amenities (ie. rest rooms, wireless internet and laundry).



The Liftbridge Lane Neighborhood: The Heart of Fairport's Tourism Infrastructure

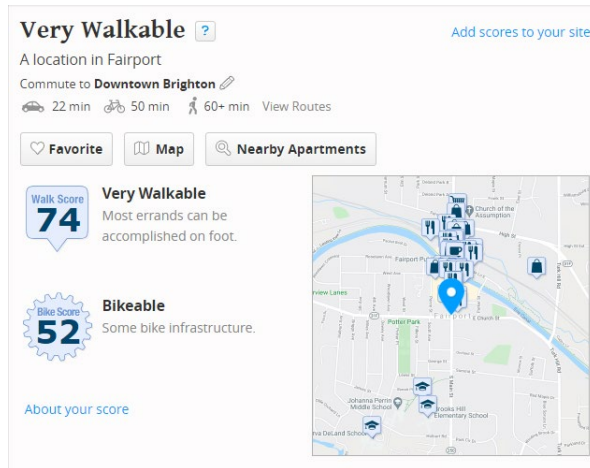
- Gas: Natural gas for heating and cooking is supplied to most village homes and businesses by Rochester Gas & Electric. Gas mains are located in streets and services are provided to most buildings.
- Trash & Recycling: The Village DPW provides year-round trash and garbage pickup, as well as leaf and yard debris collection. Residential collection of recyclable materials is done by Waste Management Corporation in conjunction with the Town of Perinton.

ACCESS, CIRCULATION & TRANSPORTATION

The Village of Fairport has a well-developed pedestrian network and is rated as a highly walkable community. There are some challenges related to vehicular circulation and connectivity.

- In 2010 the Village of Fairport and Genesee Transportation Council commissioned a Circulation, Accessibility & Parking study. The plan recommends several mobility related improvements:
 - A transit shelter is recommended at the stop opposite Railroad Street
 - Improvements to the Village Landing Traffic Signal
 - Consideration of pursuing a jurisdictional transfer of Main Street from NYSDOT to the Village
 - Main Street curb extensions at Pleasant Street, on the Village Landing and at Lift Bridge Lane
 - Adding ADA ramps
 - North Main Street Pedestrian enhancements
 - Improved Wayfinding Program and Bike Share markings
 - Explore a Trolley/Shuttle
 - Improve pedestrian crossing of Canal, including at Parker Street and mid-way between Parker Street and Main Street
 - Gateway improvements at the Four Corners
 - Shared access and parking plan for Four Corners area
 - Redevelopment of the North Bank, west of Main Street
 - Zoning modifications including definition of terms, parking modifications and street design modifications

- **Walkability:** Sidewalks exist along most village streets and are generally in good to excellent condition. Walk signals have been installed at busy intersections, and curb cuts for handicap and bicycle access are becoming common throughout the village. A limited number of non-street walkways, which connect streets and cul-de-sacs via "short cuts," are also maintained by the village as a convenience to pedestrians.



- **Erie Canalway trail:** Connects Albany to Buffalo, through the Village of Fairport; Functions as an East-West multi-use trail through the Village; located on North side of Canal with connections across the Canal at Parker Street, Main Street and West Church Street
- **Main Street:** Functions as the North-South pedestrian spine through the Village; Has sidewalks on both sides of the street; cross-walks are regularly located on South Main Street, but could use safety improvements; Crosswalks are irregularly located on North Main Street and pedestrian areas are poorly defined in areas
- **Connectivity:** The Village is laid out in pedestrian scaled grid with sidewalks on both sides of most streets; areas of connectivity are challenged by the Canal, Railroad tracks, Thomas Creek, large property holdings, dead end streets and lack of infrastructure
- **Destinations/Amenities:** The Village of Fairport is approximately 1 ¼ mile square, and the business district is approximately ½ mile square, offering walking proximity to most of the population; Approximately 70% of the Village is within a ½ mile walk of the Erie Canal Lift Bridge; The business district includes most of the Village's amenities and destinations, including the library, restaurants, food stores, gyms, etc; The three schools are located at the southern boundary of the Village; the majority of protected open space is in the southern half of the Village or along the Erie Canal corridor

- Pedestrian Character: Most of the Village has sidewalks on both sides of the street, marked crosswalks, tree-lined streets, front porches and walkways to homes, and active storefronts; The 2010 Circulation, Parking & Access Study identifies portions of Main Street that lack strong pedestrian character

- Street System

Functional and Jurisdictional Classifications of Roads: Roads in Fairport and the surrounding area may be classified by function and by jurisdiction. Jurisdiction denotes the governmental agency responsible for the road, such as U.S. Highways or Interstates, State Highways, County Highways, and Village streets.

Principal Arterials are limited access highways. No such highways are located within the Village. However, I-490 serves Fairport via Rt. 31F (4 miles and 9 minutes to Four Corners) and Rt. 31 via Rt 250 (3.8 miles and 8 minutes to Four Corners). Fairport is also accessible from I-90 (7 miles/15 minutes to Four Corners) via Rt. 96 and Rt. 250 or Turk Hill Road.

Fairport is located at the crossroads of two Minor Arterials: NYS Route 250 (Main Street) and NYS Route 31F (East & West Church Street).

Collector Roads include Turk Hill Road and Whitney Road, both Monroe County highways, and NYS 31F/High Street.

Evaluation of Existing Roads: According to the 2010 Circulation Study, the average daily traffic (ADT) volume on Main Street is approximately 10,985 vehicles per day (vpd) ; 5,528 northbound and 5,457 southbound, comprised of 7% trucks. Due to the nature of Main Street as a mixed-use corridor, the bi-directional (northbound/southbound) traffic is split relatively evenly, with minor deviations during the commuter peaks. Motor vehicle travel speeds on Main Street are generally consistent with the posted speed limit. The level of service on Main Street, in both a current state and a future state, remains at a Level C or above.

Figure 13 - Existing Capacity Analysis

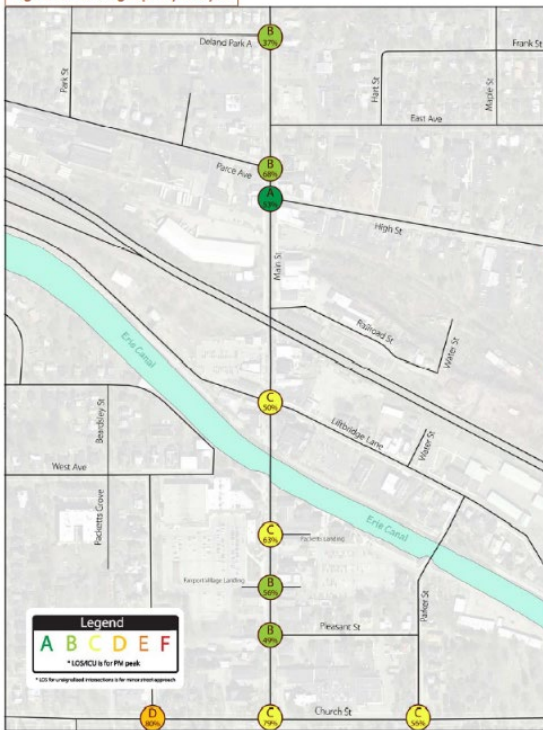
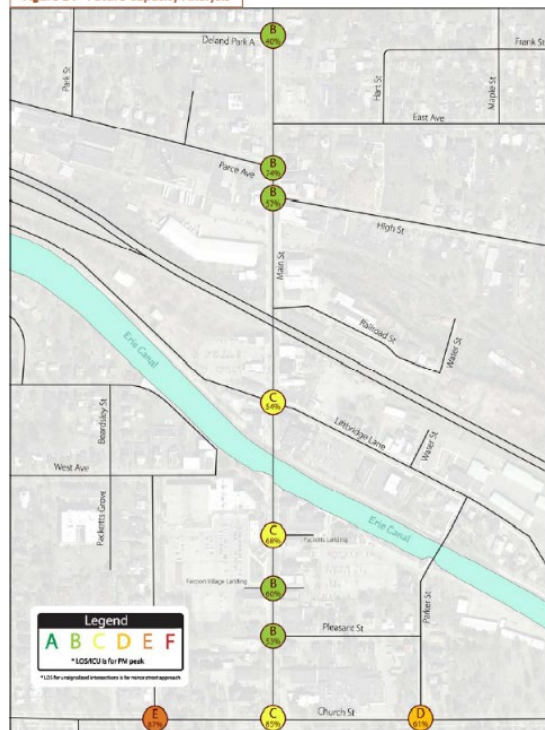


Figure 14 - Future Capacity Analysis

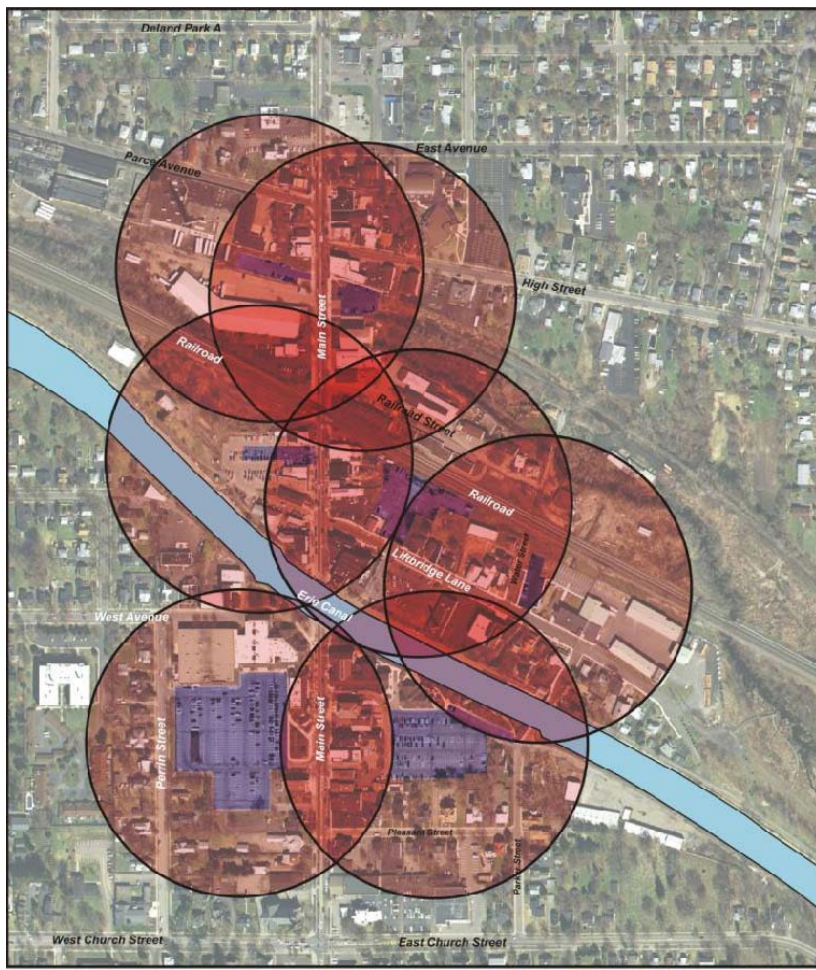


- **Bridges:** The Main Street bridge over the Erie Canal is a designated National Historic Structure which is currently being reconstructed. It has been closed to traffic for over a year, but is scheduled to re-open by the end of 2020. The Parker Street Bridge is a one-lane bridge over the Erie Canal that is also a designated Landmark. The Turk Hill and West Church Street bridges over the Canal are both located on the Village boundary and have replaced the historic Canal bridges. The Main Street bridge over Thomas Creek has been identified as a high priority for reconstruction by NYSDOT.

- **Parking:** Parking is offered in the Village's business district on- street, off-street in public lots and off-street in private lots.

On-street Parking Supply: Daytime parking is permitted on all village streets except where prohibited by signs. None of the on-street parking is metered. No overnight parking is allowed from November 1 to April 1, to allow for snow removal by DPW crews. There are approximately 122 on-street parking spaces in the commercial/business district. Approximately 57 are located on Main Street. The remaining spaces are located on Liftbridge Lane East, West Avenue, and Perrin Street. In some areas along Main Street, only short-term parking is allowed. All on-street parking spaces are within a typical 5-minute walk from the Liftbridge.

Off-street Public Parking Supply: The Village has 7 public parking lots with a total 811 spaces. All lots include public parking signs and are easily accessible.



Total Public Parking Supply: The Village of Fairport has approximately 933 public parking spaces available in the commercial/business district. In comparison, the Village of Pittsford has approximately 366 public spaces.

If the total parking supply of 1,083 was supporting office and retail space at an average rate of 3.5 spaces/1,000 SF, then the current parking supply could support approximately 309,000 SF of commercial space, not including potentially shared spaces. Fairport's business district currently has approximately (300,000 SF) of commercial space.

SMARTCODE VERSION 9.2

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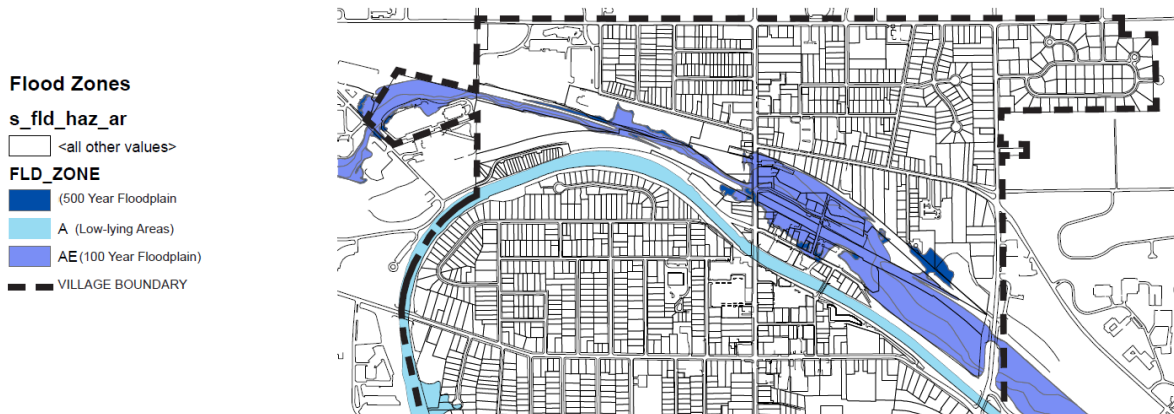
- 11

- **Erie Canal:** The Erie Canal waterway is used seasonally for recreational boat traffic. Both local and long-distance vessels pass through Fairport allowing them to summer in the Great Lakes and winter in the Caribbean. The Erie Canal Tow Path is open year-round and used by walkers, runners, and bicyclists.

ENVIRONMENTAL

Stormwater management is generally well controlled within the Village through surface runoff and sub-surface infrastructure. Thomas Creek has an associated flood plain that affects the redevelopment of portions of the Village's downtown core.

- **Flood Plains:** The Flood Insurance Study for the Village of Fairport was published in March 1984. The floodplain along Thomas Creek is located mainly between the two branches of railroad tracks. The zone along the Barge Canal in the southwestern portion of the village extends into low-lying areas west of Hulburt Avenue.



- **Wetlands:** Regulated wetlands are primarily located within the Thomas Creek drainageway and help to offer natural stormwater mitigation for the Village's downtown area.

