

ROANOKE: EMERGING NEIGHBORHOOD CENTERS VISION REPORT

November 18, 2022

Prepared by Downtown Economics, Inc for
The City of Roanoke, Virginia



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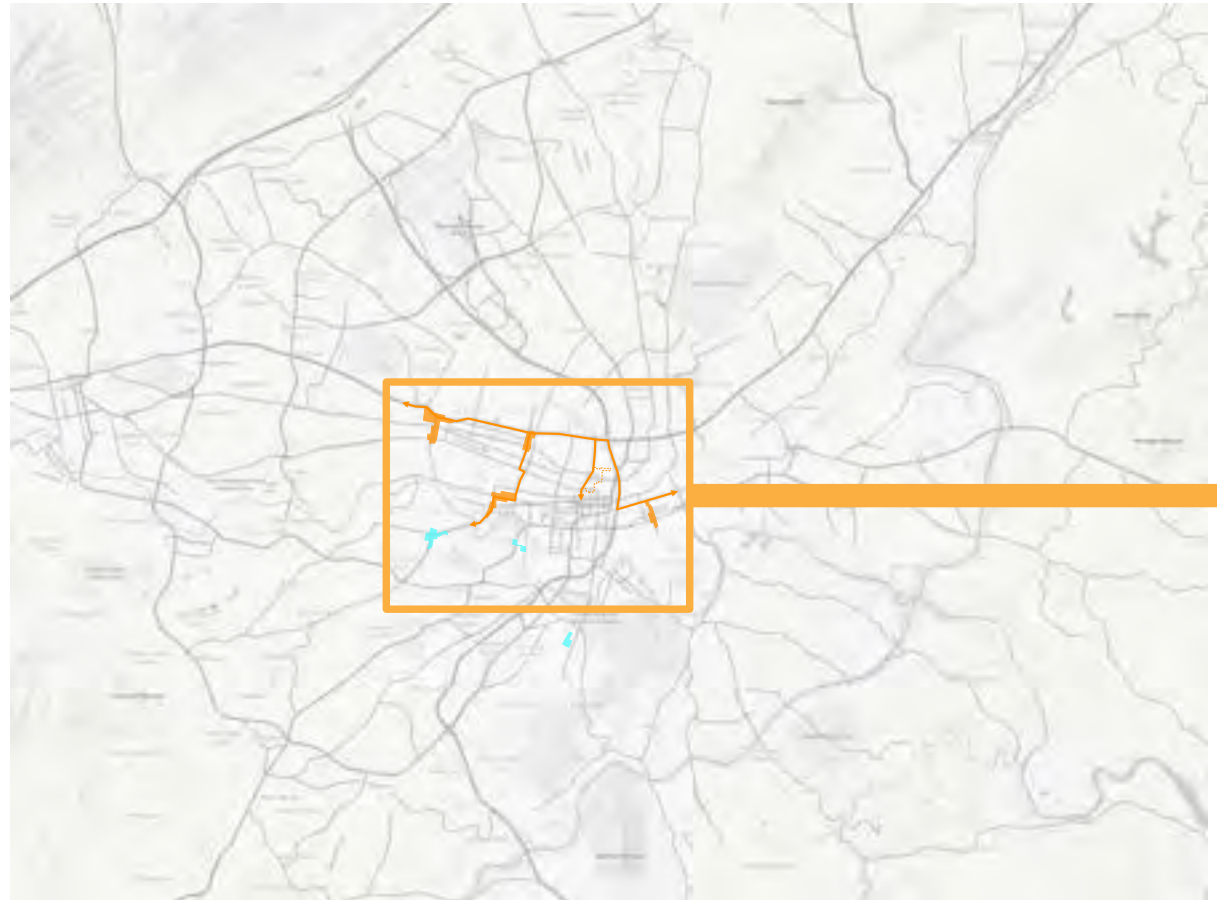
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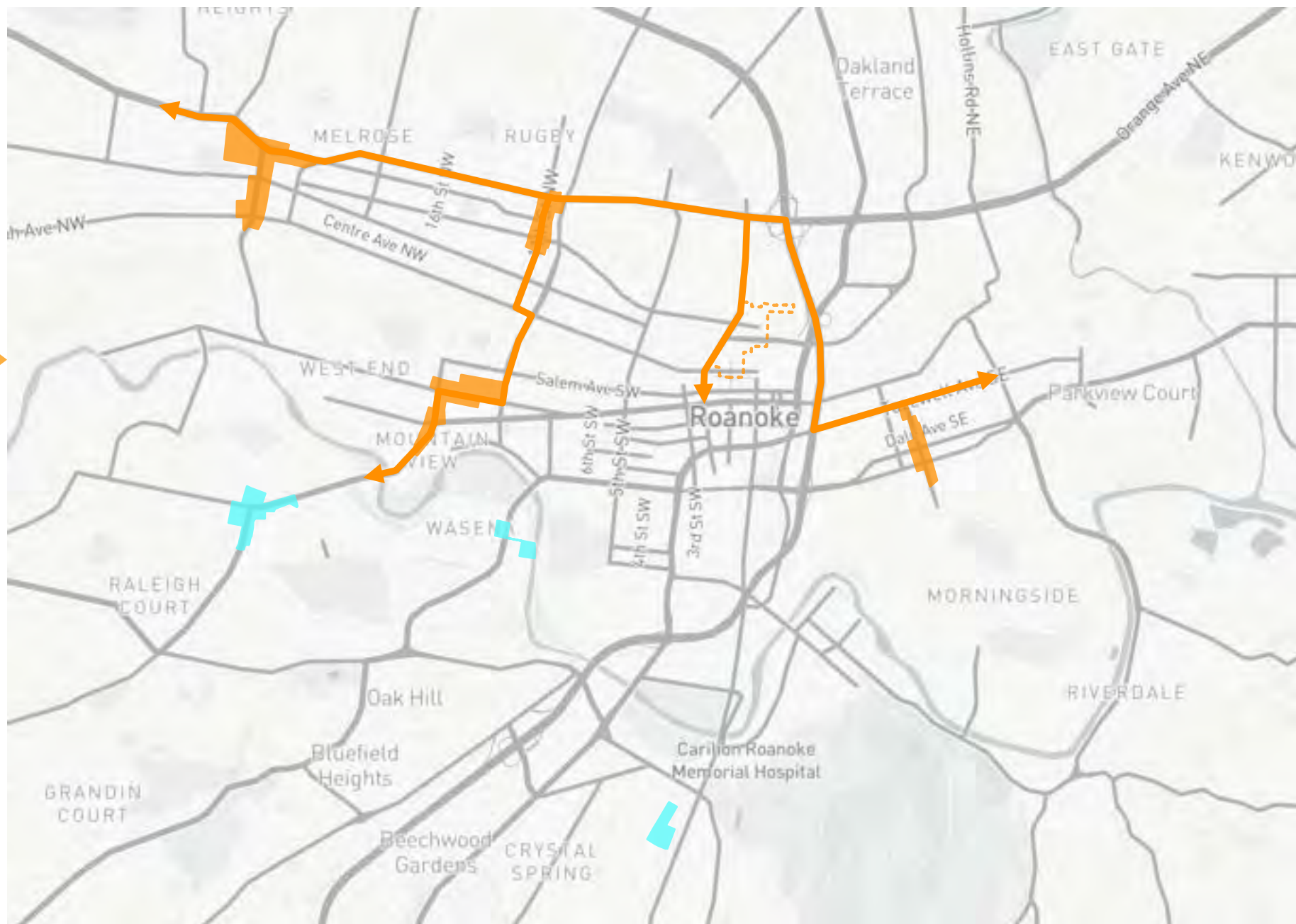
ROANOKE: The Project

PROJECT OVERVIEW & OBJECTIVE

Downtown Economics LLC has been commissioned to explore ideas for Neighborhood Centers along a variety of corridors across the City that could enhance the physical environment, provide for and attract business and development opportunities to support area residents, and reinvigorate the neighborhood as well as the surrounding local economy. In this report, subject areas include:

- 11th STREET
- WEST END
- MELROSE AVENUE @ 24th STREET
- 9th STREET





ROANOKE: City Context

EXCERPT <https://planroanoke.org/urban-design/>

“The City of Roanoke is a vibrant urban center with strong neighborhoods set amongst the spectacular beauty of Virginia’s Blue Ridge. The overall goal of City Plan 2040 is to further transform Roanoke into an attractive place for people of all ages, backgrounds, and income levels to live, work, shop, and play. The form of development within our community impacts each citizen on a daily basis; therefore, how that development pattern shapes our community as it grows is important for everyone.

Good design is not optional. The quality of the physical environment – attractive buildings, parks, open space, and streets – has a direct impact on Roanoke’s economy, the sustainability of its neighborhoods, and the successful stewardship of its unique natural and cultural resources. The community expects a high level of excellence in building design, streetscapes, pedestrian amenities, preservation of special places, and enhancement of community distinctiveness.”

—Vision 2001-2020

City Plan 2040



City of Roanoke’s Comprehensive Plan
December 21, 2020

ROANOKE: Planning Foundation

Key Components

CITY PLAN 2040

Roanoke's comprehensive plan serves as a vision and guide for area growth and the foundation for City policy decisions and informs the direction of other component plans that support the comprehensive plan such as the plans for specific neighborhood and special topics (i.e., greenways, bikeways, libraries, arts and culture, and public art.)

VISION

According to the plan, in 2040 Roanoke will be:

- *A city that considers equity in each of its policies and provides opportunity for all, regardless of background.*
- *A city that ensures the health and safety of every community member.*
- *A city that understands its natural assets and prioritizes sustainable innovation.*
- *A city that interweaves design, services, and amenities to provide high livability.*
- *A city that collaborates with its neighbors to improve regional quality of life.*
- *A city that promotes sustainable growth through targeted development of industry, business, and workforce.*

See the complete City Plan 2040 here: <https://planroanoke.org/city-plan-2040/>

City Plan 2040 - BIG IDEAS

Through an intensive public engagement process, community working groups identified priorities, policies and actions in each of the City Plan 2040 theme areas. Eight big ideas emerged that aligned into three categories.

Category 1: Physical Development of Our Community

Represents the traditional content of a comprehensive plan, including how land is used and developed. Focus areas includes:

- Complete Neighborhoods
- Missing Middle Housing
- Neighborhood Centers

Of specific importance to this report, the City Plan 2040 notes:

*A complete neighborhood needs one or more **[neighborhood] centers** containing a mixture of higher density residential uses and neighborhood commercial uses. These centers serve as the focus of neighborhood activity and may vary in size and scale depending on the nature of uses and size of the surrounding neighborhood. Smaller **village centers** are often contained within a single block, while larger centers may have a mix of retail and office space and are anchored by larger institutions such as churches or schools.*

Category 2: Our Environment and Economy

The ability to grow an economy is closely tied to creating resiliency and maintaining a high quality of life. For Roanoke, this includes using local talent and resources while protecting the beautiful valley and surroundings. Focus areas include:

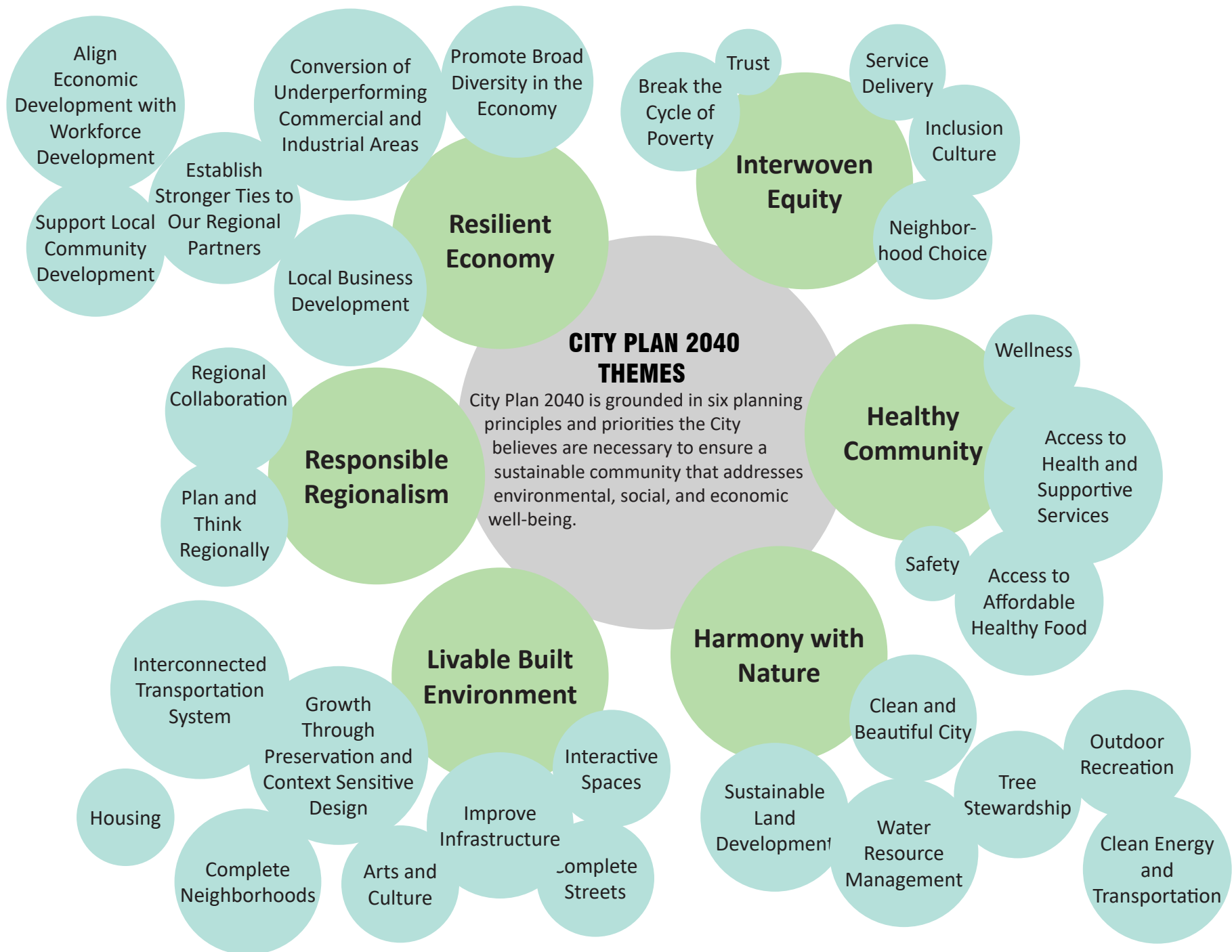
- Economic Development from Within
- Using Our Land Better
- Environmental Sustainability and Resiliency

Category 3: Our People

Reinforced by events of the last few months, Covid-19 and long overdue attention being drawn to systemic racism in our country, a renewed focus is being placed on the well-being of our community.

- Equity
- Community Health

Guiding Principles



Interwoven Equity

Vision: In 2040, Roanoke is both a diverse and an inclusive community with access and opportunities available to all including: education, housing, healthcare, employment, and quality of life. Roanoke recognizes how these opportunities are interconnected and how past actions created barriers that limited opportunity for underserved communities, particularly the African-American community, and eroded trust in institutions. To maintain a high level of Interwoven Equity and inclusion, the community is engaged continuously to identify and predict changes that could become opportunities or barriers and to adapt appropriately to those changes.

Healthy Community

In 2040, Roanoke engages a holistic and equitable approach to building and ensuring the physical and mental health of our community by empowering citizens with the knowledge and resources to achieve healthy living and to strive for accountability as individual members of a connected society.

Harmony with Nature

Vision: In 2040, the City of Roanoke will boast a clean, resilient environment in which everyone will live and prosper in harmony with nature through innovative, sustainable, and resilient practices that nurture community health, embrace recreational opportunities, protect our natural resources, address the local aspects of climate change, support ecosystem services, and foster

appreciation and understanding of the City's relationship with its natural surroundings.

Livable Built Environment

Vision: In 2040, Roanoke is a growing, historic cultural hub with: vibrant neighborhoods for all; housing that is safe, accessible, affordable, and varied; advanced technology to provide access opportunities for all, connected by an integrated multi-modal, user-friendly transportation system.

Responsible Regionalism

Vision: In 2040, the region will plan, act, and promote itself cohesively, with consideration of each community's political autonomy and social identity. Each community lends its unique assets and resources to developing the region's economy and quality of life. The region will work together to provide exceptional educational opportunities and public services at the regional level. The region will see more success because it began to compete economically as a unified entity.

Resilient Economy

Vision: In 2040, Roanoke's economy will continue its sustainable growth through the recruitment of diverse industries, revitalization of underperforming commercial spaces, support for small and local businesses, and its continued partnerships with strong regional and national players.

Our economy will be one that builds on a strong collaboration between private

businesses, non-profits, local government, and educational partners in order to develop a strong, skilled workforce across all ages, skill levels, and backgrounds that meets current and future employment needs and provides for good paying jobs. These critical stakeholders will value, support, and celebrate each other's successes.

Supplement to the comprehensive plan, additional criteria for community development can be found in the street design guidelines, urban design manual, architectural guidelines, neighborhood architectural standards, and the residential pattern book.

Link [here](https://www.roanokeva.gov/2020/Plans) (<https://www.roanokeva.gov/2020/Plans>)

Additional Links:

Urban Design <https://www.roanokeva.gov/1302/Urban-Design-Manual>

Street Design <https://www.roanokeva.gov/DocumentCenter/View/1500/Street-Design-Guidelines-Manual-PDF>

Public Arts <https://www.roanokeva.gov/DocumentCenter/View/1224/Roanoke-Public-Art-Plan>

Arts & Culture <https://www.roanokeva.gov/DocumentCenter/View/2622/Arts-and-Cultural-Plan>

Bikeway <https://www.roanokeva.gov/DocumentCenter/View/1384/Bikeway-Plan>

Greenway <https://www.roanokeva.gov/DocumentCenter/View/1225/Roanoke-Valley-Conceptual-Greenway-Plan>

Urban Forestry <http://www.playroanoke.com/wp-content/uploads/2017/02/Urban-Forestry-Plan.pdf>

Highlights of Planning Concepts that informed City Plan 2040

Like *City Plan 2040*, Roanoke's previous comprehensive plan *Vision 2001-2020* also contained numerous *Neighborhood Plans* that reflected the collaborative planning efforts of city staff and community members. The following plans relate to this report's subject areas:

The *Vision 2001-2020 Comprehensive Plan* advocates development of **village centers** as an economic development strategy to strengthen neighborhoods at a centralized core to keep from fray and fragmentation. Many of Roanoke's traditional neighborhoods developed originally as villages - - self-contained centers that provided opportunities for people to live, work, shop, play, and interact in a local setting. Village centers offer amenities typically not found in suburban, or rural, areas such as convenient access to schools, local services, and jobs.

Several village centers have been created and/or revitalized over the last decade based on strategic imperatives; and are evidence of what can be catalyzed for a community's experience and its economy. Today's centers - - GRANDIN VILLAGE, CRYSTAL SPRING & WASENA - - are characterized by a mixture of densities and uses, including neighborhood oriented retail, office, residential as well as recreational and entertainment venues. Buildings are typically set close to the street and often adjoin each other. On-street parking is common and off-street parking is located to the side or rear of principal buildings allowing pedestrian flow. As described in various design guidelines:

Neighborhood scaled commercial and mixed-use centers are often found at intersections near busier streets and are situated so they can be accessed by most of the neighborhood by a 5-10 minute walk. Buildings often form a denser pattern with zero setbacks and higher lot coverage. The scale of buildings complements the density and housing that surrounds them.

CENTER Design principles:

- Proposed development (infill development, alterations, renovations, and additions) should create or enhance a distinctive character that relates well to the surrounding community through setbacks, scale, massing, primary entrances facing streets, ample window openings, durable materials, and architectural detailing.
 - Residential buildings should have consistent setbacks from the street.
 - Two-family and multifamily buildings should be of similar scale to the residential housing that surrounds it; while such housing near the neighborhood centers and corridors may be larger in scale.
 - Institutional buildings may be on larger parcels and setback further from the streets with civic spaces connecting such buildings to the street.
 - Neighborhood center buildings should be set close to the street and have street facing entrances and windows that enhance pedestrian activity.
 - Corridor improvements within urban neighborhoods should focus on streetscape enhancements with greater pedestrian, bicycle, and mass transit amenities.
 - Existing industrial centers should introduce a mixture of complementary residential and commercial uses, maximize site development with buildings developed along street frontage, address the street with entrances, etc. All loading and outdoor activity should be subordinate to the principal building and attractively screened. Parking and loading areas should be attractively landscaped.
- Outdoor storage and activity should be attractively shielded from street and surrounding properties
- Avoid excessive lighting
- Vehicular entrances to property should be defined
- Parking and loading areas should have trees along street frontages.
- Well-designed historic buildings should be preserved and should be used to inform new development.
- Neighborhood schools and commercial nodes should be preserved.
- All streets should have sidewalks and should be lined with trees between the sidewalk and the street. On-street parking should be encouraged rather than having each lot contain its own parking. Where off-street parking is provided, it should be located to the rear of the lot; driveways and garages should be located to the side or rear of buildings.
- Streetscapes in neighborhood centers should promote pedestrian activity through broad sidewalks and public gathering spaces.
- Streetscapes around and within commercial and mixed-use centers should have shared parking and reduced curb cuts.

Link: <https://www.roanokeva.gov/DocumentCenter/View/1500/Street-Design-Guidelines-Manual-PDF>
AND <https://planroanoke.org/urban-design/>

NEIGHBORHOOD BLUEPRINT

The following pages provide an overview of the design elements present in successful neighborhood centers, followed by a brief analysis of three mature neighborhood centers:

- Wasena
- Crystal Spring
- Grandin Village

The design elements pictured in the immediate following pages are all examples from these three neighborhood centers.

PUBLIC ART

MURALS



BRIGHT COLORS



PAINTED STORM DRAINS



ACTIVE SIDEWALKS



SIDEWALK SEATING



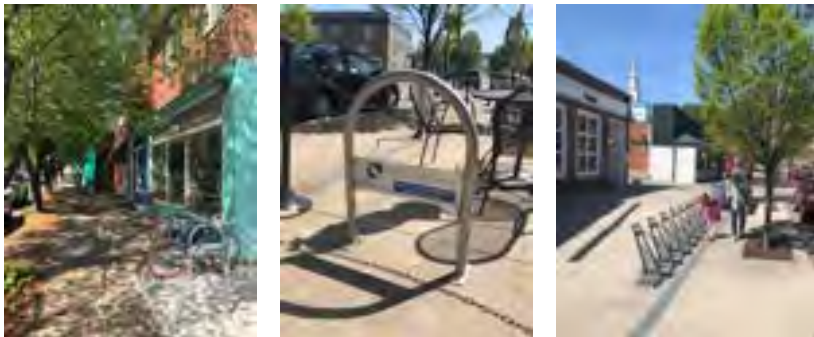
SIGNAGE



MULTI-MODAL TRANSPORTATION

PEDESTRIAN AMENITIES

BICYCLE INFRASTRUCTURE



TRASH RECEPTACLES



BENCHES / SEATING



AWNINGS

SCOOTERS/MICROMOBILITY



GREEN INFRASTRUCTURE



STREET TREES



LANDSCAPING



GREEN SPACES



Wasena Park at sunset, image by Jimmy Moore via City of Roanoke, VA



WASENA

The historic Wasena neighborhood was one of Roanoke's early suburbs, and has maintained virtually the same character as when it was developed in the 1920s. Since its inception the neighborhood has been one of the most stable communities in the City. Wasena is located southwest of downtown and is bounded by the Roanoke River to the north and east, Greater Raleigh Court to the west, and Brandon Avenue to the south. [Source: Neighborhood Plan]

'Wasena' in a Native American language translates as "beautiful view."

Wasena is a hidden treasure with a number of elements that make it stand out as a special place. First, its location close to the Greenway and the Roanoke River, as well as a 20-minute walk from downtown and area attractions like Black Dog Salvage. Second, its anchor shops like the coffee shop, outdoor store and boutique experiences. Third, introduction of design elements like bright energetic colors, street trees of mature canopy, variety of places to sit and take in surroundings, wide walkable brick sidewalks, the unique and whimsical public art, and easy access to a variety of parking. There is

an increasingly diverse mix of people of different backgrounds and age groups that own and rent homes in the community which attracts a variety of merchants and consumers to the area.

In 2011, the City rezoned land near the Roanoke River in Wasena from light industrial to an urban flex district, which would allow retail stores, restaurants, apartments and small-scale industrial uses. Meanwhile, the neighborhood was granted historic status that allowed the use of historic tax credits for renovation projects. This led to the redevelopment of a former ice house into a mixed use building and the renovation of the former transportation



BENCHES

**BRIGHT PAINT
COLORS**

BICYCLE PARKING

museum into a restaurant along the newly established Roanoke River Greenway. As these developments brought in new residents and visitors, the neighborhood association focused on small improvement projects along Main Street, all of which eventually resulted in the revitalization of previously vacant commercial properties on Main Street to help grow the Wasena neighborhood center.



AWNINGS

STREET TREES

SIGNAGE



CRYSTAL SPRING

South Roanoke emerged in the area of Crystal Spring in the late 1800's as an outpost of the City and developed into a traditional neighborhood in the early 1900's, 'SoRo' as it has been dubbed, has grown and continues to expand. New generations of residents have moved in, but the neighborhood's historic institutions remain, providing continuity in the overall sense of place and high quality of life. South Roanoke derives its obvious title from its location south of Downtown Roanoke. Tucked along Mill Mountain to its east, the neighborhood is bounded by commercial

development along Franklin Road to the west, the crest of Yellow Mountain and the Southern Hills and Garden City neighborhoods to the south, and Reserve Avenue to the north.
[Source: Neighborhood Plan]

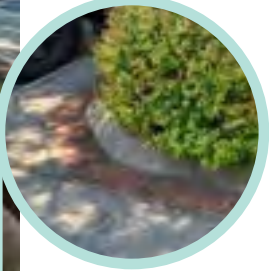
The Crystal Spring neighborhood village center anchors the South Roanoke neighborhood and has remained a vibrant commercial area since its development in the 1920s. Surrounding the neighborhood center is a mixture of dwelling types including single-family, two-family and multifamily. The South Roanoke neighborhood is located near a cluster of medical services anchored by Carilion Roanoke Memorial

Hospital and is only blocks away from Downtown Roanoke. Located near so many employment opportunities and convenient to the center of the City, the neighborhood captures residents with incomes and levels of education higher than the rest of the City.

The Crystal Spring village center contains structures built between 1930 and 2000; and the current streetscape design was completed in 2007 to improve on-street angle parking, landscaped islands and sidewalks with new planters, trees, parklet benches, period lighting and creative street art on Crystal Spring Avenue. The improved streetscape enhanced the

pedestrian experience and added parking spaces to the village center. The village center boasts a mix of restaurants, cafes, offices, retail shops, boutique grocer & deli, post office and pharmacy along the western side of Crystal Spring Avenue. More intense commercial uses are found along adjacent streets including medical offices and financial institutions. Surrounding and facing the village center is a mixture of dwelling types including single-family, two-family and multifamily. Most homes were built in the 1910s and 1920s with the predominant styles being Foursquare, Bungalow and Victorian. All these elements make this an enchanting walkable village.

The added gem that lies between the “street walls” is a wedge-shaped landscaped median with a tree canopy-tented parklet a gazebo and seating area with a library drop box that later widens to accommodate the fire station and a community open space used for social gatherings and recreation.



What makes Grandin Village special?



GRANDIN VILLAGE

Nodes of commercial development along Grandin Road and Memorial Avenue have played an important role in the Raleigh Court neighborhood's history and add to the area's small town quality; Grandin Village is one of three significant contributors. Grandin Village traces its origin to 1906 with the establishment of the Virginia Heights Land Corporation and the development at the T-intersection at Grandin and Memorial in 1907. The majority of the structures in this streetcar community were constructed between 1917 and 1945; at which time Grandin Village emerged as a major retail and service area serving the residents of southwest Roanoke.

The Grandin Village business area is anchored by the Grandin Theatre and has a healthy mix of businesses that support, and are supported by,

the surrounding neighborhood. The area has grown but periodically struggled through the years. A 1996 study found that sixty percent of business in the village comes from the surrounding neighborhood. The village and neighborhood are dependent on each other for success. The Grandin Theatre has played a major role in the recent resurgence and success of the village center. With the revitalization of the theatre in the mid 1990s, it has become a major entertainment venue in the valley. A new streetscape in the village was built between 2003 and 2005 and transformed both the look and feel of the village. Improved pedestrian amenities such as crosswalks and traffic calming are included in the streetscape.

The enhanced sidewalks, street trees, large windows at street level, architectural details ,

*and a new streetscape combine to create a pleasant **pedestrian oriented** atmosphere. The area features neighborhood-oriented services such as a laundromat, gas station, restaurants, banks, ice cream shop, book store, professional offices including an architecture firm, and a local furniture store.*

Since then, the center has become a hub of new innovations and special projects. The Co-op grocery store and the LEAP Grandin Village Farmers Market provide the neighborhood with access to fresh food. The CoLab opened its doors in 2014 to provide co-working space for entrepreneurs, freelancers, small business owners and remote workers. Local Developer, Ed Walker, bought a small lot on Memorial Avenue near Grandin Village that he turned into a public playground, called Tarpley Park

after James Tarpley, a Korean War veteran that was known as the Angel of Grandin Village as he was a fixture in the village known for his kindness. The unique spirit of Grandin Village and the support of nearby residents and local businesses has helped maintain the vibrancy of the neighborhood.

With the revitalization of the Grandin Theatre in the mid 1990s, it has become a major entertainment venue in the valley. Stars, with names of restoration donors, line the sidewalk in front of the theatre in true Hollywood fashion. The streetscape, crosswalks and other traffic calming devices were constructed between 2003 and 2005, transforming both the look and feel of the village. Hot spots in Grandin Village include Grace's Pizza, Rockfish Grille, Happy Beli-Deli (Coop), and the Community Inn. Spikes, Pop's, and the Village Grill are located on Memorial Avenue. And, next to Reid's Fine Furnishings on the corner of Grandin and Westover Avenue is a book store named "Too Many Books." [Source: Neighborhood Plan]

BICYCLE PARKING



PAVING DETAIL



HISTORIC ARCHITECTURE

VARIETY OF HOUSING TYPES



Example of multi-family housing type, Grandin Village

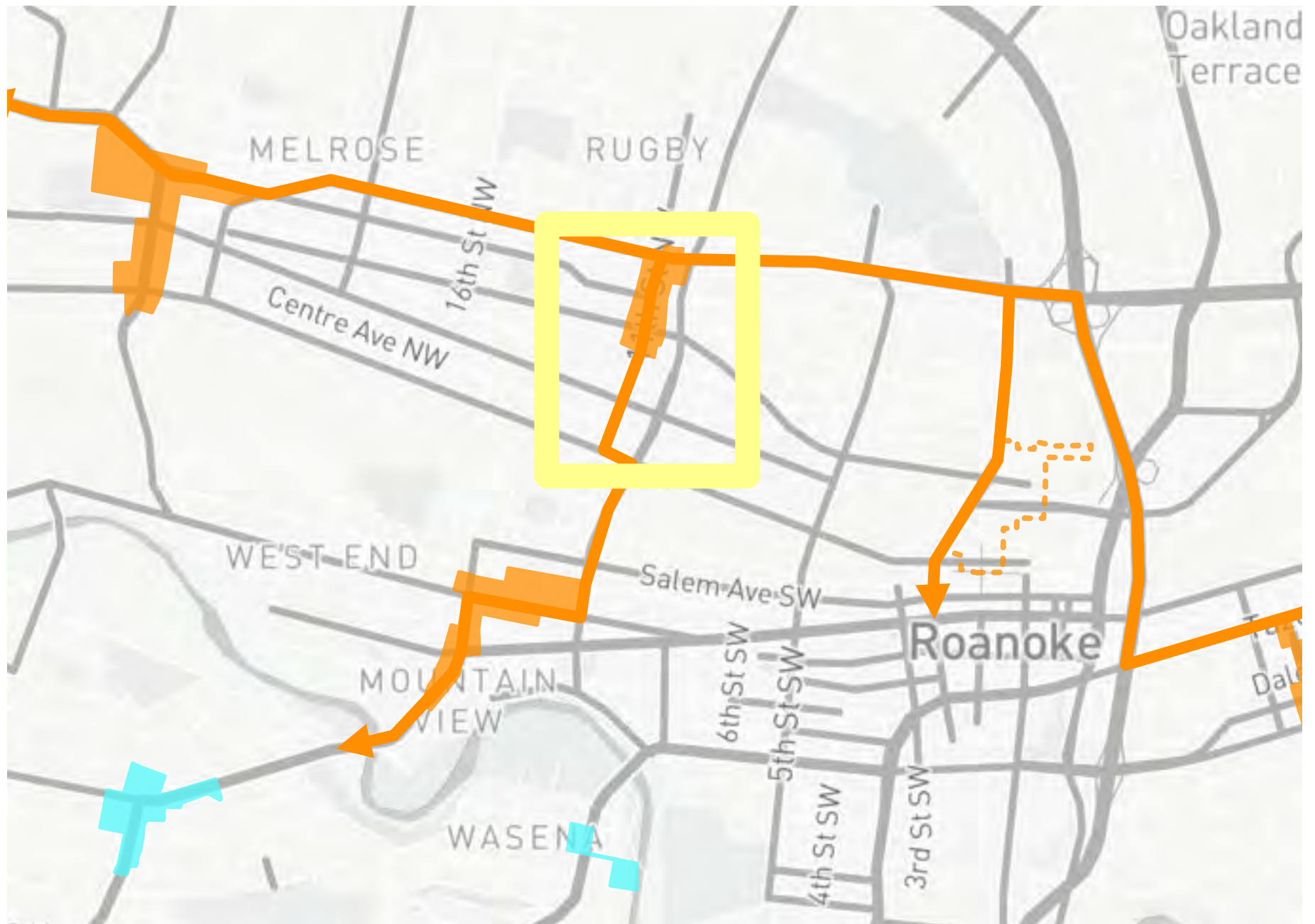
STREET TREES



NEIGHBORHOOD CENTERS: A STRATEGY

For decades, the City of Roanoke has promoted neighborhood centers as important nodes in their network of economic activity. For the purposes of this study, four areas were chosen from dozens of potential centers to serve as test beds for revitalization. Selection was based on a high potential for success, considering activity drivers like traffic, residential density, and amenities like parks. The existing fabric of buildings and infrastructure were also important factors. The most successful interventions can then be replicated as strategies for revitalization in other centers

- 11th Street NW
- West End
- Melrose @ 24th
- 9th Street SE



11th STREET NW



NEIGHBORHOOD PROFILE

Census Tract: 002500

Conservation & Rehab: Conservation

Enterprise Zone: Zone 1A

Opportunity Zone: N/A

Zoning: Commercial-Neighborhood (CN)

Historic District: N/A

Design Overlay: Neighborhood Design District (NDD)

Neighborhood Planning: Harrison and Gilmer

Neighborhood Organizations: NNIC (Harrison) and NNEO (Gilmer)

Parks & Greenways: N/A

Public Facilities: N/A



CODE ENFORCEMENT



ENTERPRISE ZONE



NEIGHBORHOOD ORGANIZATIONS



NEIGHBORHOOD PLANNING



CONSERVATION DISTRICTS



DESIGN OVERLAY



ZIP CODES



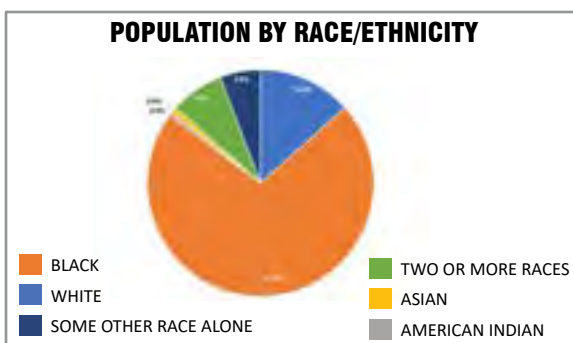
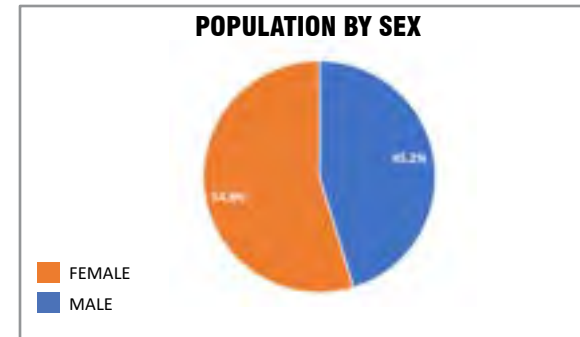
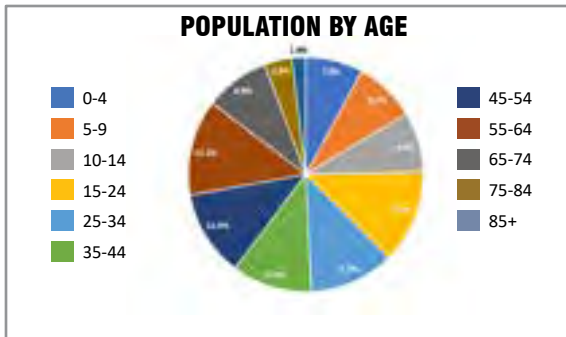
CODE ENFORCEMENT

BRIEF INTRODUCTION TO THE BROADER NEIGHBORHOOD

As reported in the US Census (2020) and ESRI (2022), the 11th Street NW area has a population of nearly 2700 persons with a median age of 36 years; and 1129 households with a median income of approximately \$22,500. Demographics indicate residents are predominantly black (72%) and female (55%), though it is unknown how these statistics are represented among the age groups or household composition. Over half the houses are renter-occupied (53.4%) while another 17% of the inventory sits vacant.

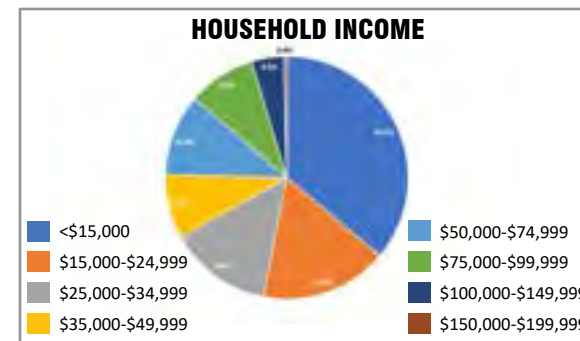
DEMOGRAPHICS

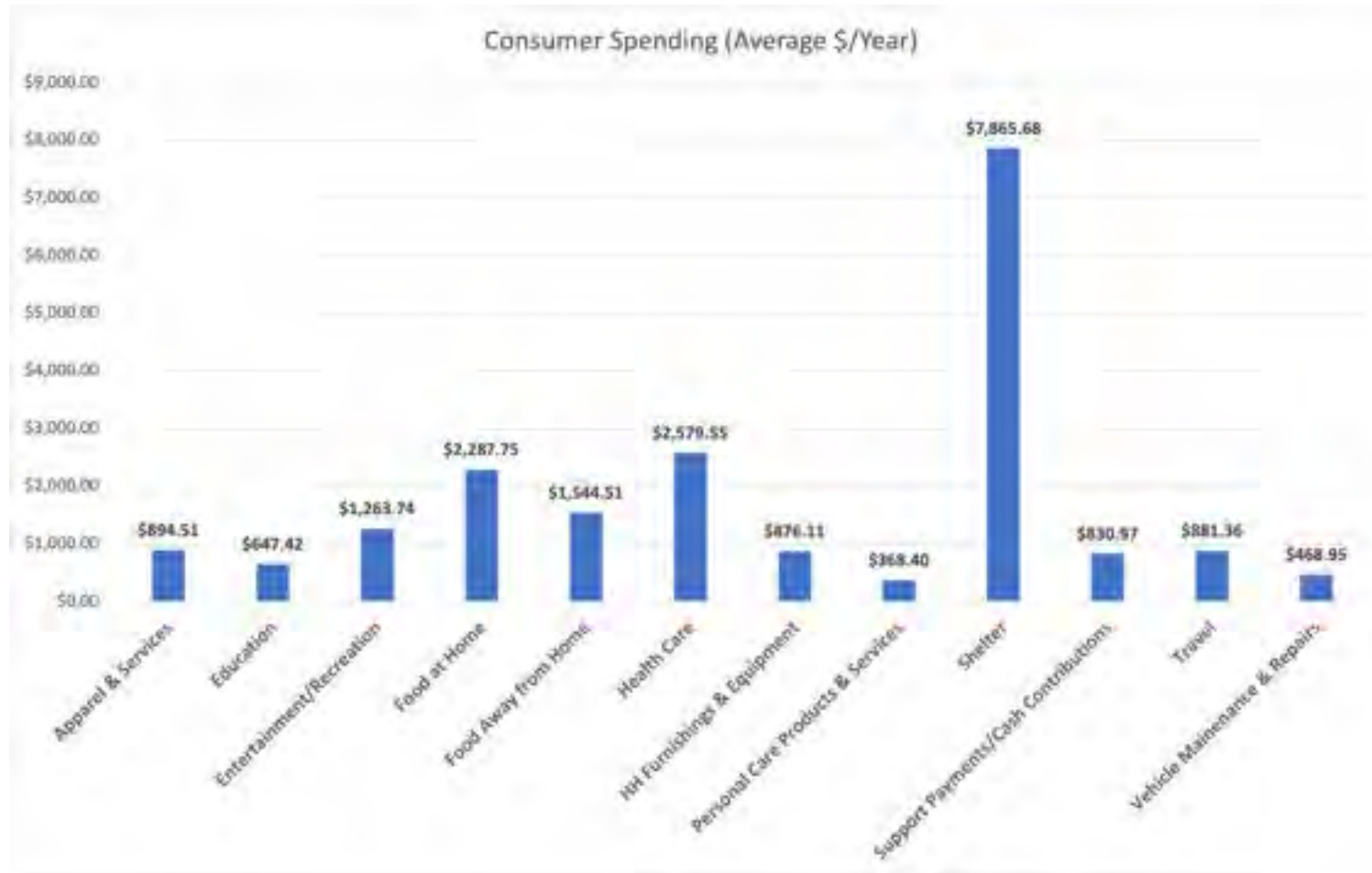
Total Population	2,653
Total Households	1,129
Average Household Size	2.41
Median Age	35.8
Median Household Income	\$22,460
Median Home Value	\$85,828



CURRENT BUSINESS OVERVIEW

Total Businesses in District	119
Total Employees in District	1,203
Service Businesses (51)	42.9%
Retail Trade Businesses (20)	16.8%
Construction Businesses (9)	7.6%
Wholesale Trade Businesses (11)	9.2%
Finance, Insurance, Real Estate Businesses (4)	3.4%
Manufacturing Businesses (9)	7.6%





Aside from the typical household and family expenses such as shelter, food and healthcare, consumer spending statistics indicate that area residents are relatively modest spenders. Consumers eat away from home almost as much as food at home, and do spend on entertainment separate from dining out.

LIFESTYLE ANALYSIS

According to ESRI's Tapestry segmentation model for lifestyle analyses, there are two lifestyle segments for the 11th Street, NW U.S. census tract. These two segments account for 100% of the population of the 11th Street census tract population:

Tapestry Segmentation	% of Census Tract Population	Percent of U.S. Household Population
Modest Income Homes	53.1%	1.2%
In Style	46.9%	0.9%

More detailed information regarding the Lifestyle segments for each model are included in Appendix A to this report.

Lifestyle Impressions Relevant to the 11th Street NW Neighborhood include:

Modest Income Homes (53.1%)

- Almost a quarter of adults aged 25 or more have no high school diploma
- Labor force participation is 50%
- Income is less than half of the US median income
- Consumers in this market consider traditional gender roles and religious faith very important
- This market lives for today, choosing to save only for a specific purpose
- Consumers favor TV as their media of choice and will purchase a product with a celebrity endorsement

City Commons (46.9%)

- Although some have college degrees, nearly a quarter have not graduated from high school
- Labor force participation is low at 53%
- Most households receive income from wages or salaries, with nearly one in four that receive contributions from Social Security (Index 287) and public assistance
- Consumers endeavor to keep up with the latest fashion trends
- Many families prefer the convenience of fast-food restaurants to cooking at home

ECONOMIC ASSESSMENT

This district segment has a great deal of potential but is woefully underutilized. The acquisition of property by the City or a developer will serve to provide substantial economic development (see Incentives section). Entrepreneurship development is already underway in the corridor. The Collective offers a variety of programming, and serves not only as coworking space, but as business incubation space, as well.

Business is scarce in the district beyond a convenience store and a small boutique. The acquisition of property for redevelopment towards a prosperous use is essential to the long-term economic development in the district. The Economic Development Authority should begin the process of land acquisition, to catalyze and incent such development. The acquisition of two parcels could serve to jumpstart development on 11th Street.

Gaps in the District: Identifying Sustainable Businesses & Needs

- The Economic Development Authority should acquire land that is underutilized or vacant.
- City grants should be provided to the current co-working space to encourage the development of additional microenterprise.
- Establish a statewide (and regional) developer attraction program through the Urban Land Institute and the Alliance for Incremental Development. Include incentives.
- Incentives (beyond existing incentives) for property repair and renovation.
- Increase code enforcement significantly in the corridor. There are numerous code violations within the district, thus making it less attractive for economic development.

PUBLIC COMMENT

Using a “top of mind” approach, 34 People were intercepted on 11th Street in this designated corridor and asked for their general impression of the community as it exists today.

Ranked by frequency of mention, the most often observations (some contracted into similar comments) include;

- Unattractive, junky, ugly and slum-like
- No place to shop
- Need a grocery store
- City ignores this area
- More parks type program
- Doesn’t look like other neighborhoods

SPECIFIC AREAS OF INTEREST for the NEIGHBORHOOD CENTER



11th Street NW between Orange and Shenandoah Avenues is approximately 7 blocks long. The corridor is dominated by nearly a dozen automobile servicing businesses, car lots and scrap metal yards. Laced among these spaces are a few houses (occupied and vacant) and several commercial buildings of varied size, condition and occupancy. This entire stretch of 11th Street is in Enterprise Zone 1A and a city designated Conservation Zone. There are no Opportunity Zones (not to be confused with Opportunity Areas) are designated in this district.

Zoned Commercial-Neighborhood (CN), the district is currently automobile-centric,

anchored with Advanced Auto and a Gas Station along Orange Avenue and 4 intermittent car part/metal yards running south culminating at a significant sized parking lot on the corner of Moorman Avenue at the rear of the funeral home that fronts on 10th Street. Thereafter, single-family detached dwellings line 11th Street between Fairfax and Loudon Avenues before turning into mostly commercial-industrial sites from Loudon to Shenandoah Avenue.

Ideas in this report for this area will focus primarily on the properties front-facing 11th Street along the 3-blocks between Orange and Fairfax Avenues. See Opportunity Areas 1, 2 and 3 herein.



VISION FOR THE NEIGHBORHOOD CENTER: LIV-WORK

Located off Orange Avenue and nestled in the housing areas of Harrison and Gilmer, this 3-block corridor of 11th Street is uniquely positioned for mixed use development already having both commercial and residential structures dotted throughout. As such, this corridor has the potential of being a neighborhood center catering to artists and entrepreneurs who could bring a hardy 24/7 “good foot traffic” presence to the at-present bleak streets and caged storefronts.

A catalytic mixed-use development would include ground level public spaces such as shops, offices, and cafes with sidewalk dining and displays. Upper levels could be a mix of office and residential. The housing component can be either apartments, given that the broader community is predominantly renter-occupied, or for unit ownership such as a cooperative or condominium. This new construction could reinvigorate the community as well as benefit existing community businesses along this corridor including Humble Hustle, A Cup of Hope coffee shop, a small grocery, and a hot dog stand. A range of development opportunities (new, renovation, conversion or adaptive reuse) in vacant buildings and on vacant parcels would be ideal for niche restaurants, retail, entertainment, office and housing. Suggestions include:

- Chain Pharmacy
- Small Independent Restaurants (up to three)
- Art studios
- Live/Work Spaces
- Service Businesses (law offices etc)
- Food Trucks/Small Restaurant
- Barber and Hair Salon
- Electronics
- Neighborhood Pub
- Cleaning Service
- Thrift Shop



Opportunity Area 1

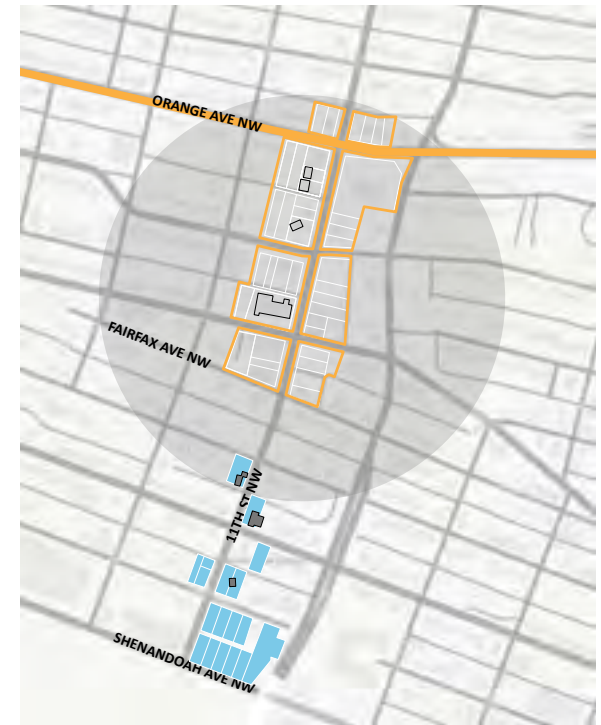
11th Street between Moorman and Fairfax Avenues

This block is somewhat the nucleus of this corridor. Revitalizing the atmospheric vigor here can stimulate improvements elsewhere among the surrounding blocks. The existing structures on the west side of 11th Street are loaded with character and prime for occupancy.

The vacated “Blue Ridge Housing Development Corporation” building on the southwest corner of 11th Street and Moorman Avenue can easily be adapted for another office upfit, retail store, large restaurant, or a community kitchen entrepreneurial space. Mixed density residential is also a possibility, but commercial is recommended given the location. Mid-block is a coffee shop nestled up against a vacant building at the northwest corner of 11th Street and Fairfax Avenue that exudes “niche foodie” diner./cafe As a block, these 3 properties could work in tandem, being operated / managed by businesses that could influence the other. For example, a Community Kitchen and culinary arts business center could manage, staff and prepare foods under the tutelage of seasoned professionals, respectively, thereby creating a practical teaching / job training income-producing operation.. Additional storefronts could include a boutique kitchen and linen shop, as well as a space to sell some of the community kitchen creations such as soups, breads and desserts for pick-up and carry out.



Directly across the street at the southeast corner of 11th Street and Moorman Avenue is a significantly sized impervious surface parking lot servicing the funeral home, and adjacent to a single-family detached dwelling and sizable side yard at the southeast corner of this block - - all of which belongs to a single owner. This is a perfect location for a “parklet.” Sections of the parking lot and side yard can be subdivided off and converted to a public green space. Working with the city, the space could even bump out into the Street to accentuate its present and be used as a traffic calming mechanism given its public attraction. Such a spatial feature would not only enhance the corridor, provide outdoor



seating opportunities for the adjacent restaurants/cafes, and generally benefit the community at large, but would also have positive impacts on the environment and storm water runoff. Akin to a “public square” this site supported by surrounding streets and lots can become host to pop-up Street Fairs with craft booths, food trucks and local musicians.

As this area revitalizes, it truly becomes the neighborhood center and ‘heart’ of this corridor. With or without other redevelopment, area walkability can greatly be enhanced with Improvements to streetscape (sidewalks, landscaping, lighting, graphics and furnishings) and crosswalks throughout the blocks from



Fairfax to Orange Avenues. Street Art (painted road) on 11th Street between Fairfax and Moorman Avenues visually and energetically links the shops and the parklet adds another layer of flair and connectivity at this hub. Suggestions include:

Public Realm & Placemaking

- Enhanced crosswalks on 11th Street at the intersections of Melrose/Madison, Moorman and Fairfax Avenues (regardless of other improvements) with corner bump outs to reduce the crossing opening as well as create on-street parking and parklets.
- Street Art (painted road) on 11th Street between intersections to visually connect the shops, restaurants, community and green spaces as a campus and to calm traffic signaling drivers this is a special area.
- Intersection Art (painted street) at 11th Street within the crosswalk grid.
- Sidewalk repairs with unified landscape and planter design on 11th Street from Orange to Fairfax Avenues.
- Sidewalk decorative lamp posts with options for banners and planters.

- Streetscape furnishings (artfully crafted and finished) including benches, trash receptacles, and creative bus stop booths where appropriate.
- Artwork including wall murals (like ones at the corner of 11th Street and Moorman Avenue), street lamp area identity banners and creatively painted traffic light control boxes as well as gutter and sewer covers.
- Parklet on the east side of 11th Street between Moorman and Fairfax Avenues.

Community Building

- Road art / painted crosswalks and intersections can be a community-created project
- Special city/neighborhood node marketing group to catalyze a pop-ups mobile commerce movement

Design & Development

- Facade enhancements including bold colors of paint and features such as signage, graphics and awnings. Wherever possible, create more and/or larger openings for windows. Where not possible, paint window murals or other attractive images.
- Public right-of-way curb extension and/or subdivision of parcels as needed for parklet.

Parcels Referenced:

East side:

- 2110201-2110202 paved lots, 2110203 side yard, 2110204 one dwelling unit (all same owner)

West side:

- 2110205, 2110206 and 2110208

Implementation Strategies for Area 1:

- Incent the relocation of the automobile and scrap metal yards to blocks along 11th Street between Fairfax and Shenandoah Avenues where others currently exist. This could reduce crime and get storefront owners to take protective metal mesh off the windows.
- Once vacated, these parcels can become the site for new green and mixed-use or LIV-WORK development as noted above.
- Incentivize leasing of vacant buildings:
- Parcel 2110108 - restaurant opportunity
- Parcel 2110105 - coworking office or retail / sporting / fitness center
- Subdivide parcels 2110201, 2110202 and 2110203 if needed to create a parklet / public square along 11th street, parking to remain adjacent to the funeral home lot (parcel 2110209) with reduced requirements. This would recalibrate the nucleus of this corridor to the blocks between Moorman and Fairfax Streets. The green space parklet could serve as additional outdoor dining and meeting areas, or as a place to pause for respite
- Enhance the streets with curb, gutter, trees, benches, signage/graphics, outdoor cafe dining.
- Economic Incentives & Programs
 - Refer to the Economics Section of this report for funding sources for:
 - Placemaking concepts
 - Facade enhancements
 - Enterprise Zone incentives
 - Conservation Zone incentives

Opportunity Area 2

11th Street between Melrose/Madison and Moorman Avenues

This block currently contains active businesses including automotive service providers, a specialized grocer, some clothing storefronts, and a coworking space with conferencing, entrepreneurial suites and a modest gym. The coworking space, at the northeast corner of 11th Street and Moorman Avenue, is the gem of this corridor, and the vision for it has seeded the community's revitalization effort and fueled the entrepreneurial and artistic spirit. Facade improvements to the remainder of the building would drastically improve the east side of 11th Street. The remaining parcels on that side to the southeast corner of 11th Street and Melrose/Madison Avenue are vacant and an excellent location for a new commercial-retail space; either a single user or single building with multiple tents.

On the opposite side of 11th Street this block, are several automobile serving sites and storage yards. The northern half block contains 3 single-story small box structures, and a larger warehouse type building and yard on the southern portion of the block oriented more towards Moorman Avenue than 11th Street. This corner lot business continues along Moorman Avenue west to 12th Street for half the block. The parcels on the west side of 11th

Street between Melrose and Moorman Avenues are a prime investment and development opportunity that could yield higher economic impact for the owners and the community if incentivized for better use such as a mixed use LIV-WORK environment with green rooftop features for tenants (retail or residential). Redevelopment on this block could also influence similar enhancements on both sides of Moorman Street between 11th and 12th Streets.

Parcels Referenced:

East side:

- 2121201, 2121203-212120 4 vacant lots, 2121205 one building (all same owner)
- 2121206 grocery (tenant)
- 2121207 coworking space (tenant) and

possibly 2121216 on Moorman

West side:

- 2222906
- 2222911 and 2222909
- +Moorman to 12th
- 2222907
- 2222101 -2222104

Opportunity Area 3

11th Street between Orange and Melrose/Madison Avenues

The west side of this block is visually, physically, and commercially similar to that of Opportunity Area 2. Additionally, there are a handful of single-family detached dwellings on both sides of this block that are withering amidst the commercial-industrial businesses to the west and south, and the two larger anchor entities to the north along Orange Avenue. The revitalization of the western face of 11th Street similar to the proposition for Opportunity Area 2 would substantially elevate the vitality of this community and its neighboring residents. At minimum, redevelop the site and building at the northwest corner of 11th Street and Madison Avenue that is oriented towards the intersection [Parcel 2222118].

Parcels Referenced:

2120801 Advanced Auto
2120807-09 and 2222116-2222117 Residences
2222119, 2222110 and 2222118 Commercial-Industrial Sites (automotive tenants)



Suggestions for Areas 2 & 3 include:

Public Realm & Placemaking

- Enhanced crosswalks on 11th Street at the intersections of Madison, Moorman and Fairfax Avenues (previously suggested in Opportunity Area 1)
- Sidewalk repairs with unified landscape and planter design on 11th Street from Orange to Fairfax Avenues.
- Sidewalk decorative lamp posts with options for banners and planters.
- Streetscape furnishings (artfully crafted and finished) including benches, trash receptacles, and creative bus stop booths where appropriate.
- Artwork including wall murals (like ones at the corner of 11th Street and Moorman Avenue), street lamp area identity banners and creatively painted traffic light control boxes as well as gutter and sewer covers.

Community Building

- Road art / painted crosswalks and intersections can be a community-created project

Design & Development

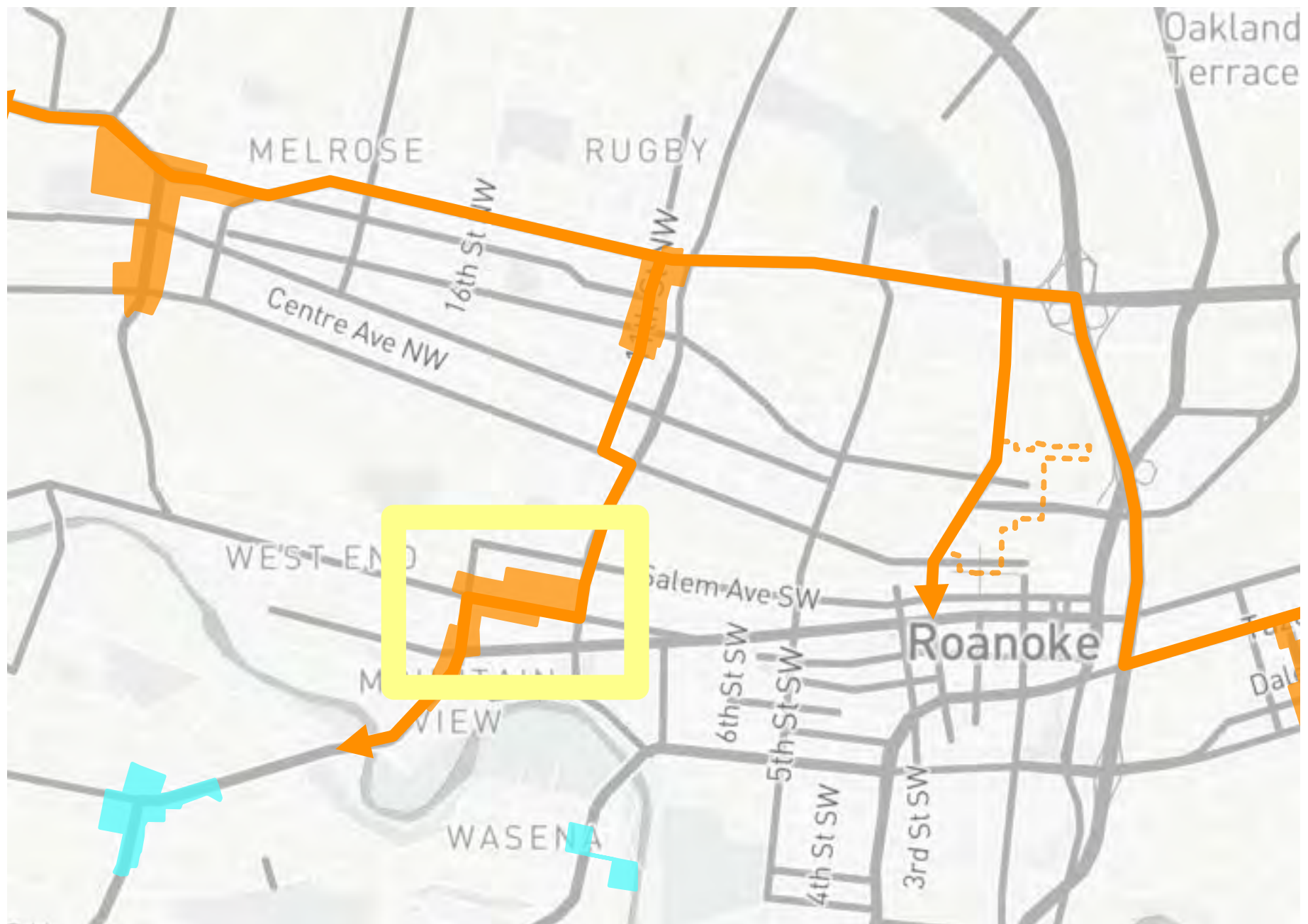
- Facade enhancements including bold colors of paint and features such as signage, graphics and awnings. Wherever possible, create more and/or larger openings for windows. Where not possible, paint window murals or other attractive images.

Implementation Strategies for Areas 2 & 3

- The suggested improvements for Opportunity Area 2 and 3 can be implemented in stages, by the city or land/business owners, as resources are available.
- To incent revitalization of this stretch of the corridor, implement public realm and placemaking aesthetic concepts as soon as

possible to attract both investors and providers and ultimately consumers.

- Enterprise Zone 1A monies are available on both sides of 11th Street for qualifying businesses and organizations to activate and expand their operations and facilities. Business owners are more likely to “seed” here if the area “looks” like they can grow and prosper in this location. There are funding opportunities for facade and other improvements as well.
- Reduce parking requirements (rezoning, special use, smart growth, etc) to accommodate green and mixed use redevelopment.
- Economic Incentives & Programs
 - Refer to the Economics Section of this report for funding sources for:
 - Placemaking concepts
 - Facade enhancements
 - Enterprise Zone incentives
 - Conservation Zone incentives





WEST END

NEIGHBORHOOD PROFILE

Census Tract: BG-1 001000, BG-2

Conservation & Rehab: Conservation

Enterprise Zone: Zone 1A along most of 13th Street between Patterson Avenue and the bridge

Opportunity Zone: N/A along 13th Street although there is a zone in the adjacent neighborhood.

Zoning Along 13th Street: Commercial-Neighborhood (CN), Commercial-General (CG), Mixed Use (MIX) and Mixed Use Conditional (MIXc), Residential Mixed Density (RM-2), Institutional (IN), Recreational and Open Space (ROS) among other zoning classifications surrounding 13th Street.

Historic District: H-2 Old Southwest

National Register: Old Southwest District

Design Overlay: Neighborhood Design District (NDD)

Neighborhood Planning: Mountain View and Hunt Park

Neighborhood Organizations: Mountain View and Hunt Park

Parks & Greenways: Mountain View Park, Roanoke River Greenway, Wasena Park

Public Facilities: N/A



ZONING



WATERSHED



NEIGHBORHOOD PLANNING



NEIGHBORHOOD ORGANIZATIONS



FLOOD PLAIN



CENSUS DISTRICTS



CENSUS DISTRICTS



HISTORIC DISTRICTS



ENTERPRISE ZONES



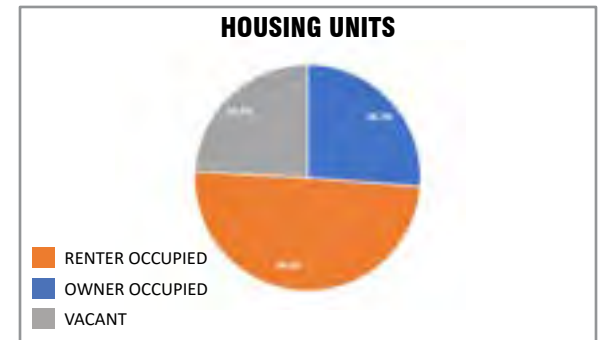
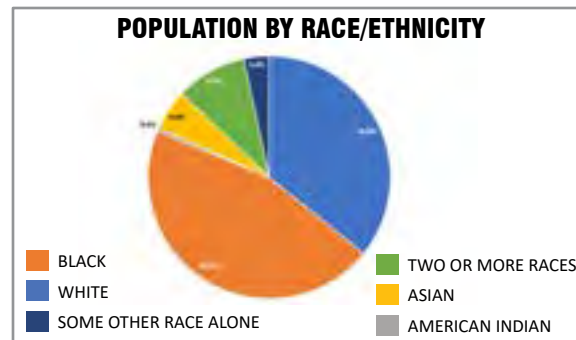
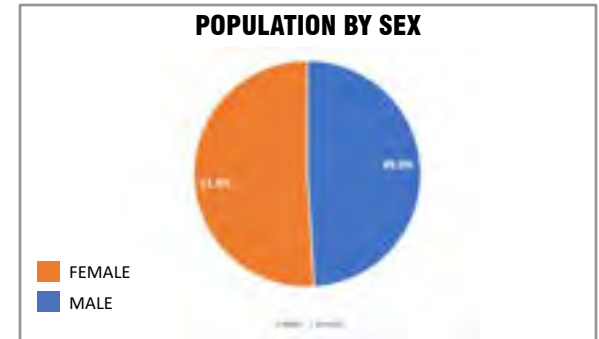
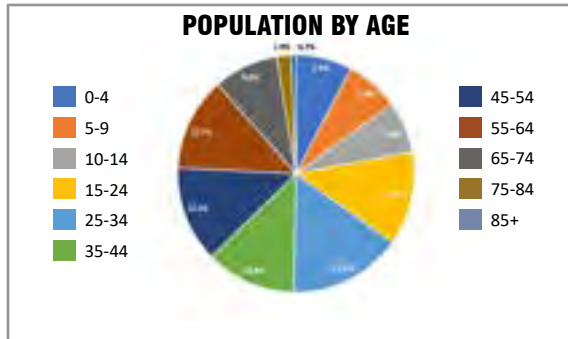
DESIGN OVERLAYS

BRIEF INTRODUCTION TO THE BROADER NEIGHBORHOOD

As reported in the US Census (2020) and ESRI (2022), the “West End” area has a population of over 2100 persons with a median age of 35 years; and 853 households with a median income of approximately \$25,800. Demographic reports indicate residents are predominantly black (45%) and white (36%), with a slighter higher female (51%) than male (49%) population; though it is unknown how these statistics are represented among the age groups or household composition. One half the houses are renter-occupied (49.6%) with the other half split between owner-occupied (26.2%) and vacant (24.1%).

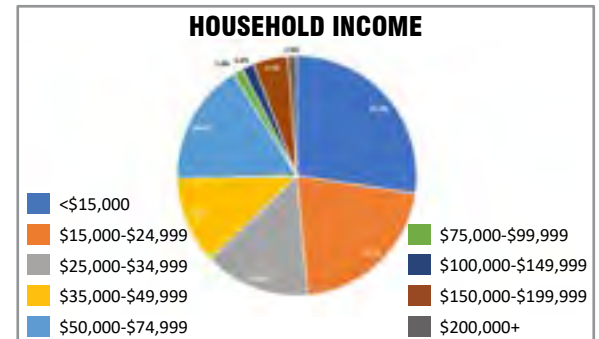
DEMOGRAPHICS

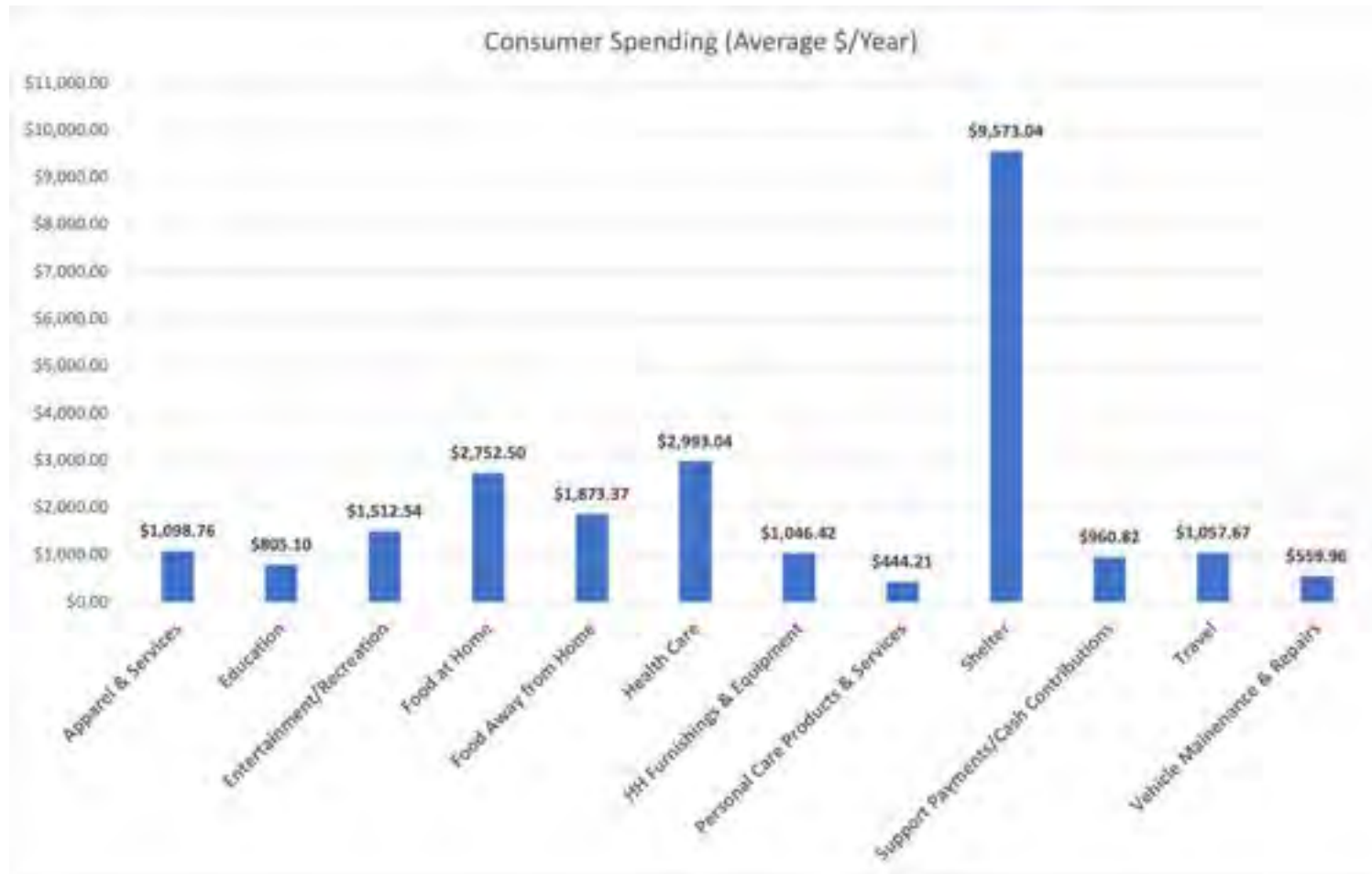
Total Population	2,123
Total Households	853
Average Household Size	2.45
Median Age	34.8
Median Household Income	\$25,758
Median Home Value	\$101,667



CURRENT BUSINESS OVERVIEW

Total Businesses in District	147
Total Employees in District	1,296
Service Businesses (61)	41.5%
Retail Trade Businesses (18)	12.2%
Construction Businesses (25)	17.0%
Wholesale Trade Businesses (17)	11.6%
Finance, Insurance, Real Estate Businesses (3)	2.0%
Manufacturing Businesses (15)	10.2%





Aside from the typical household and family expenses such as shelter, food and healthcare, consumer spending statistics indicate that area residents purchase food away from home almost as much as food at home (2:3) with expenditures for entertainment/recreation the next largest outlay. Apparel, home furnishings and travel spending is not far behind.

LIFESTYLE ANALYSIS

According to ESRI's Tapestry segmentation model for lifestyle analyses, there are the two lifestyle segments for the West End U.S. census tract. These two segments account for 100% of the population of the West End census tract population:

Tapestry Segmentation	% of Census Tract Population	Percent of U.S. Household Population
City Commons	56.5%	0.9%
Hometown Heritage	43.5%	1.2%

More detailed information regarding the Lifestyle segments for each model and target neighborhood are included in Appendix A to this report.

Lifestyle Impressions Relevant to the West End Neighborhood:

City Commons (56.5%)

- Although some have college degrees, nearly a quarter have not graduated from high school
- Labor force participation is low at 53%
- Most households receive income from wages or salaries, with nearly one in four that receive contributions from Social Security (Index 287) and public assistance
- Consumers endeavor to keep up with the latest fashion trends
- Many families prefer the convenience of fast-food restaurants to cooking at home

Hometown Heritage (43.5%)

- Education completed: 38% with a high school diploma only; 28% with some college or an associate's degree
- Higher rates of employment in manufacturing
- Labor force participation rate is lower at 57.1%
- Wages and salaries are the primary source of income for 70% of households, with contributions from Supplemental Security Income for 12% and public assistance for 7%
- Cost-conscious consumers who purchase sale items in bulk and buy generic over name brands
- They tend to save money for a specific purpose



ECONOMIC ASSESSMENT

The West End has received considerable attention over the years. An examination of the current economic climate for the West End, as well as previous studies, clearly indicates that a commercial district management organization would continue the revitalization of the commercial corridor.

There are several independent businesses dotting the West End and therefore we are recommending that the West End apply to become a Main Street program as administered by the Virginia Department of Housing and Community Development. While the City of Roanoke is part of the Main Street program generally, there is not a single neighborhood that has been identified as a Main Street district.

The Department of Housing and Community Development is actively seeking urban Main Street districts, and the West End is well positioned to become such a district. This would entail establishing a nonprofit entity with

a board of directors and a full time Executive Director. The four-point Main Street approach of Organization, Design, Economic Vitality and Promotion fits the overall economic landscape of the district well.

We also heard from some business owners that there was a need for additional working capital and leasehold improvement dollars beyond the existing façade revitalization program.

Gaps in the District: Identifying Sustainable Businesses & Needs

- Establish a Main Street Program. This will continue the current branding efforts.
- Market the neighborhood to the Alliance for Incremental Development, an organization of small developers seeking projects of the scale available in the West End.
- Ensure that working capital is provided to existing and planned businesses
- Establish an ongoing tour of the neighborhood for the Small Business Development Center so that graduates of the program are aware of potential locations

The City has used \$2.5 million in American Rescue Plan Act (ARPA) funds to support LEAP's effort to enhance and expand Roanoke's local food system. That project includes efforts to grow Roanoke's urban agriculture network of farms and gardens, enhancement of infrastructure for food based businesses and markets, expansion of the Harvest Bucks program to provide produce to eligible community members, and expansion of the Local Food Hub in Roanoke's West End. The LEAP Food Hub will provide a central location for farmers and food businesses throughout the City and the region to deliver food to LEAP, who will then aggregate all the food at the food hub, store and pack the food, and distribute the food throughout their various outlets including the Mobile Market, Farm Share, West End Farmer's Market, and retail store. The LEAP Food Hub is located at 1027 Patterson Ave SW, and the West End Farmer's Market takes place every Tuesday at 1210 Patterson Ave SW, behind Freedom First Credit Union.



Top: Looking south on 13th St
Right: Looking East on Patterson from 13th



Specific Areas of Interest: Opportunity Areas

SPECIFIC AREAS OF INTEREST for the NEIGHBORHOOD CENTER

“West End” is already somewhat of a branded area with identity banners along 13th Street NW from the intersection of Patterson Avenue running south past Cleveland Avenue, then continues on to the bridge by Black Dog Salvage. The corridor is dotted with a unique collection of businesses, residences, marts and restaurants, automotive service centers, churches, and the Mountain View Recreation Center. There are some vacant lots and others with metal yards that are ripe for redevelopment being more suitable for what this area is and can become.

Ideas in this report will focus primarily on the properties front-facing along the 3 to 4 blocks radiating from the intersection of 13th Street and Patterson Avenue zoned Commercial-Neighborhood (CN). These blocks include Patterson Avenue between 12th and 13th Streets (Opportunity Area 1), and 13th Street between Patterson and Campbell Avenues (Opportunity Area 2 & 3) as well as the associated intersections. Properties south of Patterson Avenue are part of the Southwest Historic District with the exception of the parcels west of 13th Street between Campbell

and Cleveland Avenues (Opportunity Area 4+). Interestingly in this subject area, the properties NOT included in the historic district ARE included in the Enterprise Zone 1A along with a few parcels on 13th Street that can claim both designations. No “Opportunity Zones” (not to be confused with Opportunity Areas) are designated in this area. All the parcels discussed herein are within the city Conservation Zone.

Opportunity Area 1

The West End Center for Youth anchors three corners of the intersection of 13th Street and Patterson Avenue; and has a prominent presence on Patterson Avenue between 12th and 13th Streets positioned alongside First Freedom Credit Union, Heavenly Foods and a handful of houses. There is a boarded up single-story brick building at the northeast corner of Patterson Avenue and 13th Street belonging to the Glorious Church of God. To the north of this structure is Sita Piercing addressed on 13th Street across from the S&S Grocery & Deli that occupies 2 large parcels on the northwest corner of this intersection fronting on Patterson Avenue. There is a bus stop and booth at the southwest corner adjacent to green and garden space belonging to the West End Center.

Opportunity Area 2 & 3

From Patterson Avenue looking south, the West End Center parcels comprise half of the block each side of 13th Street. The remaining half block to Chapman Avenue contains Sakina Food Mart with remnants of gas pump islands, and several storefronts of local businesses such as HLavish Salon Barbershop and Retail. A vacant building stands at the southwest corner of Chapman Avenue and 13th Street with West End United Methodist Church and several automobile operations in box bay structures occupying the remainder of the block south to Campbell Avenue.

Opportunity Area 4+

For the next several blocks along 13th Street from Campbell Avenue to Cleveland Avenue, there are several large automotive businesses and structures to the west along with Schaal Catering and Taco Rojas; and the City of Roanoke's Mountain View Recreation Center and Community Garden to the east. Beyond Cleveland Avenue to the Memorial Bridge are large single-family detached structures, some used as residences and others as businesses, and finally the destination attraction of the architectural salvage store Black Dog Salvage, Whiteside Designs and The Stone House at Black Dog Salvage.



VISION FOR THE NEIGHBORHOOD CENTER: CULTURAL COMMERCE LIFESTYLE & RECREATION

From the artfully painted stoplight electrical box and quirky bus stop booth at the intersection of Patterson Avenue and 13th Street south to Black Dog Salvage by the entrance to Memorial Bridge, this area of Roanoke has a “thrive vibe” and bustle about it. The physical diversity around this corridor ranges from understated buildings with whimsical iconic detailing to grander period homes and stately structures; metal yards to manicured yards and community gardens; and tiny eateries to pillar-porched churches.



Despite the numerous patches of non-public (like car yards) and vacant parcels, there is a cohesive atmosphere throughout this corridor. Physical connectivity is supported by continuous sidewalks and bicycle lanes. What’s needed now are Placemaking concepts and in-fill development to ‘complete the street’. Given the proximity to popular destinations like the Roanoke River, Black Dog Salvage center, and the Mountain View Recreation Center and Community Gardens, this Neighborhood Center could attract lifestyle goods- and services-providers to further expand opportunities for those individuals already consuming products

and experiences in the vicinity. Such additions might include:

- Local flair cafes and restaurants with outdoor, and possibly rooftop, dining
- Grab & Go grub and gear for outdoor adventures
- Artisan shops
- Garden and outdoor living shops
- Home decor
- Coffee & Ice Cream Parlors
- Wineries & Breweries
- Music venues
- Community Theatre (50-100 seats)
- Bed & Breakfast



This corridor has the potential of being a neighborhood center catering to local artists, merchants and entrepreneurs who could bring a hardy 24/7 “good foot traffic” to the long and winding street. Zoned commercial-neighborhood (CN), the district is currently more about businesses than consumers. There is little streetwall penetration; meaning that buildings fronting on Patterson Avenue and 13th Street have few windows and therefore no “storefront”.

Although the streets are lined with well-lit landscaped walks, there is little visual stimulation to intrigue the eye or encourage feet to stroll off wandering for hours in delight or curiosity of what treasure might be found a

block or two ahead. AND, this community has the potential to do just that with a few improvements and enticements.

Catalytic mixed-use development would include ground level public spaces such as shops, offices, and cafes with sidewalk dining and displays. Upper levels could be a mix of office and residential with green rooftop features for tenants (retail or residential). The housing component can be either apartments, given that the broader community is predominantly renter-occupied, or for unit ownership such as a cooperative or condominium.

Several empty buildings and vacant parcels are excellent development opportunities -- new,

renovation, conversion or adaptive reuse -- for niche restaurants, retail, entertainment, office and housing.

With minimal opportunities for infill development without demolishing existing structures or increasing density -- which is recommended in some locations (see Opportunity Areas herein) -- the implementation of select placemaking strategies would significantly enhance the vitality of this area whatever level of redevelopment is adapted now and in the future. Suggestions include:

Opportunity Area 1: Patterson Avenue between 12th & 13th Streets

Implement Placemaking Concepts

Improvements to existing facades and streetscapes will significantly enhance this area and create a “gateway” for the West End neighborhood center. The Patterson Avenue and 13th Street intersection is strategically poised between several neighborhoods; and as such has the potential to attract consumers and businesses from other areas of the city, as far reaching as this neighborhood center’s brand message will carry. To catalyze interest and impact, create a neighborhood node marketing group to organize offerings for weekend Farmers Market, Food Truck Vending and Pods, and Cultural Street Fairs featuring local foodies and musicians at this intersection and host on surrounding lots (paved or grassed). As events generate sales and providers curate a client following, mobile commerce can transition to brick- and-mortar commerce. AND, as the area gains appeal, parcels west of 13th Street and



east of 12th Street and all along 13th Street will become attractive opportunities for future development. Suggestions of where to begin, include:

Public Realm & Placemaking

- Enhanced crosswalks on Patterson Avenue at the intersections of 12th and 13th Streets with corner bump outs to reduce the crossing opening as well as create on-street parking and parklets.
- Street Art (painted road) on Patterson Avenue between intersections to visually connect the West End Center buildings as a campus and to signal drivers this is a special area.
- Intersection Art (painted street) at Patterson Avenue and 13th Street within the crosswalk grid.
- Sidewalk repairs with unified landscape design on Patterson Avenue from 12th to 13th Streets. Landscaping and planters to be compatible with work to occur throughout 13th Street south to the bridge.
- Sidewalk decorative lamp posts with options for banners and planters.
- Streetscape furnishings (artfully crafted and finished) including benches, trash receptacles, and creative bus stop booths where appropriate. There are 2+ in this vicinity.
- Artwork including wall murals, street lamp area identity banners (same or similar to banners on 13th Street), and creatively painted traffic light control boxes as well as gutter and sewer covers.
- Parklets on 3 corners of the intersection:
 - On the northwest at the S&S Grocery and Deli to anchor the corner more prominently since the building sits deep in the site.
 - On the southwest corner between the West End Center’s fence garden and the bus stop booth, and incorporate the booth.
 - On the southeast corner within the linked fence that contains the West End Center’s picnic area. Though a private space, it is in public view and enhancements would benefit the Center as well as the greater community.



Community Building

- Road art / painted crosswalks and intersections can be a community-created project
- Special city/neighborhood node marketing group to catalyze a mobile commerce movement
- Mountain View Community Garden to assist with community greening ideas

Design & Development

- Facade enhancements including bold colors of paint and features such as signage, graphics and awnings. Wherever possible, create more and/or larger openings for windows. Where not possible, paint window murals or other attractive images.
- Pocket Parks or infill development opportunities on underutilized and/or vacant parcel(s)

Parcels Referenced:

- 1212713-1212714 S&S Grocery & Deli (tenant)
- 1212812 Church of God (tenant)
- 1213407-1213408, 1213501-1213502, and 1212813-1212815 West End Center (tenant)
- 1212816 Single-family detached dwelling
- 1212817 Makers Mart & Heavenly Eats (tenant)

Implementation Strategies

- The suggested improvements for Opportunity Area 1 can be implemented in stages, by the city or land/business owners, as resources are available.
- To incent revitalization of this stretch of the corridor, implement public realm and placemaking aesthetic concepts as soon as possible to attract both investors and providers and ultimately consumers.

- Enterprise Zone 1A monies are available on both sides of Patterson Avenue for qualifying businesses and organizations to activate and expand their operations and facilities. Business owners are more likely to “seed” here if the area “looks” like they can grow and prosper in this location. There are funding opportunities for facade and other improvements as well.
- Economic Incentives & Programs
 - Refer to the Economics Section of this report for funding sources for:
 - Placemaking concepts
 - Facade enhancements
 - Enterprise Zone incentives
 - Conservation Zone incentives
 - Historic Tax Credits



Opportunity Area 2: 13th Street between Patterson & Chapman Avenues

Implement Placemaking Concepts

The first half of this block off Patterson Avenue is a continuation of the West End Center. The second half of the block towards Chapman Avenue is filled with a handful of commercial businesses to the east and a convenience mart to the west. There is also a two-story vacant building across from the mart on the southwest corner of the Chapman Avenue intersection that is appropriate to consider as part of the improvements for this Opportunity Area. Suggestions for this block include:

Public Realm & Placemaking

- Enhanced crosswalks at the intersection of 13th Street and Chapman Avenue. Intersection Art optional.
- Sidewalk repairs with unified landscape design throughout 13th Street south to Cleveland Avenue.



- Streetscape furnishings (artfully crafted and finished) including benches, trash receptacles, and creative bus stop booths where appropriate.
- Artwork including wall murals, street lamp area identity banners, and creatively painted traffic light control boxes as well as gutter and sewer covers. Utilize the existing street lamp hangers for identity banners and plantings.
- Parklets as places for pedestrian pause throughout the 7+ block corridor.

Community Building

- Road art / painted crosswalks and intersections can be a community-created project
- Mountain View Community Garden to assist with community greening ideas

Design & Development

- Facade enhancements including bold colors of paint and features such as signage, graphics and awnings. Wherever possible, create more and/or larger openings for windows. Where not possible, paint window murals or other attractive images.
- Conversion Design and Adaptive Reuse opportunities for all parcels other than West End Center.
- Pocket Parks or infill development opportunities on underutilized and/or vacant parcel(s)

Parcels Referenced

- 1213407-1213408, and 1213501 West End Center (tenant)
- 1213510 and 1213509 Commercial Building (multiple tenants)
- 1213416 Service Station Convenience Mart (tenant)
- 1220208 Vacant Building

Top row: Example Conversion / Adaptive Reuse Projects
Bottom row: Existing buildings in West End



Implementation Strategies

- The suggested improvements for Opportunity Area 2 can be implemented in stages, by the city or land/business owners, as resources are available.
- To incent revitalization of this stretch of the corridor, implement public realm and placemaking aesthetic concepts as soon as possible to attract both investors and providers and ultimately consumers.
- Enterprise Zone 1A monies are available throughout the 13th Street corridor for qualifying businesses to activate and expand their operations and facilities. Business owners are more likely to “seed” here if the area “looks” like they can grow and prosper in this location. There are funding opportunities for facade and other improvements as well.
- Economic Incentives & Programs
 - Refer to the Economics Section of this report for funding sources for:
 - Placemaking concepts
 - Facade enhancements
 - Enterprise Zone incentives
 - Conservation Zone incentives



Opportunity Area 3: 13th Street between Chapman & Campbell Avenues

Implement Design and Development Concepts

There is a vacant two-story building at the southwest corner of 13th Street and Chapman Avenue that, if redeveloped, would nicely complete the community experience at that intersection. Given existing conditions, the building's presence is more energetically connected to the intersection than to the streetwall elevation of the block on which it stands. The west side of 13th Street between the Avenues is predominantly populated with randomly spaced small single-story modest box buildings and garages sited on large paved lots that accommodate automobile businesses and repairs for the most part. The east side of 13th Street on this same block is the West End

Methodist Church. Future redevelopment of the west edge could support higher height and density given its juxtaposition to the grandeur scale of the church.

Public Realm & Placemaking

- Enhanced crosswalks at the 13th Street intersections at Chapman and Campbell Avenues. Intersection Art optional.
- Sidewalk repairs with unified landscape design throughout 13th Street south to Cleveland Avenue. Where any PUD exists, coordinate designs with public realm work.
- Streetscape furnishings (artfully crafted and finished) including benches, trash receptacles, and creative bus stop booths where appropriate.
- Artwork including wall murals, street lamp area identity banners, and creatively painted traffic light control boxes as well as

gutter and sewer covers. Utilize the existing street lamp hangers for identity banners and plantings.

- Pocket Parks and Greening Buffers on vacant, underutilized and/or unsightly properties.
- Parklets as places for pedestrian pause throughout the 7+ block corridor.

Community Building

- Road art / painted crosswalks and intersections can be a community-created project
- Mountain View Community Garden to assist with community greening ideas

Design & Development

- Facade enhancements including bold colors of paint and features such as signage, graphics and awnings. Wherever possible,



create more and/or larger openings for windows. Where not possible, paint window murals.

- Vacant Lot & Service Center Conversion potential
- LIV-WORK mixed use development with density
- Pocket Parks or infill development opportunities on underutilized and/or vacant parcel(s)

Parcels Referenced

- 1220208 (Vacant Building) thru 1201211 and 1220217 same Owner with various tenants
- 1220302 single-family detached dwelling surrounded by West End Methodist property

Implementation Strategies

- The suggested improvements for Opportunity Area 3 can be implemented in stages, by the city or land/business owners, as resources are available.
- To incent revitalization of this stretch of the corridor, implement public realm and placemaking aesthetic concepts as soon as possible to attract both investors and providers and ultimately consumers.
- Enterprise Zone 1A monies are available throughout this block of 13th Street for qualifying businesses to activate and expand their operations and facilities. Business owners are more likely to “seed” here if the area “looks” like they can grow and prosper in this location. There are funding opportunities for facade and other improvements as well.

- Incentivize the relocation of automobile-centric tenants and redevelopment of the site for a higher and better use to maximize economic impact to owners and the community. Consider mixed use commercial/residential development, with businesses such as chain dine-in/pick-up/delivery family type restaurants (not fast food), home goods store (like furnishings and garden, or local merchant version of Home Depot) and boutique stores.
- Economic Incentives & Programs
 - Refer to the Economics Section of this report for funding sources for:
 - Placemaking concepts
 - Facade enhancements
 - Enterprise Zone incentives
 - Conservation Zone incentives



**Opportunity Area 4+
13th Street between Campbell & Cleveland
Avenues ... and beyond.**

Status in this area between Avenues is similar to that of Opportunity Area 3. The west side of 13th Street are large lots of various automotive and industrial service centers with a few mart and eatery services. Redeveloped as a mixed use complex, these parcels could generate significant economic value. The eastern parcels predominantly belong to Mountain View.

Property between Cleveland Avenue and the railroad tracks are large single-family detached dwellings that are used as residences or business offices. Beyond that south to the bridge is the Black Dog Salvage complex.

Public Realm & Placemaking

- Enhanced crosswalks at the 13th Street intersections at Campbell and Cleveland Avenues. Intersection Art optional.
- Sidewalk repairs with unified landscape design throughout 13th Street south to Cleveland Avenue. Where any PUD exists, coordinate designs with public realm work.
- Streetscape furnishings (artfully crafted and finished) including benches, trash receptacles, and creative bus stop booths where appropriate.
- Artwork including wall murals, street lamp area identity banners, and creatively painted traffic light control boxes as well as gutter and sewer covers.
- Pocket Parks and Greening Buffers on vacant, underutilized and/or unsightly properties.
- Parklets as places for pedestrian pause throughout the 7+ block corridor.

Community Building

- Road art / painted crosswalks and intersections can be a community-created project

Design & Development

- Facade enhancements including bold colors of paint and features such as signage, graphics and awnings. Wherever possible, create more and/or larger openings for windows. Where not possible, paint window murals.
- Vacant Lot & Service Center Conversion potential
- Mixed use development with density
- Greenhouse & Nursery

Parcels Referenced (Campbell to Cleveland)

- 1220416, 1220419, 1220420, 1220421



- parcels on the west side of 13th
- 1220802 single-family detached dwelling surrounded by Mountain View property

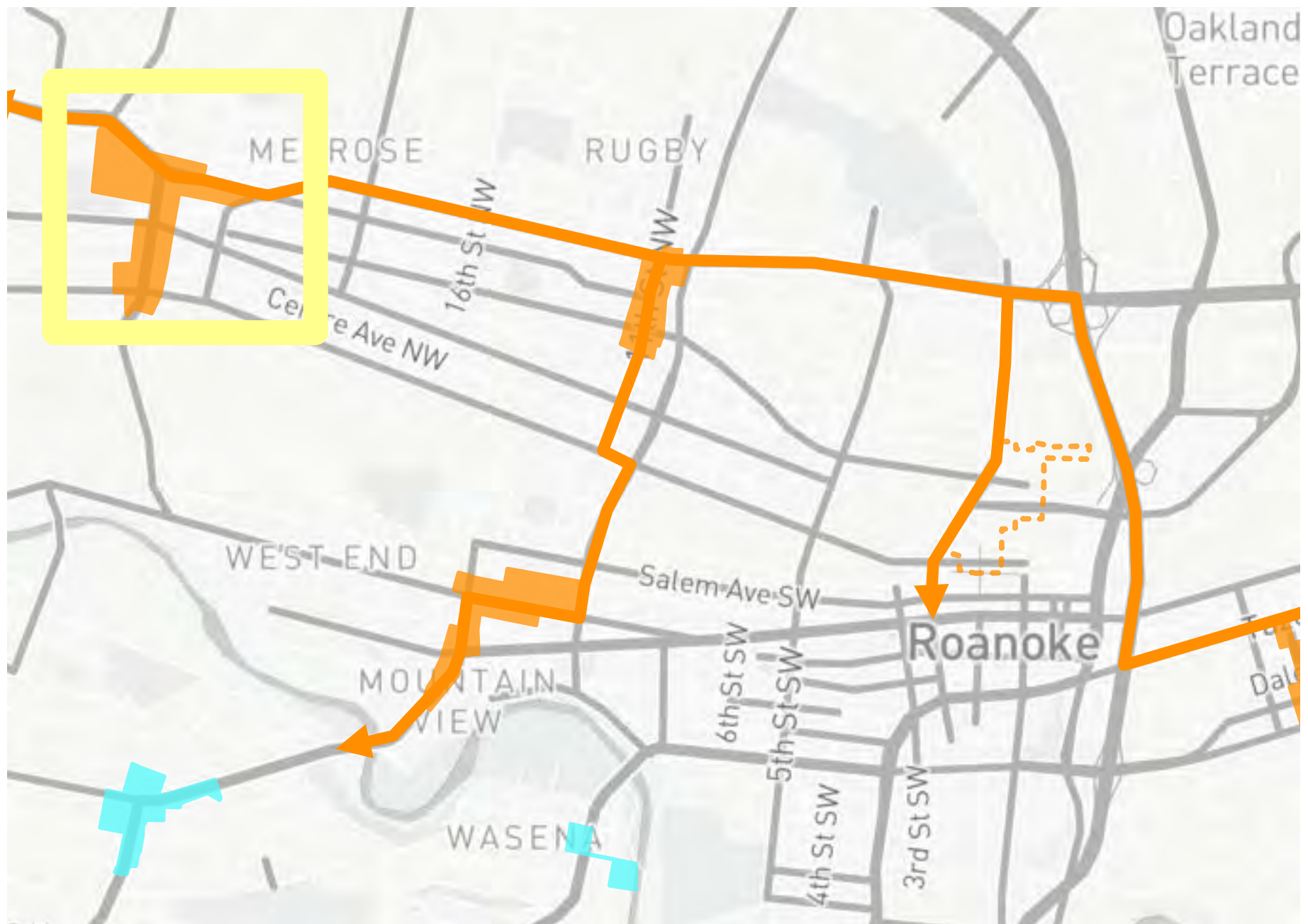
Implementation Strategies

- The suggested improvements for Opportunity Area 4+ can be implemented in stages, by the city or land/business owners, as resources are available.
- To incent revitalization of this stretch of the corridor, implement public realm and placemaking aesthetic concepts as soon as possible to attract both investors and providers and ultimately consumers.
- Enterprise Zone 1A monies are available all along 13th Street for qualifying businesses to activate and expand their operations and facilities. Business owners are more likely to “seed” here if the area “looks” like they can grow and prosper in this location. There

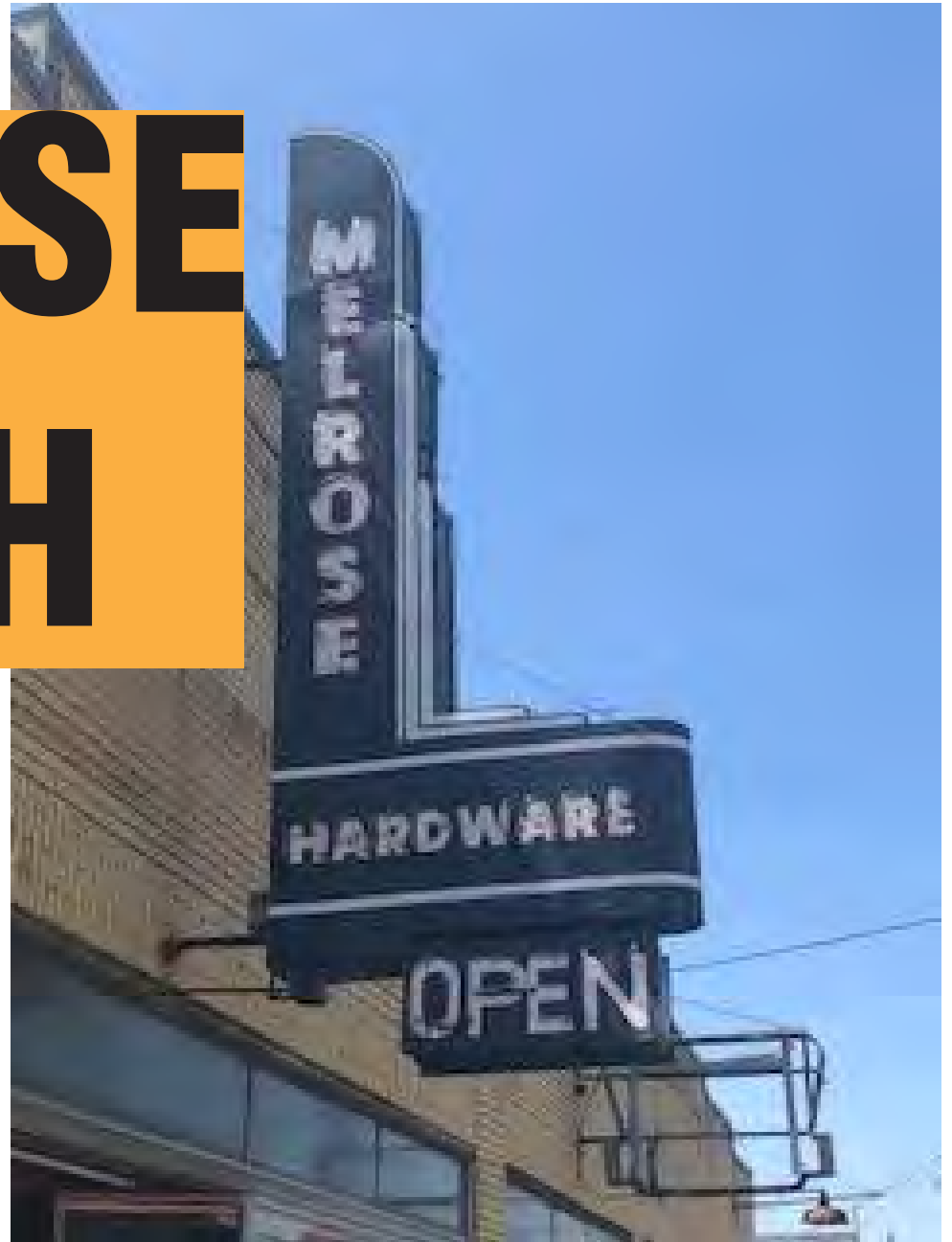
are funding opportunities for facade and other improvements as well.

- Incentivize the relocation of automobile-centric tenants and redevelopment of the site for a higher and better use to maximize economic impact to owners and the community. Consider mixed use commercial/residential development, with businesses such as chain dine-in/pick-up/delivery family type restaurants (not fast food), home goods store (like furnishings and garden, or local merchant version of Home Depot) and boutique stores.
- Economic Incentives & Programs
 - Refer to the Economics Section of this report for funding sources for:
 - Placemaking concepts
 - Facade enhancements
 - Enterprise Zone incentives
 - Conservation Zone incentives





MELROSE 24TH



NEIGHBORHOOD PROFILE

Census Tracts: BG-1 000100, BG-1 000900, BG-3 002400, BG-4 002500

Conservation & Rehab: Rehabilitation

Enterprise Zone: Zone 1A

Opportunity Zone: N/A

Zoning: Commercial-Neighborhood (CN), Residential Mixed Density (RM-1), Institutional (IN) and a couple of Planned Unit Developments (PUD) among other spot zonings

Historic District: N/A

Design Overlay: Neighborhood Design District (NDD)

Neighborhood Planning: Villa Heights, Shenandoah West, Melrose-Rugby, London-Melrose

Neighborhood Organizations: Melrose-Rugby, London-Melrose

Parks & Greenways: Horton Park, Staunton Park and Kennedy Park

Public Facilities: Melrose Branch Library



DESIGN OVERLAY



CENSUS TRACTS



REHABILITATION DISTRICTS



ENTERPRISE ZONE



NEIGHBORHOOD PLANNING



NEIGHBORHOOD ORGANIZATIONS



PARKS



FACILITIES



ELEMENTARY SCHOOLS



MIDDLE SCHOOLS



HIGH SCHOOLS

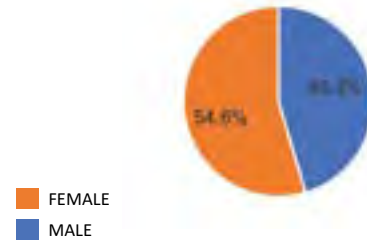
BRIEF INTRODUCTION TO THE BROADER NEIGHBORHOOD

As reported in the US Census (2020) and ESRI (2022), the Melrose Avenue NW area neighborhood has a population of nearly 16,000 persons with a median age of 37 years; although the population is pretty evenly distributed across the age brackets. There are approximately 6500 households of which the median income is just under \$27,600. Demographics indicate residents are predominantly black (70%) and female (55%); though it is unknown how these statistics are represented among the age groups or household composition. Over half the houses are renter-occupied (51%) while another 10% of the inventory sits vacant.

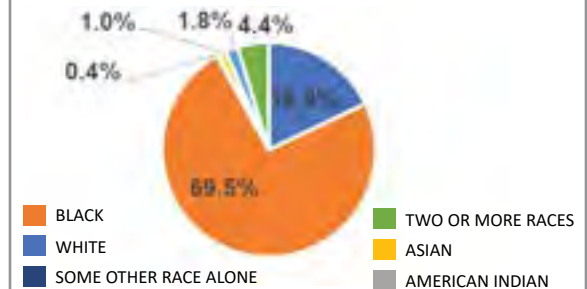
DEMOGRAPHICS

Total Population	15,973
Total Households	6,457
Average Household Size	2.45
Median Age	37.1
Median Household Income	\$27,596
Median Home Value	\$106,399

POPULATION BY SEX



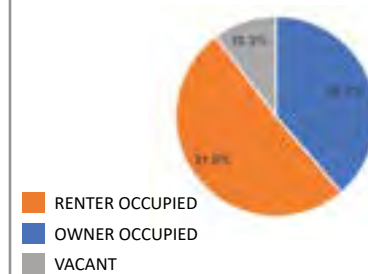
POPULATION BY RACE/ETHNICITY



POPULATION BY AGE



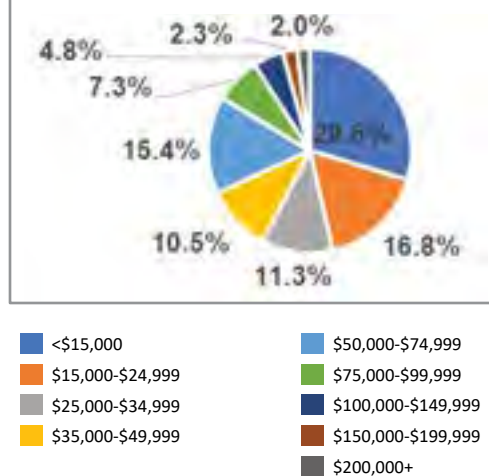
HOUSING UNITS

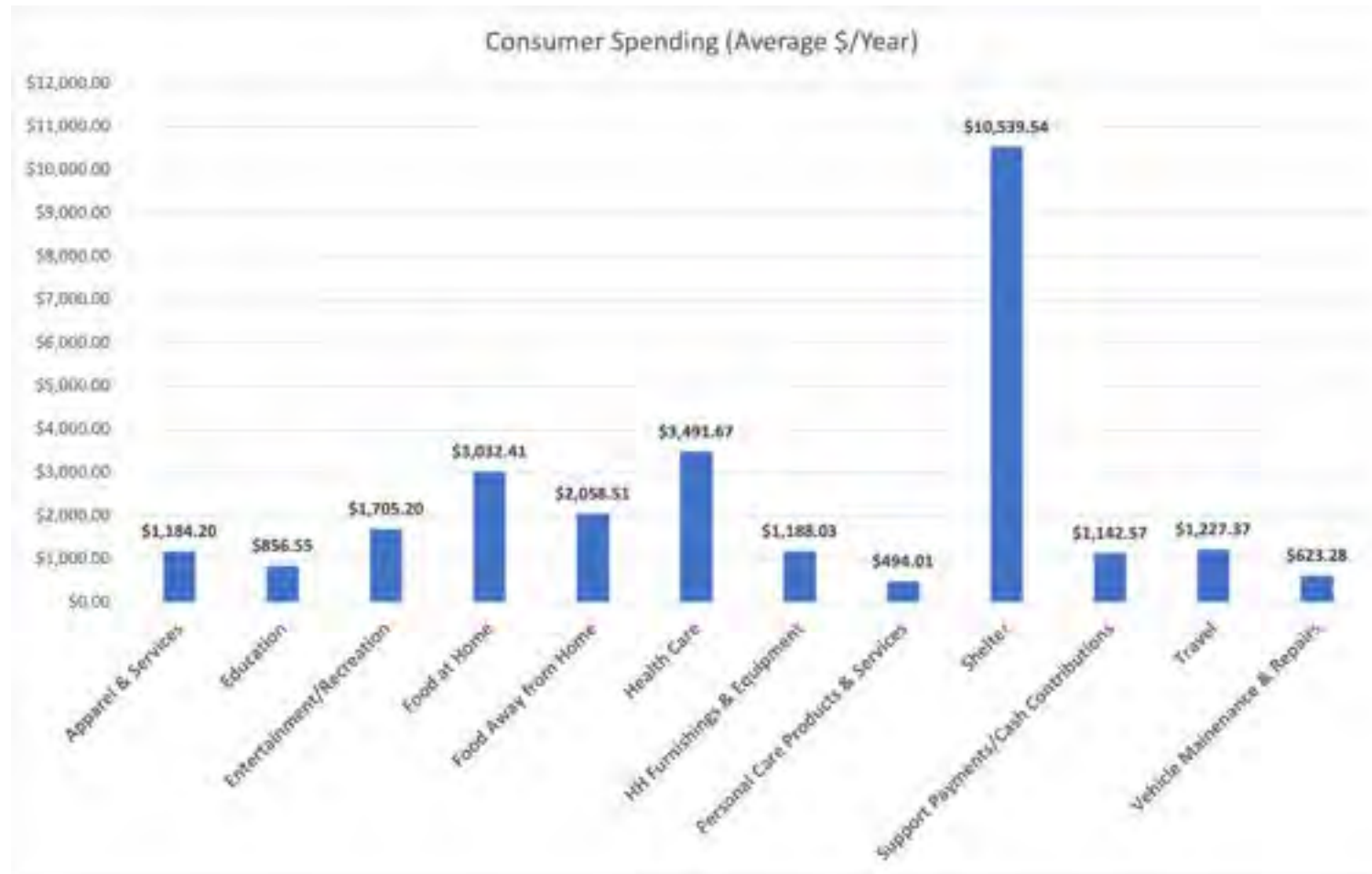


CURRENT BUSINESS OVERVIEW

Total Businesses in District	376
Total Employees in District	4,218
Service Businesses (161)	42.8%
Retail Trade Businesses (76)	20.2%
Construction Businesses (30)	8.0%
Wholesale Trade Businesses (29)	7.7%
Finance, Insurance, Real Estate Businesses (22)	5.9%
Manufacturing Businesses (15)	4.0%

HOUSEHOLD INCOME





Aside from the typical household and family expenses such as shelter, food and healthcare, consumer spending statistics indicate that area residents purchase food away from home almost as much as food at home; as well as higher spending on entertainment/recreation and travel over other care and services. Lifestyle analysis supports these findings for this area.

LIFESTYLE ANALYSIS

According to ESRI's Tapestry segmentation model for lifestyle analyses, there are the four lifestyle segments for the Melrose/Orange Avenues at 24th Street U.S. census tracts. These four segments account for 100% of the population of the Melrose/Orange Avenues at 24th Street census tract population as follows:

Tapestry Segmentation	% of Census Tract Population	Percent of U.S. Household Population
City Commons	37.9%	0.9%
Modest Income Homes	29.0%	1.2%
Family Foundations	27.6%	1.0%
Hometown Heritage	5.5%	1.2%

More detailed information regarding the Lifestyle segments for each model and target neighborhood are included in Appendix A to this report.

Lifestyle Impressions Relevant to the Melrose/Orange at 24th Street Neighborhood:

City Commons (37.9%)

- Although some have college degrees, nearly a quarter have not graduated from high school
- Labor force participation is low at 53%
- Most households receive income from wages or salaries, with nearly one in four that receive contributions from Social Security (Index 287) and public assistance
- Consumers endeavor to keep up with the latest fashion trends
- Many families prefer the convenience of fast-food restaurants to cooking at home

Modest Income Homes (29.0%)

- Almost a quarter of adults aged 25 or more have no high school diploma
- Labor force participation is 50%
- Income is less than half of the US median income
- Consumers in this market consider traditional gender roles and religious faith very important
- This market lives for today, choosing to save only for a specific purpose
- Consumers favor TV as their media of choice and will purchase a product with a celebrity endorsement

Family Foundations (27.6%):

- More than half have either attended college or obtained a degree; one-third have only finished high school
- Labor force participation rate is slightly lower at 58% as workers begin to retire
- Over one-third of households currently receive Social Security benefits; just under a quarter draw income from retirement accounts
- A strong focus is on religion and character
- Style and appearance are important

Hometown Heritage (5.5%)

- Education completed: 38% with a high school diploma only; 28% with some college or an associate's degree
- Higher rates of employment in manufacturing
- Labor force participation rate is lower at 57.1%
- Wages and salaries are the primary source of income for 70% of households, with contributions from Supplemental Security Income for 12% and public assistance for 7%
- Cost-conscious consumers who purchase sale items in bulk and buy generic over name brands
- They tend to save money for a specific purpose

ECONOMIC ASSESSMENT

This district is ripe for both startups and chain businesses. Microenterprises such as Island Jerk and Screaming Vegan speak to the district's ability to support small businesses. The Melrose Branch Public Library, the Goodwill Industries Center and the CVS Pharmacy serve as anchors in this district. With respect to sales, we rank chain pharmacies on a scale of 1 to 5, with 1 being diminishing sales and 5 being the highest sales. Our analysis places the CVS in the district as a 3, which bodes well for future chain development.

For years, the neighborhood has been seeking a grocery store. The grocery store attraction effort is laudable and addresses the major steps in grocery store development. For the last decade, it has not been economically feasible to support a grocery store. Given the sales volume at the CVS and the automobile traffic on Melrose and Orange Avenues, it now is clear that a grocery store is feasible for the district. A grocery store inevitably will serve as a catalyst

for additional business development, either a chain store or independent grocer. Our analysis indicates that a grocery store in the 12,000 to 15,000 square foot range is feasible within the district. We have reviewed thoroughly the Kevin R. Anderson Consulting Market Analysis and think that in the intervening years since its release, the market for a grocery store has become more robust. Moreover, stores such as Aldi are increasing their footprint in the region although not in our study area per se, the Roanoke Development and Housing Authority (RRHA) Office nearby on Melrose Avenue can serve as an economic development partner in the district. RRHA's experience in redevelopment can serve the district well as redevelopment opportunities are identified.

See "Grocery Store Project | Invest Health Market Analysis"

Link: https://planroanoke.org/wp-content/uploads/2018/11/NW-Food-Access-Initiative_FinalReport.pdf

Link: https://planroanoke.org/wp-content/uploads/2018/11/MOTA-Stakeholders_Ackley.pdf

Gaps in the District: Identifying Sustainable Businesses & Needs

- Establish a small Community Development Corporation to serve as a coordinating entity for the long-term revitalization of the district. This nonprofit corporation can be staffed on a part-time basis and headquartered in the Roanoke Redevelopment Housing Authority (RRHA) offices @ 2607 Salem Turnpike NW
- Seek ongoing input from the Roanoke Redevelopment Housing Authority (RRHA) on redevelopment opportunities for chain businesses. Given the sales at the CVS, the time is ripe to move quickly on bigger projects, especially a grocery store.
- Craft a developer attraction program with incentives and market data.
- Attract 2+ additional independent restaurants (*See VISION: Opportunity Areas 1 & 2*)
- Develop a promotional package for a 12-15,000 SF grocery store such as Aldi. (*See VISION: Opportunity Area 3*)



*Left: Existing Buildings
Right: Opportunity Areas*

SPECIFIC AREAS OF INTEREST for the NEIGHBORHOOD CENTERS

There are a couple of areas along Melrose Avenue between Salem Turnpike and Forest Park Boulevard that offer different levels of interest and economic opportunity, both immediately and overtime.

Opportunity Area 1: Melrose Avenue from the intersection of Salem Turnpike west to the intersection of 24th Street

West of Salem Turnpike and just before 24th Street, Melrose Avenue is both a residential and neighborhood commercial corridor with a steady stream of vehicular traffic throughout the day. Streetscape sidewalk and landscape improvements have recently been made on both sides of this section of Melrose Avenue. Along this 2.5-3 block segment of Melrose Avenue are houses to the north and small-scale single-story commercial buildings to the south. Businesses include a branch bank, a hardware

store, several clothing shops, some office space, a small restaurant, convenience store and Island Jerk food truck vending. The physical condition and occupancy of each of these spaces varies. The entire area around this segment of Melrose Avenue is designated as a city Rehabilitation Zone.

Opportunity Area 2: Melrose Avenue From the intersection of 24th Street to the intersection of Forest Park Boulevard

Just east of 24th Street, Melrose Avenue widens to a multiple lane road and manicured median as it flows westward into larger traffic streams.

Future streetscape designs should continue sidewalk and landscape improvements along the north edge of Melrose Avenue to the west of 24th Street to Forest Park Boulevard. Parcels opposite this segment on the southside of Melrose Avenue west of 24th Street, are two active Planned Unit Developments (PUD) that are regulated by specific development criteria not like the rest of the streetscape. Within one PUD is Lorton Park, a city maintained public space.

The area on the northside of Melrose Avenue is designated as a city Rehabilitation Zone. There are several parcels on the north edge of





Melrose Avenue from 24th Street running to the intersection of Forest Park Boulevard that are ripe for redevelopment; most specifically the parcels between Crescent Street and Forest Park Boulevard directly across the street from Lorton Park that accommodate a couple of single-story retail buildings. There is nothing architecturally significant about these structures, however there are moments of style flare either through the use of building materials or decorative ones. Of note among these spaces, restaurateur for the Screaming Vegan has innovated indoor and outdoor atmospherics creating a unique magnetism that can be leveraged and expanded for this area.

Opportunity Area 3: 24th Street from Melrose Avenue south to Loudon Avenue / Salem Turnpike

At the Southwest corner of the intersection of 24th Street and Melrose Avenue are two active Planned Unit Developments (PUD). Part of one PUD fronts on 24th Street and provides access to the Goodwill Industrial Center, Melrose Branch Public Library, Lorton Park and a fire station building converted into office space. Along the east side of 24th Street is a Giant Food convenience type store with vacant land yet to be paved or developed. The area north and east of the intersection of 24th Street and Melrose Avenue is designated as a city Rehabilitation Zone.



Left: The Screaming Vegan restaurant
Right: Concept diagram of neighborhood center



VISION FOR THE NEIGHBORHOOD CENTERS along Melrose Avenue 24th Street - RETAIL: COMMERCE & ENTERTAINMENT

The far-reaching residential revitalization programming in the district serves to underscore the need for additional retailing. Market and spending analysis findings further support the consumption of such goods and services for and within this community. The 3 Areas of Opportunity noted herein can significantly elevate community experience and economic impact as follows:



Opportunity Area 1 Implement Placemaking Concepts

The recent streetscape improvements made along this segment of Melrose Avenue are intended to enhance the area as well as elevate the level of pedestrian activity and experience. Although the commercial buildings on the south side of the road are uniquely sited, not all front facing or built to the street, there is a sense of neighborhood walkability with crosswalks and sidewalks at the roadway and between parcels from building to building. Parking access at each building is parcel-dependent, and not continuous around or between buildings. This can negatively impact the perceived walkability of the corridor; creating a one-stop destination trip versus a longer stay and stroll along the commercial corridor. Opening pathways or constructing 'bridging' moments between lots

creates a visual cue and invitation to entice pedestrian- versus vehicular-movement, which can result in a positive consumer experience as well as a heightened cultural and economic impact.

There is a certain inherent charm about this collection of buildings and blocks that can be expanded upon in an intentional and informed way. Most of the structures are inhabitable with minimal upfit, though some cosmetic attention is recommended. With minimal opportunities for infill development without demolishing existing structures or increasing density - - which is not recommended - - the implementation of select placemaking strategies would significantly enhance the vitality of this area. Suggested concepts include:



Public Realm & Placemaking

- Street furnishings (artfully crafted and finished) including benches, trash receptacles, and creative bus stop booths where appropriate.
- Artwork including wall murals, street lamp area identity banners, and creatively painted traffic light control boxes as well as gutter and sewer covers.
- Interstitial parklets created in some of the larger or awkward spaces that could entice pedestrian activity rather than inhibit it. Improvements include landscaping with shade, street furnishings and potentially public art or graphics for community bulletins or area storytelling.

Environmental Justice

- Enhancements to the landscape surrounding the electrical power towers to

mitigate the negative impact of its highly visible presence adjacent to a residential neighborhood and commercial artery. [Parcels 2321509-2321514]

Design & Development

- Facade enhancements including bold colors of paint and features such as signage, graphics and awnings.

Commercial Parcels Include:
 2322201, 2322203-2322208, 2322210-2322211, 2322301, and 2322303-2322307

Implementation Strategies

- The suggested improvements for Opportunity Area 1 can be implemented in stages, by the city or land/business owners, as resources are available.
- To incent revitalization of this stretch of the corridor, implement public realm,

placemaking and environmental justice aesthetic concepts as soon as possible to attract both investors and providers and ultimately consumers.

- Enterprise Zone 1A monies are available for qualifying businesses to activate and expand. Owners are more likely to “seed” here if the area “looks” like they can grow and prosper in this location. There are funding opportunities for facade and other improvements as well.
- Economic Incentives & Programs
 - Refer to the Economics Section of this report for funding sources for:
 - Placemaking concepts
 - Facade enhancements
 - Enterprise Zone incentives
 - Rehabilitation Zone incentives

**Initial 4 Parcels Include:**

- 2431613 @ 2801 Melrose Ave NW
- 2431117 @ 2719 Melrose Ave NW
- 2431123 @ 0 Melrose Ave NW
- 2431228 @ 2701 Melrose Ave NW

As popularity and consumerism grows, development can expand eastward along the north edge of Melrose Avenue towards 24th

Opportunity Area 2

Implement Destination Concepts

Renovated or completely redeveloped, the parcels at the intersection of Melrose Avenue and Forest Park Boulevard can be designed as a destination retail and entertainment experience attracting both nearby and outlying neighborhood residents. Redesigns to include concessions to reduce the extent of impervious surface and parking requirements, and prioritize an enhanced pedestrian experience over a predictable vehicular one. Introduce Smart Growth concepts to innovate and accommodate mobility as well as parking. Promote 'thin wheel' traffic by adding bike lanes, bike/scooter rental services and racks, wide walks and plazas for strollers and skaters, and then surround these spaces with entertaining and servicing retailers that consumers - - especially families and groups of people - - desire to consume.



OPPORTUNITY AREA 2

Street and connect with the commercial segment on the south edge in Opportunity Area 1 as well as continue expansion southward along 24th Street.

Additional Parcels over time:

- 2420301-2420308 and 2321501



Ditch the dash-in mentality. Create a multiple hour morning, afternoon and/or evening hang out by aggregating businesses for a shared experience. Ideas for local entrepreneurial or area chain stores include:

- Coffee & Ice Cream / Gelato
- Sweet Treats, Pastry, Bakery & Bagels
- Bookstore with reading niche, storytelling and guest readers
- Toys that Teach
- Music Store
- Niche, Gift & Craft Shop that carries community goods and consignments
- Barber Shop & Beauty Salon
- Sporting Goods & Services

- Bike Shop with sales and repair that also sells trailers for wee ones
- Unique Sandwich Shop, Cafes and Restaurants with outdoor patio/sidewalk dining and picnicking
- Plazas with picnic tables and lounge areas near water feature or pop jet fountain or “rinked” spaces for seasonal roller and ice skating
- Dog play park and dog-friendly shops

Redevelopment of the initial parcels can be a Public Private Partnership, and include public realm and placemaking concepts similar to Opportunity Area 1 further east on Melrose Avenue, including:

Public Realm / Placemaking

- Street furnishings (artfully crafted and finished) including benches, trash receptacles, and creative bus stop booths where appropriate.
- Artwork including wall murals, street lamp area identity banners, and creatively painted traffic light control boxes as well as gutter and sewer covers.
- Interstitial parklets created in some of the larger or awkward spaces that could entice pedestrian activity rather than inhibit it. Improvements include landscaping with shade, street furnishings and potentially public art or graphics for community



- bulletins or area storytelling.
- Street Art (painted road) on Forest Park Boulevard to visually connect parcels.

Community Building

- Street Art can be a community-created project

Design & Development

- Facade enhancements including bold colors of paint and features such as signage, graphics and awnings.

Implementation Strategies

- The suggested improvements for Area 2 can be implemented in stages, by the city or land/business owners, as resources are available.
- To incent revitalization of this stretch of the corridor, implement public realm,

placemaking and streetscape enhancement concepts as soon as possible to attract both investors and providers and ultimately consumers.

- Enterprise Zone 1A monies are available for businesses to activate and expand; and owners are more likely to “seed” here if the area “looks” like they can grow and prosper in this location. There are funding opportunities for facade and other improvements as well.
- For redevelopment of the initial 4 parcel concept, consider a Public Private Partnership composed of incentives and proffers to create the envisioned destination experience and economic - - as well as social-cultural - - impact at this location.



- Economic Incentives & Programs
 - Refer to the Economics Section of this report for funding sources for:
 - Placemaking concepts
 - Facade enhancements
 - Enterprise Zone incentives
 - Rehabilitation Zone incentives



OPPORTUNITY AREA 3**Opportunity Area 3****Community Services & Sustenance**

Continue redeveloping and enhancing this segment of 24th Street from Melrose Avenue to Salem Turnpike / Loudon Avenue to leverage the investments already made in the Goodwill Industries Center and Melrose Branch Public Library. An essential core element of a sustainable community is being cultivated here with supportive services for businesses, resources for community members, nutritional sustenance and healthy lifestyle choices., including:

- Redevelopment to attract a brand name

Grocery Store of 12,000 – 15,000 square feet. This store will carry affordable fresh foods (fruits, vegetables, dairy, fish, poultry, meats and deli) in addition to well-inventoried canned, dried and frozen foods and supplies that will serve to fill numerous gaps in the district. (Parcel 2322213)

- The Goodwill Center offers a superb opportunity for entrepreneurship development. In fact, Goodwill offers programming for microenterprise development in many areas. Goodwill could also serve as a center of pop-up businesses (both inside and outside the building).



- Create a small co-working space in the library to serve as a launch pad for microenterprise. The Small Business Development Center should keep regular hours at the Library.
- Renovate an existing structure or construct a small gym with proximity to Horton Park. This development can also be in collaboration with designs for Opportunity Areas 1 and/or 2. The facility could be in association with Parks & Recs, the YWCA, or a franchise such as Planet Fitness, Anytime Fitness or other type facilities. (Consider Parcel 2420203)

Public Realm / Placemaking

- Street furnishings including benches, trash receptacles, and creative bus stop shelters where appropriate.
- Artwork including wall murals, street lamp area identity banners, and creatively

painted traffic light control boxes as well as gutter and sewer covers.

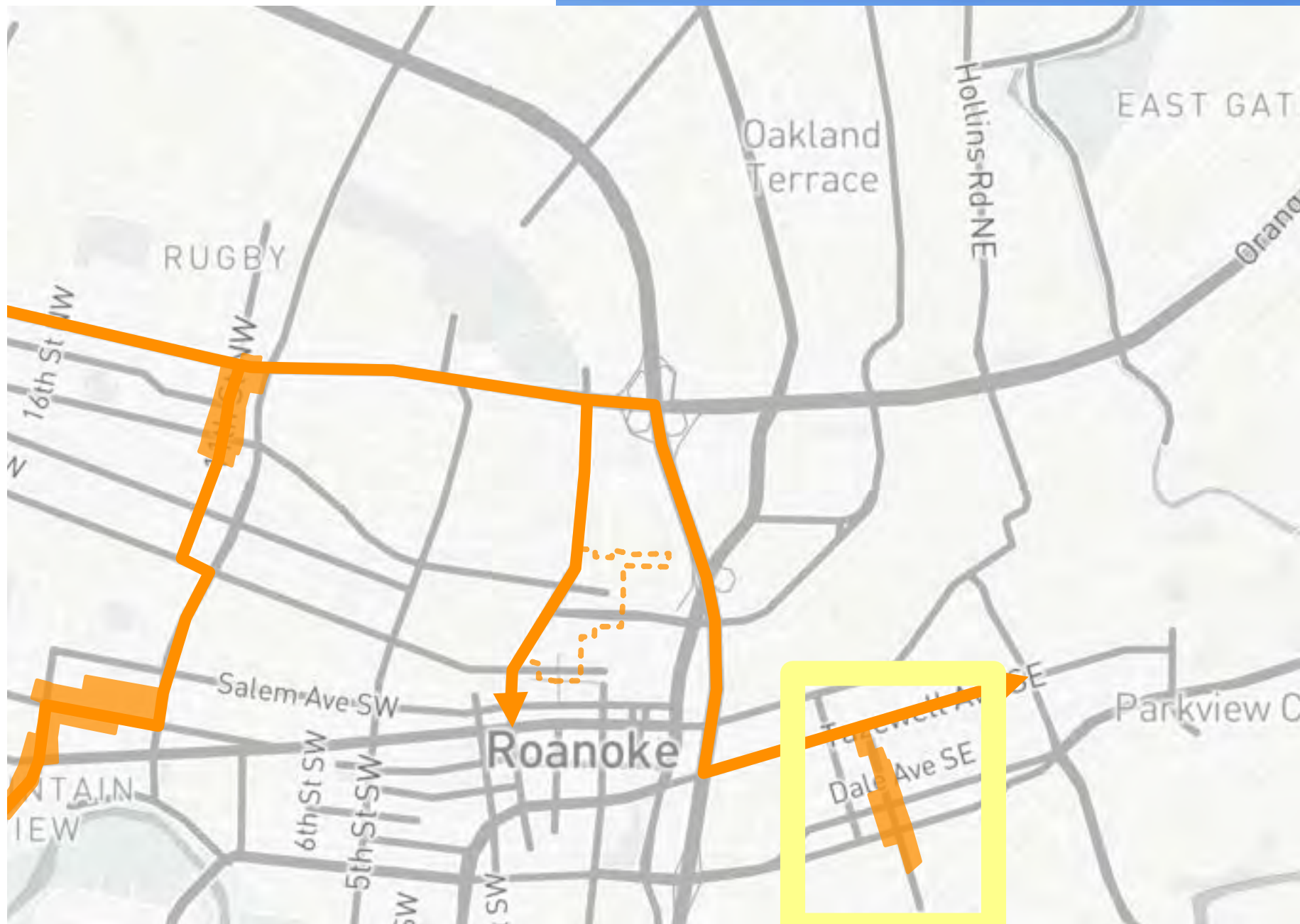
- Interstitial parklets created in some of the larger or awkward spaces that could entice pedestrian activity rather than inhibit it. Improvements include landscaping with shade, street furnishings and potentially public art or graphics for community bulletins or area storytelling.

Implementation Strategies

- The suggested improvements for Area 3 can be implemented in stages, by the city or land/business owners, as resources are available.
- To incent revitalization of this stretch of the corridor, implement public realm, placemaking and streetscape enhancement concepts as soon as possible to attract both investors and providers and ultimately consumers.
- Attraction of this type of grocery store will require incentives (see Incentive section),

and HUD 108 makes the most sense, but the long-term economic impact justifies significant development and business incentivizing. Area economics indicate this is prime time to entice a grocery store to this area, and its presence will catalyze development and invest in Opportunity Areas 1 & 2.

- Enterprise Zone 1A monies are available for businesses to activate and expand; and owners are more likely to “seed” here if the area “looks” like they can grow and prosper in this location. There are funding opportunities for facade and other improvements as well.
- Economic Incentives & Programs
 - Refer to the Economics Section of this report for funding sources for:
 - Placemaking concepts
 - Facade enhancements
 - Enterprise Zone incentives
 - Rehabilitation Zone incentives



THE
MINNOW
POND
BAIT, GUN
&
TACKLE CO.



th STREET SE

NEIGHBORHOOD PROFILE

Census Tracts: 002600, 002700

Conservation & Rehab: Conservation (north) and Rehabilitation (south) of Highland Avenue

Enterprise Zone: Zone 1A in spot locations

Opportunity Zone: N/A

Zoning: Commercial-Neighborhood (CN) along 9th Street; spot zoning elsewhere including Res Mixed Density (RM-1 and RM-2))

National Register: Belmont Historic District and Southeast Historic District (Eligible)

Design Overlay: Neighborhood Design District (NDD)

Neighborhood Planning: Belmont and Morningside

Neighborhood Organizations: Belmont, Southeast and Starview

Parks & Greenways: Belmont Park

Public Facilities: Belmont Park Branch Public Library



ENTERPRISE ZONE



HISTORIC DISTRICTS



NEIGHBORHOOD ORGANIZATIONS



ZONING



CONSERVATION & REHAB DISTRICTS



PARKS



NEIGHBORHOOD PLANNING



CENSUS DISTRICTS

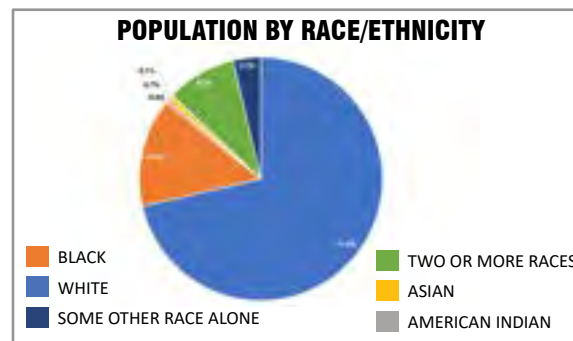
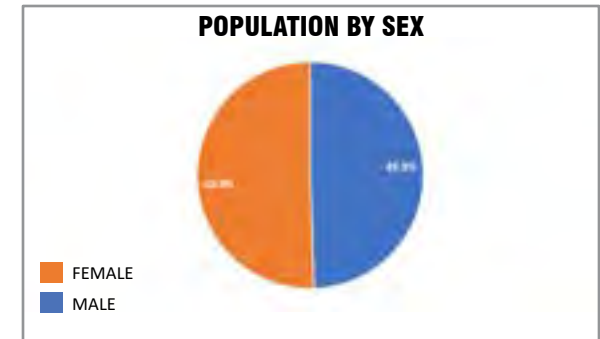
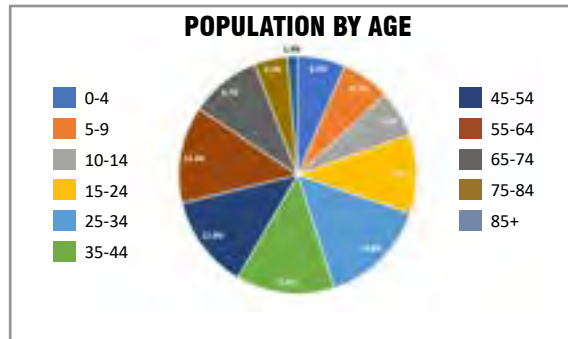
BRIEF INTRODUCTION TO THE BROADER NEIGHBORHOOD

As reported in the US Census (2020) and ESRI (2022), the 9th Street SE area has a population of nearly 5200 persons with a median age of 38 years; and approximately 2100 households with a median income close to \$29,400.

Demographics indicate residents are predominantly white (71%) and an even distribution of male to female residents, though it is unknown how these statistics are represented among the age groups or household composition. Of the housing inventory, 12% are vacant and the remaining units are evenly divided among renter-occupied and owner-occupied.

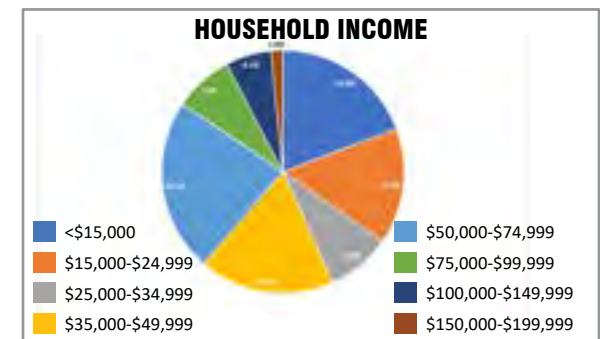
DEMOGRAPHICS

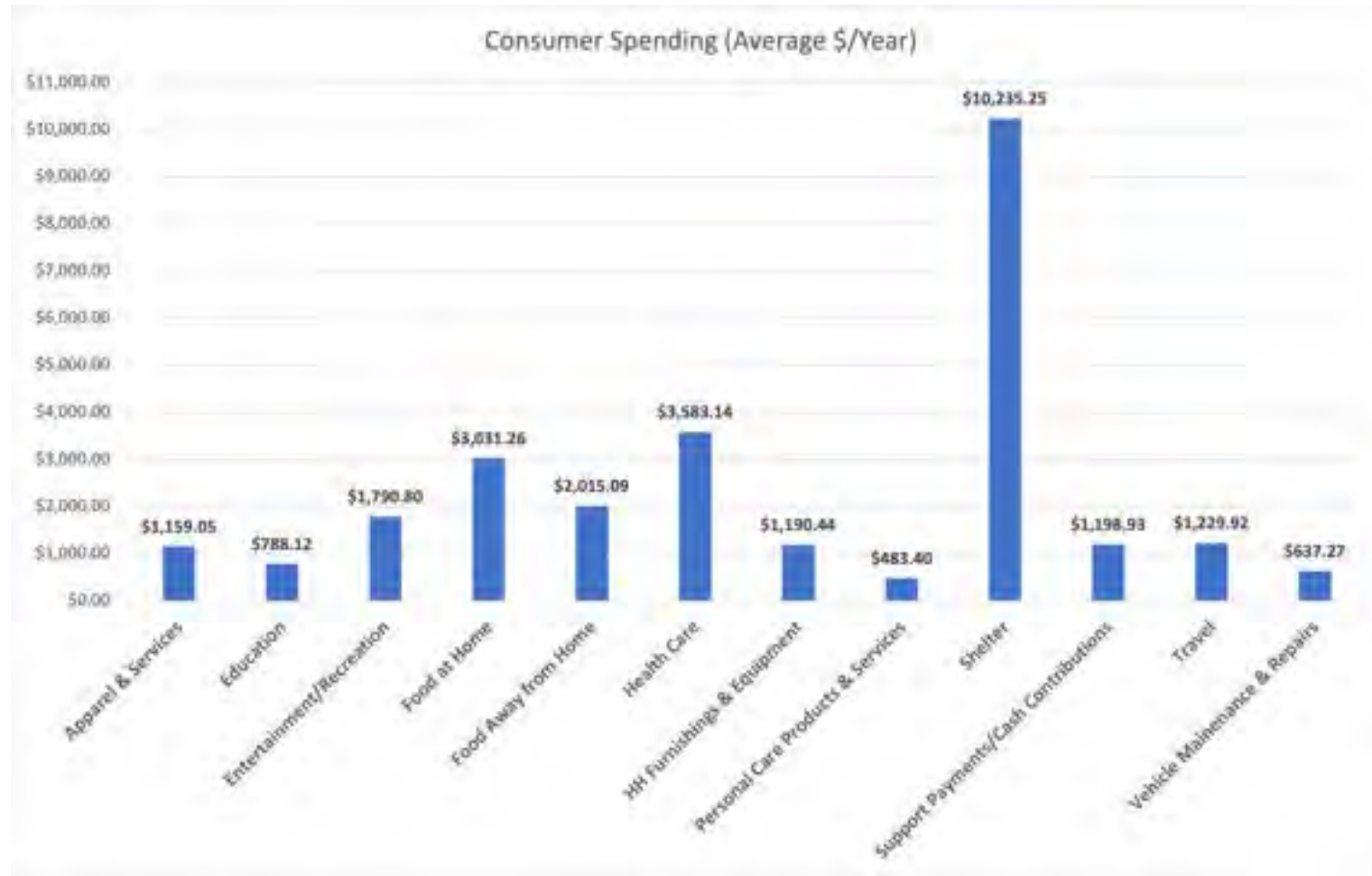
Total Population	5,158
Total Households	2,126
Average Household Size	2.43
Median Age	38.3
Median Household Income	\$39,361
Median Home Value	\$86,793



CURRENT BUSINESS OVERVIEW

Total Businesses in District	121
Total Employees in District	973
Service Businesses (41)	33.9%
Retail Trade Businesses (29)	24.0%
Construction Businesses (14)	11.6%
Wholesale Trade Businesses (4)	3.3%
Finance, Insurance, Real Estate Businesses (7)	5.8%
Manufacturing Businesses (4)	3.3%





Aside from the typical household and family expenses such as shelter, food and healthcare, consumer spending statistics indicate that area residents purchase food away from home almost as much as food at home; with entertainment/recreation the largest expenditure next to eating out. Travel, support payments / cash contributions, home furnishings and equipment, and apparel and services trend evenly and are each double what is spent on education, personal care products and services, and vehicle maintenance.

LIFESTYLE ANALYSIS

According to ESRI's Tapestry segmentation model for lifestyle analyses, there are three lifestyle segments for the 9th Street SE U.S. census tract. These three segments account for 100% of the population of the 9th Street SE census tract population:

Tapestry Segmentation	% of Census Tract Population	Percent of U.S. Household Population
Traditional Living	42.0%	1.9%
Hometown Heritage	30.5%	1.2%
Small Town Sincerity	27.6%	1.8%

More detailed information regarding the Lifestyle segments for each model and target neighborhood are included in Appendix A to this report.

Lifestyle Impressions Relevant to the 9th Street, SE Neighborhood:

Traditional Living (42.0%)

- Over 70% have completed high school or some college
- Labor force participation a bit higher than national average
- Almost three-quarters of households derive income from wages and salaries, augmented by Supplemental Security Income and public assistance
- Cost-conscious consumers comfortable with brand loyalty, unless the price is too high
- Connected and comfortable with the internet, and more likely to participate in online gaming or post pictures on social media
- TV is seen as the most trusted media

Hometown Heritage (30.5%)

- Education completed: 38% with a high school diploma only; 28% with some college or an associate's degree
- Higher rates of employment in manufacturing
- Labor force participation rate is lower at 57.1%

- Wages and salaries are the primary source of income for 70% of households, with contributions from Supplemental Security Income for 12% and public assistance for 7%
- Cost-conscious consumers who purchase sale items in bulk and buy generic over name brands
- They tend to save money for a specific purpose

Small Town Sincerity (27.6%)

- Education: 67% with high school diploma or some college
- Labor force participation lower at 52%, which could result from lack of jobs or retirement
- Income from wages and salaries, Social Security or retirement, increased by Supplemental Security Income
- Price-conscious consumers that shop accordingly, with coupons at discount centers
- Connected, but not to the latest or greatest gadgets; keep their landlines
- Community-oriented residents; more conservative than middle of the road
- Rely on television or newspapers to stay informed

ECONOMIC ASSESSMENT

This district is populated by a limited number of small businesses but is in the heart of the Southeast section of the City. The Southeast neighborhood is an active neighborhood with festivals and special events, trash pickups and other community activities. Much of the economic improvement in this section will be tethered to the public built environment and streetscape improvement. This will serve as a catalyst for additional businesses.



With respect to sales, we rank chain pharmacies on a scale of 1 to 5, with 1 being diminishing sales and 5 being the highest sales. Our analysis places the CVS nearby as a 2 and rising, which bodes well for additional development for chain stores. The amenities along and near the corridor establish the groundwork for a pleasant commercial corridor. For example, the nearby Belmont and Morningside Parks, as well as the Middle School, provide neighborhood anchors.

The Thrifty Bean coffee shop and boutique along the 9th Street corridor (although not in our study area per se) is thriving and serves not only the surrounding neighborhood, but other neighborhoods, as well.

Gaps in the District: Identifying Sustainable Businesses & Needs

- Chain Store Plaza (Grocery, Women's Clothing, Chain Restaurant)
- Hair Salon
- Nail Salon
- Independent Restaurant
- Brew Pub
- Garden Supplies
- Office Space for Service Businesses

PUBLIC COMMENT

Using a "top of mind" approach, 39 People were intercepted on 9th Street in this designated corridor and asked for their general impression of the community as it exists today.

Ranked by frequency of mention, the most often observations (some contracted into similar comments) include;

- No place to shop
- School kids cause problems after school
- CVS is positive for the neighborhood but need other chains
- Small businesses come and go
- Need jobs for kids in neighborhood
- Need to get the attention of City



SPECIFIC AREAS OF INTEREST for the NEIGHBORHOOD CENTER

The commercial segment of 9th Street SE extends from Tazewell Avenue SE to Murray Avenue SE before transitioning into predominantly residential areas with schools, a library and park, and several neighborhood churches. The blocks between Tazewell and Jamison Avenues have a wide landscaped median and are lined with large scale period buildings of institutional and commercial use. There is a notable down-scaled transition at Jamison that carries through to Highland Avenue. The 2.5 to 3 block corridor, between Jamison and Highland Avenues, is populated with smaller scale buildings, most of which are independent structures with merchants providing neighborhood services such as personal care (CVS), banking, neighborhood mart and some food service.

The residential area south of Highland Avenue is primarily zoned Residential Mixed Density (RM-1) with spots of Institutional (IN), Commercial-Neighborhood (CN) and Recreation and Open Space (ROS) among others. Additionally, this area is designated as a Rehabilitation Zone and is in the Southeast Historic District (Eligible). The area north of Highland Avenue to Tazewell Avenue is predominately zoned Commercial-Neighborhood (CN) with pockets of Institutional (IN), and Res Mixed Density (RM-1 and RM-2). Additionally, this area is designated as a city Conservation Zone and is within the Belmont Historic District.

For this report, initial ideas for a Neighborhood Center in this area will focus primarily on the properties front-facing 9th Street along the 3-blocks between Jamison and Highland Avenues. The Commercial-Neighborhood (CN) areas further south along 9th Street into the residential areas from Woodrow Avenue to the rail tracks will benefit in due time from the economic impact that can be generated in the blocks around CVS. Much of this section is within the Enterprise Zone 1A, however, no "Opportunity Zones" (not to be confused with Opportunity Areas) are designated in this area.

These concepts can be applied to other properties along the entirety of 9th Street southward to the old Viscose Plant as additional interest and development opportunities arise.





These centers are an investment (public and private). As projects get underway, the role and importance of strong code enforcement and policing will be significant in the initial development process and throughout the stabilization periods. It will be critical to maintain focus on the maintenance of city ROW and facilities, timely trash collection, and other essential City services.



VISION: PERSONAL SERVICE & COMMUNITY CARE

The portion of 9th Street SE between Jamison and Highland Avenues is central in this community; linked to the residential neighborhood on the south and the commercial and institutional sections running north to Tazewell Avenue. Some of the existing businesses in this 3 block area include CVS, Carter Bank & Trust, thrift and pawn shops, mattress store, convenience marts and restaurants; and are best described as service providers for the fulfillment of needs of individual consumers more over than businesses. This is the ideal location to continue cultivating these types of operations as well as create opportunities for smaller entrepreneurial ones to set up shop. Additional services that would complement current merchant offerings might include:

- Shoe repair and alterations
- Consignment and gift shops
- Dance studio
- Barber and beauty salon or spa
- IT small device repair (not just sales)
- Coffee Shop and/or Restaurant with space for solopreneurs to meetup/work
- Independent restaurants and merchants
- Businesses that will employ teens and young adults for evening, weekend and summer shifts, in addition to general full time workforce employment

The buildings along this corridor are in relatively decent condition, although some cosmetic attention is recommended for the outdated or poorly maintained facades. Buildings are sited such that the car is privileged over the consumer experience, with attention placed on parking not window displays or visual merchandising. There is no opportunity or enticement for walking and window shopping in this area, so every building and business in it becomes a single distinct dash-in experience.





With minimal opportunities for infill development without demolishing existing structures or increasing density - - which is recommended in some locations (see Opportunity Areas below)- - the implementation of select placemaking strategies would significantly enhance the vitality of this area whatever level of redevelopment is adapted now and in the future. Suggested concepts include:

Public Realm & Placemaking

- New manicured median that is a compatible design, not a precise match, with the median north of Jamison Avenue. Design median to terminate at the intersection of

- Highland Avenue and 9th Street.
- New crosswalks at each intersection of Elm and Highland Avenues with enhanced crosswalks at each intersection of Jamison and Bullitt Avenues to promote walkability and connectivity.
- Sidewalk improvements and landscaping from Jamison Avenue to Highland Avenue including the neighborhood mart parcel (Reference 4122521).
- Streetscape furnishings (artfully crafted and finished) including benches, trash receptacles, and creative bus stop booths where appropriate.
- Artwork including wall murals, street lamp area identity banners, and creatively

painted traffic light control boxes as well as gutter and sewer covers.

- Small roundabout with sign or public art at intersection of 9th Street and Highland Avenue, or an aerial sign structure.

Design & Development

- Facade enhancements including bold colors of paint and features such as signage, graphics and awnings.



Images: Existing Buildings

Opportunity Area 1: Intersection of Jamison Avenue and 9th Street

Improvements to the buildings and sites at this intersection would significantly contribute to community character and area economics.

The northeast corner at the intersection of 9th Street and Jamison Avenue is paved to accommodate parking for the adjacent Valley Masonry and Eatwell Chili Shop businesses in a building that appears to have been at one time an auto repair and/or gas station. The adjoining property just north of this lot contains a boarded up single-family detached dwelling that once housed the offices of Peliz LLC; now temporarily closed. There is an undeveloped parcel north of this house, and both properties are owned by the same entity.

Redevelopment of these 3 properties is recommended to establish a stronger corner presence and commercial foothold for the community and this corridor as a neighborhood center. Concepts include multiple storefronts and cafes, or a larger restaurant, with sidewalk dining; built to the street with parking to the rear as well as on-street designated pick-up/delivery spaces. Complete redesign of these parcels and structures is recommended if allowed within the covenants of the governing Historic District. Otherwise, adaptive reuse and in-fill development is suggested.

Parcel References:

- 4120208 Vacant Lot
- 4120207 Vacant House / Commercial Use
- 4120208 Commercial Property / Valley Masonry & Eatwell Chili Shop (tenants)

The Salvation Army Thrift Store and Inner City Ministries is located at the northwest corner of this intersection; addressed on Jamison Avenue with its storefront built to and front facing that roadway. The side of the building and its parking lot face 9th Street. The agency's dumpster, palette trays, trash piles and other "back of the yard" type items are currently located on this parking lot; in full view. Relocation of said items to a less prominent view or discrete space is recommended. If, however, no other location is available then the construction of a service corral is recommended to improve the streetscape appearance to benefit this and surrounding properties as well as passersby. The building face and the service corral can be further enhanced through Placemaking Art such as wall murals of faux storefronts exhibiting ministry work or their target audiences, as well as creative enclosures not dissimilar to the artist bus stop shelters.



Parcel References:

4120117 & 4120119 Commercial Property /
 TSA & Ministries Thrift (tenant)

To the west of TSA & Ministries Thrift are 2 small single-story commercial buildings on a single site. The first, Impressive Carpet Cleaning, is tucked way back off the street nestled up to the thrift store; and the second is a Papa John's Pizza pick-up / delivery spot.

Parcel Reference: 4120701

Currently a Pawn Shop, the large building (15,609 SF) located on the southeast corner of this intersection is a desirable spot for a restaurant or retail shop in further fulfillment of the community's needs and increased area economics as well as consumer "traffic flow".

This property is zoned within Enterprise Zone 1A.

Parcel Reference: 4120701 Pawn Shop (tenant)

Implementation Strategies

- The suggested improvements for Opportunity Area 1 can be implemented in stages, by the city or land/business owners, as resources are available.
- To incent revitalization of this stretch of the corridor, implement public realm and placemaking aesthetic concepts as soon as possible to attract both investors and providers and ultimately consumers.
- Enterprise Zone 1A monies are available on the south side of Jamison Avenue for qualifying businesses to activate and

expand their operations and facilities. Business owners are more likely to "seed" here if the area "looks" like they can grow and prosper in this location. There are funding opportunities for facade and other improvements as well.

- Incent the relocation of the Pawn Shop and the redevelopment of the site for a chain dine-in family type restaurant (not fast food) or home goods store (like furnishings and garden, or local merchant version of Home Depot).
- Economic Incentives & Programs
 - Refer to the Economics Section of this report for funding sources for:
 - Placemaking concepts
 - Facade enhancements
 - Enterprise Zone incentives
 - Conservation Zone incentives
 - Historic Tax Credits



Opportunity Area 2: West side of 9th Street between Bullitt and Jamison Avenues

The block and buildings on the parcels west of 9th Street between the noted intersections include a Hardee's Restaurant and Mattress Wholesaler. They are directly opposite the businesses on the east side of 9th Street which include the Pawn Shop and Carter's Bank & Trust. The mattress company building was once the location of The Minnow Pond Bait, Gun & Tackle Co that has since permanently closed, though its site sign remains on the corner of Bullitt Avenue and 9th Street. This sign signals a bygone era and, by association, an economy in decline; securing a new tenant for this building is a priority.

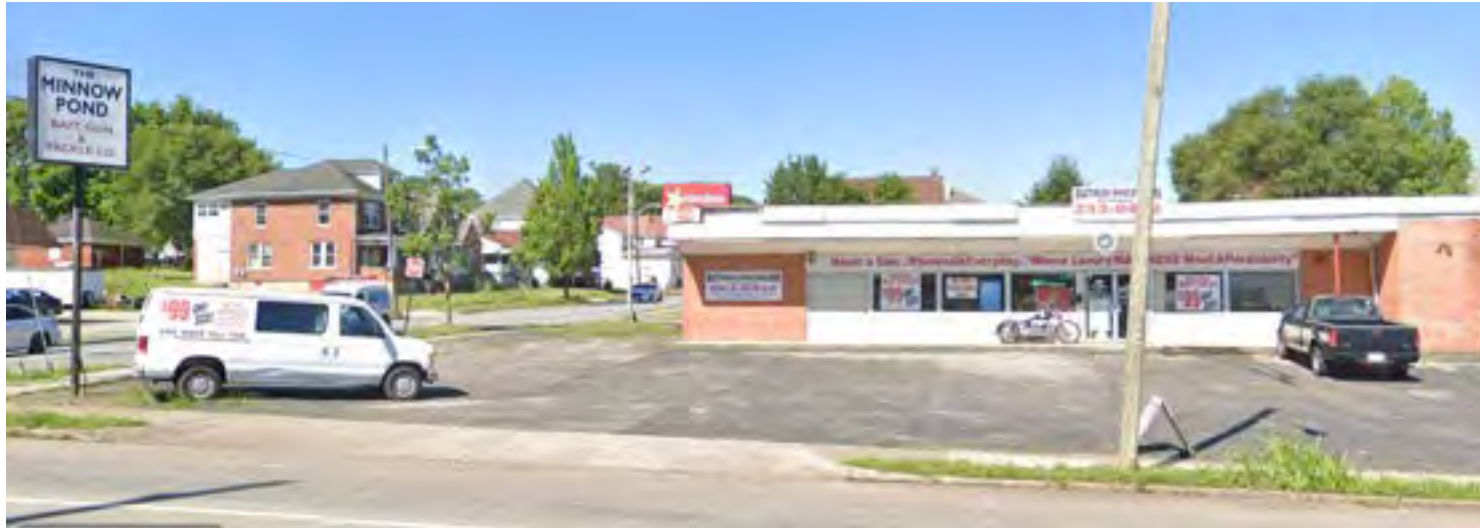
These parcels are in the center of this 3 block focus area, and as such have the potential for attracting prominent businesses into this

neighborhood center. At minimum, seek tenants that have a broader consumer base and draw (such as a home goods shop, barber/beauty service and supply, or garden center) moreover than a narrower single specific use **(like mattresses)**. **AND, reworking the facade** and implementing placemaking concepts would further uplift this area.

The collective acreage (1.34) for these parcels is controlled by 2 land owners, and in association could redevelop this block into something of higher and better use to greater economic impact. Design and construction to employ concepts around Smart Growth, mixed-use, increased density (though not intensity), and reduced parking requirements to mitigate extensive impervious surfaces. Bike/scooter racks and rentals are good additions in either case.



Images: Adaptive Reuse (top); Mixed-use Infill (bottom)



The buildings on this block don't appear to be contributing to the historic fabric of the neighborhood. Complete redesign of these parcels and structures is recommended if allowed within the covenants of the governing Historic District. Otherwise, adaptive reuse and in-fill development is suggested.

Parcel References

- 4120604-4120609 Commercial Property (Owner 1) / Hardees Restaurant (tenant)
- 4120616-4120618 Commercial Property (Owner 1) / parking lot
- 4120616-4120619 Commercial Property (Owner 2) / Mattress Wholesalers (tenant)

Implementation Strategies

- The suggested improvements for Opportunity Area 2 can be implemented in stages, by the city or land/business owners, as resources are available.

- To incent revitalization of this stretch of the corridor, implement public realm and placemaking aesthetic concepts as soon as possible to attract both investors and providers and ultimately consumers.
- Enterprise Zone 1A monies are available for qualifying businesses in this area to activate and expand their operation and facilities. Business owners are more likely to “seed” here if the area “looks” like they can grow and prosper in this location. There are funding opportunities for facade and other **improvements as well.**
- Incent the redevelopment of the blocks in Opportunity 2 & 3 in a Public Private Partnership.
- Economic Incentives & Programs
 - Refer to the Economics Section of this report for funding sources for:
 - Placemaking concepts
 - Facade enhancements
 - Enterprise Zone incentives
 - Conservation Zone incentives



Opportunity Area 3

West side of 9th Street at the southwest corner of Bullitt Avenue and 9th Street

Similar to Opportunity Area 2, the buildings and tenants occupying these parcels can be enhanced with facade improvements and Placemaking concepts. The current tenants provide a useful everyday service to the surrounding community. If redeveloped, the site and new building could also employ concepts around Smart Growth, mixed-use, increased density (though not intensity), and reduced parking requirements to mitigate extensive impervious surfaces. Developing Area 2 and 3 simultaneously would exponentially impact the economic vitality of this area. The walkable community that could be created between these several blocks would also create market attraction for residential units over the ground floor public venues.

Commercial Parcels

- 4121307-4121308 Vacant (Owner 1) / Parking Lot
- 4121309 Commercial Property (Owner 1) / Metro PCS, Cleaners & Laundromat (tenants)

The properties at the north west corner of Elm Avenue and 9th Street adjacent to the Cleaners parcel appear to be an undeveloped lot and a boarded up single-family detached dwelling. These parcels “complete” the block fronting on 9th Street between Bullitt and Elm Avenues immediately opposite the CVS store across the street. As such, this space could nicely contribute to the design of a neighborhood center if redeveloped as part of it. This property is currently zoned Commercial-Neighborhood (CN) and it is NOT within the Enterprise Zone 1A, although special consideration should be

explored. The property does fall in the bounds of the historic district and designated conservation zone.

The buildings on this block between Bullitt and Elm Avenues don’t appear to be contributing to the historic fabric of the neighborhood, although the house may. Complete redesign of these parcels and structures is recommended if allowed within the covenants of the governing Historic District. Otherwise, adaptive reuse and in-fill development is suggested.

Implementation Strategies

- The suggested improvements for Opportunity Area 3 can be implemented in stages, by the city or land/business owners, as resources are available.
- To incent revitalization of this stretch of the corridor, implement public realm and placemaking aesthetic concepts as soon as



possible to attract both investors and providers and ultimately consumers.

- Enterprise Zone 1A monies are available for qualifying businesses to activate and expand. Owners are more likely to “seed” here if the area “looks” like they can grow and prosper in this location. There are funding opportunities for facade and other improvements as well.
- Incent the redevelopment of the blocks in Opportunity 2 & 3 in a Public Private Partnership.
- Extend the Enterprise Zone 1A south to Elm Avenue if possible.
- Economic Incentives & Programs
 - Refer to the Economics Section of this report for funding sources for:
 - Placemaking concepts
 - Facade enhancements
 - Enterprise Zone incentives
 - Conservation Zone incentives



ECONOMIC ANALYSIS & INCENTIVES

NEIGHBORHOOD COMPARISON

BUSINESS OVERVIEW	GRANDIN COURT	CRYSTAL SPRINGS	WASENA	11th STREET	WEST END	MELROSE AVENUE	9th STREET
Total Businesses in District	84	255	101	119	147	376	121
Total Employees in District	1,532	3,539	582	1,203	1,296	4,218	973
Service Businesses	(40) 47.6%	(122) 47.8%	(40) 39.6%	(51) 42.9%	(61) 41.5%	(161) 42.8%	(41) 33.9%
Retail Trade Businesses	(11) 13.1%	(55) 21.6%	(29) 28.7%	(20) 16.8%	(18) 12.2%	(76) 20.2%	(29) 24.0%
Construction Businesses	(7) 8.3%	(11) 4.3%	(8) 7.9%	(9) 7.6%	(25) 17.0%	(30) 8.0%	(14) 11.6%
Wholesale Trade Businesses	(7) 8.3%	(7) 2.7%	(3) 3.0%	(11) 9.2%	(17) 11.6%	(29) 7.7%	(4) 3.3%
Finance, Insurance, Real Estate Businesses	(7) 8.3%	(34) 13.3%	(14) 13.9%	(4) 3.4%	(3) 2.0%	(22) 5.9%	(7) 5.8%
Manufacturing Businesses	(3) 3.6%	(3) 1.2%	(0) 0.0%	(9) 7.6%	(15) 10.2%	(15) 4.0%	(4) 3.3%
DEMOGRAPHICS							
Total Population	5,006	5,557	3,891	2,653	2,123	15,973	5,158
Total Households	2,330	2,488	1,977	1,129	853	6,457	2,126
Average Household Size	2.1	2.14	1.97	2.41	2.45	2.45	2.43
Median Age	39.0	50.8	38.7	35.8	34.8	37.1	38.3
Median Household Income	\$54,778	\$118,181	\$62,149	\$22,460	\$25,758	\$27,596	\$39,361
Median Home Value	\$197,359	\$421,209	\$204,779	\$85,828	\$101,667	\$106,399	\$86,793

ROANOKE: Economic Vision

INTENTION & STRATEGIES

As noted in the Roanoke City Manager Bob Cowell's Blog Post of 01.03.22, Roanoke City received \$64.5 million dollars through the American Rescue Plan Act (ARPA) to respond to the impacts of COVID-19. After much input and involvement from a Citizen-base Advisory Panel, recommendations to build resiliency and transform the community were made to City Council in the fall of 2021 for implementation throughout 2022. See the entire blog post here: <https://www.roanokeva.gov/Blog.aspx?IID=262>

With these monies, the City will "invest in programs and initiatives that benefit people, places and governance in a way that enhances prosperity and health and well-being," The first initiatives of smaller monetary awards have been aimed at recovery projects offering fast results in specific market segments such as healthcare, transportation, and the workforce,

including small business grants. The larger, more expensive resiliency projects would aim to improve the city experience overall. In total, the City estimates it will take \$36 million worth of investments for the nine projects. It is reported that funds are to be spent in their entirety by 2024. See the news coverage here: <https://www.wdbj7.com/2021/09/22/american-rescue-plan-act-projects-approved-by-roanoke-city-council/>

In the City's Strategic Plan 2020-2021, City Council identified seven priority areas to focus attention and resources for these community investment funds:

- Education
- Community Safety
- Human Services
- Infrastructure
- Good Government

And of particular note:

- Livability ... *"Through use of ARPA funds we will progress on two neighborhood hubs in the Northwest—one in Gainsboro, and the other on Melrose, focusing on job creation and access to health care and fresh food."*
- Economy ... *"Through use of ARPA funds, the City will also invest heavily in new job training programs, seeking to connect those in our community with job opportunities in growing strong sectors, through targeted access to specific skills."*

Elaboration on all of these priority points is summarized in the City Manager's post noted above and at length in the City's Strategic Plan 2020-2021 linked here: <https://www.roanokeva.gov/DocumentCenter/View/14907/Roanoke-City-Council-Strategic-Plan-2020-2021pdf>

ECONOMIC OPPORTUNITIES & STRATEGIES**Retention of Community Engagement Firm**

Of utmost importance to the revitalization of the neighborhood centers discussed in this Report is the retention by the City of Roanoke of a community engagement firm with extensive experience with diverse constituencies. This community engagement firm should be retained to conduct a phased engagement approach that elicits input from the neighborhood stakeholders at benchmarked points throughout the revitalization process to ensure that all voices are heard on the prospects for each neighborhood center.

Community Events

To kick off the revitalization efforts in each neighborhood center, we recommend that the City staff elicit the support of one or two major developers in each community to host a community night to discuss development opportunities. Community stakeholders, as well as representatives of the Incremental Development Alliance, the American Planning Association, the Urban Land Institute and DHCD/Main Street, should be invited to provide input during the events. The City staff should use its contacts with the Rotary and Kiwanis

Clubs, Shriners, Masons, and other social and fraternal organizations to help establish the meetings in each community.

Neighborhood Center Branding

Branding is essential to the overall character and appeal of each neighborhood center. We recommend a small-scale branding initiative in each neighborhood that incorporates street banners and wayfinding signage. This approach establishes and identifies boundaries for each neighborhood center. Banners have been implemented to some extent in the West End, and establishing a unique sense of place in each neighborhood could be accomplished easily without great expense.

Additional placemaking efforts can be utilized in each neighborhood center. Some of this has been addressed in our placemaking recommendations throughout this Report, but it warrants discussion here, as well. We recommend the creation of painted crosswalks painted by local area artists, along with public refuse cans that align with the brand of each neighborhood. Where possible, the creation of artwork in alleyways can transform forgotten areas into gathering spaces. Pop-up signs can be created and displayed every few weeks that highlight the history or character of each neighborhood. Public sculpture crafted by local

artisans could be placed in prominent locations within the community. All of these elements will create a unique experiential narrative for each neighborhood center.

To leverage Roanoke's rich history, we recommend that the City establish small kiosks in each neighborhood center with interactive informational hubs relevant to the neighborhood's history or the background of specific buildings or landmarks. These kiosks could include a historical marker with buttons that play audio files that impart the details of each marker, as has been done in Gainsboro, or by utilizing QR technology that would allow visitors to scan a code and link to a video on his or her personal mobile device.

Additionally, as revitalization efforts commence, the City could install an interactive touch screen exhibit in each community that would allow residents to create their own unique vision for the neighborhood. They could save their creations and submit them to the City from the interactive terminal. This is another way in which the residents will feel as if their opinions about their neighborhoods are being heard by the City. We are not naïve in our recommendations regarding technological resources – the kiosks and any interactive exhibits would require high quality materials, as well as damage and theft-resistant safeguards.

RECOMMENDATIONS FOR IMPLEMENTATION & TOOLKIT

A local **Communication Plan** is the initial step to implementing the recommendations in this Report. The City staff, in conjunction with the City's communications team, can produce a press packet relative to the recommendations and liaise with the local media regarding the City's desire to revitalize the target neighborhoods. Following this initial press interaction, the City can produce vision renderings of what vacant sites in each neighborhood could look like as part of the revitalization efforts. This is particularly important in the 11th Street neighborhood center.

Next, the City can embark on hosting **Community Events** as discussed above to bring together local developers, community planning and development organizations and neighborhood stakeholders to partner in the process with the City. The Economic Development staff can reach out to assist in the formation of business associations in the communities where such an association does not exist. This can be done by using CDBG analysis funds to conduct research into the formation of the organizations. Existing civic associations can provide the names of business

owners to serve as the foundational members of the newly-formed business associations. The City should utilize its community engagement firm to stay in close contact with the civic and business associations throughout the revitalization process.

The Toolkit of incentives provided in this Report are recommended for use in all of the target neighborhoods. We do not suggest only using specific incentives for each neighborhood. Specific incentives depend on who is developing, financing and/or using what is being created. We strived to provide an incentive package that can be used holistically throughout the communities.

Visualization is the key to buy-in by the community. The City should create signage for each community that provides a vision rendering of the prospective revitalized property or area, along with the list of incentives to be utilized for the redevelopment. The Economic Development staff can determine which incentives to place on each sign based on their experience with the various incentive programs. If property owners are willing, the signage should be placed on private property. If not, the signs can be placed on City property adjacent to the affected properties or areas.

With respect to **land acquisition**, we recommend starting with the HUD Section 108 program, coupled with programs from Virginia Community Capital, DHCD and existing local incentives. The Economic Development staff should prepare materials based on the incentives outlined in this Report that can be provided to prospective developers.

LIFESTYLE ANALYSIS

	Grandin	Grandin	Crystal Spring	Crystal Spring	Wesana	Wesana	11th Street	11t Street	Melrose Avenue	Melrose Avenue	West End	West End	9th Street	9th Street
Tapestry Segmentation	% of Census Tract Population	Percent of U.S. Household Population	% of Census Tract Population	Percent of U.S. Household Population	% of Census Tract Population	Percent of U.S. Household Population	% of Census Tract Population	Percent of U.S. Household Population	% of Census Tract Population	Percent of U.S. Household Population	% of Census Tract Population	Percent of U.S. Household Population	% of Census Tract Population	Percent of U.S. Household Population
Old & Newcomers	63.3%	2.3%												
Emerald City	24.8%	1.4%			72.4%	1.4%								
Hometown Heritage	11.9%	1.2%							5.5%	1.2%	43.5%	1.2%	30.5%	1.2%
City Commons							46.9%	0.9%	37.9%	0.9%	56.5%	0.9%		
Modest Income Homes							53.1%	1.2%	29.0%	1.2%				
Family Foundations									27.6%	1.0%				
Traditional Living													42.0%	1.9%
Small Town Sincerity													27.6%	1.8%
In Style			22.3%	2.2%	27.6%	2.2%								
Urban Chic			21.9%	1.3%										
Top Tier			18.2%	1.6%										
Golden Years			37.5%	1.3%										

NOTE: More detailed information regarding the Lifestyle segments for each type and target neighborhood are included in Appendix A to this report.

ROANOKE: Economic Enterprise and Entrepreneurship

THE IMPORTANCE OF ENTREPRENEURSHIP FOR COMMERCIAL DISTRICT REVITALIZATION IN TARGETED COMMERCIAL CORRIDORS

Our analysis has identified several opportunities for revitalization of the targeted neighborhoods in Roanoke. It is essential that each neighborhood be viewed through the lens of entrepreneurship. The Small Business Development Center and the Advancement Foundation should be engaged and presented with information about each targeted commercial district.

The Advancement Foundation has been actively engaged in Roanoke, and its Gauntlet business plan competition is well known regionally. We would recommend working closely with the Advancement Foundation to continue that effort with an eye toward the targeted neighborhoods.

We further recommend that local/regional banks be approached about conducting a quarterly business plan competition, with the winner locating in one of the commercial corridors. Local banks need to maintain a robust Community Reinvestment Act portfolio and a business plan competition is one way to accomplish that end.

The Roanoke Regional Small Business Development Center should be provided information on each district and encouraged to keep hours in the districts, if feasible. Small business owners completing training at the Small Business Development Center have already conducted market research, sought out funding, and have a business plan in place. These should be targeted for location in the commercial districts.

The Virginia Department of Housing and Community Development (DHCD) Business

Launch Program can play a key role in commercial district revitalization. We recommend that DHCD be made aware of the targeted commercial areas.

SCORE Roanoke is also an organization actively engaged in the development of entrepreneurs. We recommend establishing a tour of the districts, as well as a list of incentives to SCORE staff. Again, those who have completed training have conducted market research, developed a business plan, and sought financing options.

Virginia is for Entrepreneurs / Abaca aligns entrepreneurs with investors and other support organizations (accelerators, bootcamps, and more) on where their startup stands now and a roadmap for where to go next.

INCENTIVES, IDEAS & ACTIVITIES FOR REVITALIZATION OF ALL CORRIDORS

- **HUD Section 108 Program** — select programs such as a grocery store on Melrose and land acquisition on 11 th Street NW for use of the HUD 108 program. This is a loan guarantee program that was used for the Hotel Roanoke.
- **Loan Pool** — establish programs with local banks for working capital for businesses/ developers who cannot obtain conventional financing. Local banks have a vested interest in the community and need to ensure their Community Reinvestment Act portfolios are sound. Larger national banks tend to be less inclined to participate in loan pools.
- **Historic Tax Credits (HTC)** — refer to National Park Service U.S. Department of Interior for details. Link: <https://www.nps.gov/tps/tax-incentives.htm>
- **Main Street Program** — establish an organization in the West End.
- **Tax Exemption** — expand program to buildings constructed before 1990.
- **Virginia Economic Development Partnership** — ensure that all vacant land is listed with the VEDP
- **New Market Tax Credits (NMTC)** — market to Regional Developers.
- **Enterprise Zones** — examine the benefit of expanding select areas and projects
- **Opportunity Zones** — investigate the viability and procedures to expand the boundaries of existing zones. Explore conversations with the Federal Reserve.
- **Small Business Development Center** — tips and resources for operations, marketing, expansion and real estate. Excellent mentorship and networking opportunities as well.
- **DHCD Community Business Launch Program** — continue participation and work with DHCD on entrepreneurship ecosystem development with each corridor targeted.
- **Virginia Community Capital** (and, if desired, another Community Development Finance Agency) — formalize an agreement to target the neighborhood commercial corridors. Continue establishment of relationship with the CDFI Coalition.
- **Federal EDA** — actively apply for grants with matching funds for property acquisition in the targeted neighborhood corridors.
- **ARPA Funds** — designate use for a grocery store and land acquisition.
- **Bridging Virginia** — a source of financing for small businesses in commercial corridors.
- **Leaseholder Improvement Program** — create a new incentive program for renters that provides grants up to \$25,000 and 50% reimbursement on any work thereafter.
- **Sidewalk Café Grants** — to promote and expand businesses
- **Neighborhood Development Grant Program** — through CDBG
- **Deed Funding** — funding opportunities that can be matched with other resources mentioned herein.
- **Smart Growth Grants** — ideas and resources that promote and incent smart development and community health and wellbeing.

- **Placemaking Grants** — ideas and resources for individuals, organizations and governments to collaboratively create places that support and reflect the community.
- **Environmental Equity Grants** — funding for improving environments in marginalized communities
- **Community Benefit Grants** — funding and/or tax abatement for the relocation of an intense commercial-industrial use (like scrap yard) elsewhere to allow the vacated property to be developed for community benefit (i.e., grocery, community garden, mixed use building, etc).
- **Brownfield Tax Credits** — Brownfields are properties in which redevelopment or reuse is complicated by the presence of hazardous materials, pollution, or contaminants.
- **Community Improvement Districts (CID)** — a defined area of non-residential properties, whose owners choose to pay an additional tax or fee for services (like street cleaning, security, marketing the area) and improvements (i.e, constructing pedestrian and streetscape enhancements). Benefits include leveraging available resources (city grants / incentives for tax abatement, etc) that individual property owners cannot on their own, among others.
- **Low Income Housing Tax Credits (LIHTC)** — tax credits for the acquisition, rehabilitation, or new construction of rental housing targeted to lower-income households.
- **Tax Abatement** — a decrease in the assessed valuation of a property resulting in a reduction in the yearly real estate taxes for a specified period of time.
- **Tax Increment Financing (TIF)** — allows local governments to invest in public infrastructure and other improvements up-front. Local governments can then pay later for those investments.
- **Transportation Development Districts (TDD)** — a special-purpose district created for the purpose of coordinating and financing transportation infrastructure improvement programs, particularly road construction projects in specific areas.

HUD Grants

CITY OF ROANOKE HUD ENTITLEMENT GRANTS RECOMMENDED 2022-2023 ANNUAL PLAN EXECUTIVE SUMMARY

For the fiscal year beginning July 1, 2022 through June 30, 2023 (FY 22-23) The City of Roanoke anticipates receiving approximately \$ 2.7 million in new entitlement funds annually from the U.S. Department of Housing and Urban Development (HUD) in three grants: Community Development Block Grant (CDBG), HOME Investment Partnerships (HOME) and Emergency Solutions Grant (ESG).

According to reports:

“For the 2022 Annual Plan, HUD did not announce the entitlement allocations to states and local governments until May 13, 2022 due to a delay in Congress in passing an omnibus spending bill that funded the US Department of Housing and Urban Development. This is why the Annual plan process could not run concurrently with the City’s budget approval process. This year’s HUD Annual Plan is set for a 30 day comment period beginning May 23, 2022 and concluding June 22, 2022. City Council will hold a public hearing on June 6, 2022

and adopt a plan on June 20, 2022, with the plan submitted to HUD once the 30 day comment period is complete.”

Read more [here](https://www.roanokeva.gov/DocumentCenter/View/17508/2022-2023-City-HUD-Plan-Summary?bidId=) (<https://www.roanokeva.gov/DocumentCenter/View/17508/2022-2023-City-HUD-Plan-Summary?bidId=>).

Small Business Development Center (SBDC)

- During the pandemic period, the Roanoke Region Small Business Development Center (SBDC) reported its 2020 economic impact regional reach in the following ways:
- SBDC’s clients generated \$7b in local small business sales
- Helped access \$15m in new capital to help client businesses recover and grow • Create 145 new jobs
- 22 SBDC clients started businesses during the pandemic
- Demographics of SBDC advising clients:
 - 51% women
 - 18% minorities
 - 6% vets
 - 1722 total clients served in 2020

Although the SBDC does not have the funding for a separate Gainsboro Office at this time, they are committed to the neighborhood and supportive of the efforts of local leaders and

entrepreneurs who are doing a tremendous job organizing black-owned businesses. The SBDC has a minority business specialist; and they are open to holding meetings again in the Gainsboro neighborhood as well as provide support services to the community leadership to further support community vitality efforts. In addition to providing entrepreneurship development support, they are offering to provide record keeping and other administrative support services as needs arise. The SBDC is also connected to the Advancement Foundation and is willing to make a special Gainsboro push on the Gauntlet Program run by the Foundation. Read about SBDC services and resources [here](https://www.roanokesmallbusiness.org) (<https://www.roanokesmallbusiness.org>).

Total Action for Progress (TAP)

TAP helps people achieve economic and personal independence through education (all ages), employment training, financial services, affordable housing, domestic violence prevention, family services, and healthy environments.

According to reports, over the last 57 years TAP has:

- reached out annually to more than 5,000 low-income people to help them toward self-sufficiency through education and

- employment, housing, financial services, domestic violence prevention and assistance, and family services?
- provided a Head Start experience for more than 32,565 children
- helped 10,308 youth and adults to secure jobs
- provided remedial education opportunities for 7,505 youth and adults who had dropped out of school
- filed more than 3,500 tax returns free for low-income Virginians, helping them claim over \$2.6 million in Earned-Income Tax Credit
- kept over 8,000 families warm through weatherization services?
- providing close to 200 entrepreneurs with loans to start new local businesses. provide guidance, business start-up assistance, and loans through our Business Seed Capital, Inc. (BSCI) program
- started Legal Aid, the League of Older Americans (now the Local Office on Aging), RADAR, Southwest Virginia Second Harvest Food Bank (now Feeding Southwest Virginia), Project Discovery, Virginia CARES, and CHIP
- worked with the Northwest Neighborhood Improvement Council to start the Harrison Museum of African American Culture

- partnered with the Health Department and local neighborhood organizations to host local vaccination clinics, providing first-dose and booster shots to Roanoke citizens right in their neighborhoods
- partnered with state and local governments to provide more than 1,400 individuals in 450 households with rent relief services when the pandemic affected their income

Find more [here](https://tapintohope.org/2022/01/20/o) (<https://tapintohope.org/2022/01/20/o>).

An **urban enterprise zone** is an area where policies are implemented to encourage economic growth and development; and generally offer tax concessions, infrastructure incentives, and reduced regulations to attract investments and private companies in the zones.

There are enterprise zones in the Roanoke Region offering incentives for business locations, expansions, and development. Qualified businesses and/or property owners in a zone are eligible for state and local grants based on job creation and/or investment in real property. Refer to Roanoke Regional Partnership for requirements and incentives ([Link](#)).



Enterprise Zone, Gainsboro

Portions of each of the four subject areas of interest in this report falls within such a designated zone. See specific sections for precise locations.

Overview from Roanoke Regional Partnership site:

State Incentives

Two grant-based incentives are available from the Commonwealth of Virginia: job creation grants and real property investment grants.

Job Creation Grants are based on:

- Permanent full-time job creation over a four job threshold, exceeding wage thresholds and making health benefits available.
- The amount of the grant will be based on the wages paid for grant-eligible positions in eligible industries.

[Link](https://roanoke.org/wp-content/uploads/2019/07/JCG-Fact-Sheet.pdf) (<https://roanoke.org/wp-content/uploads/2019/07/JCG-Fact-Sheet.pdf>)

Real Property Investment Grants are based on:

- Investments made to a commercial, industrial, or mixed-use building or facility;
- An investment greater than \$100,000 for rehabilitation projects. Grants issued for up to 20 percent of anything spent in excess of \$100,000.
- An investment of greater than \$500,000 for new construction. Grants issued for up to 20 percent of anything spent in excess of \$500,000.
- Grants capped at \$100,000 per building or facility for investments less than \$5 million, and \$200,000 for investments of \$5 million or more.

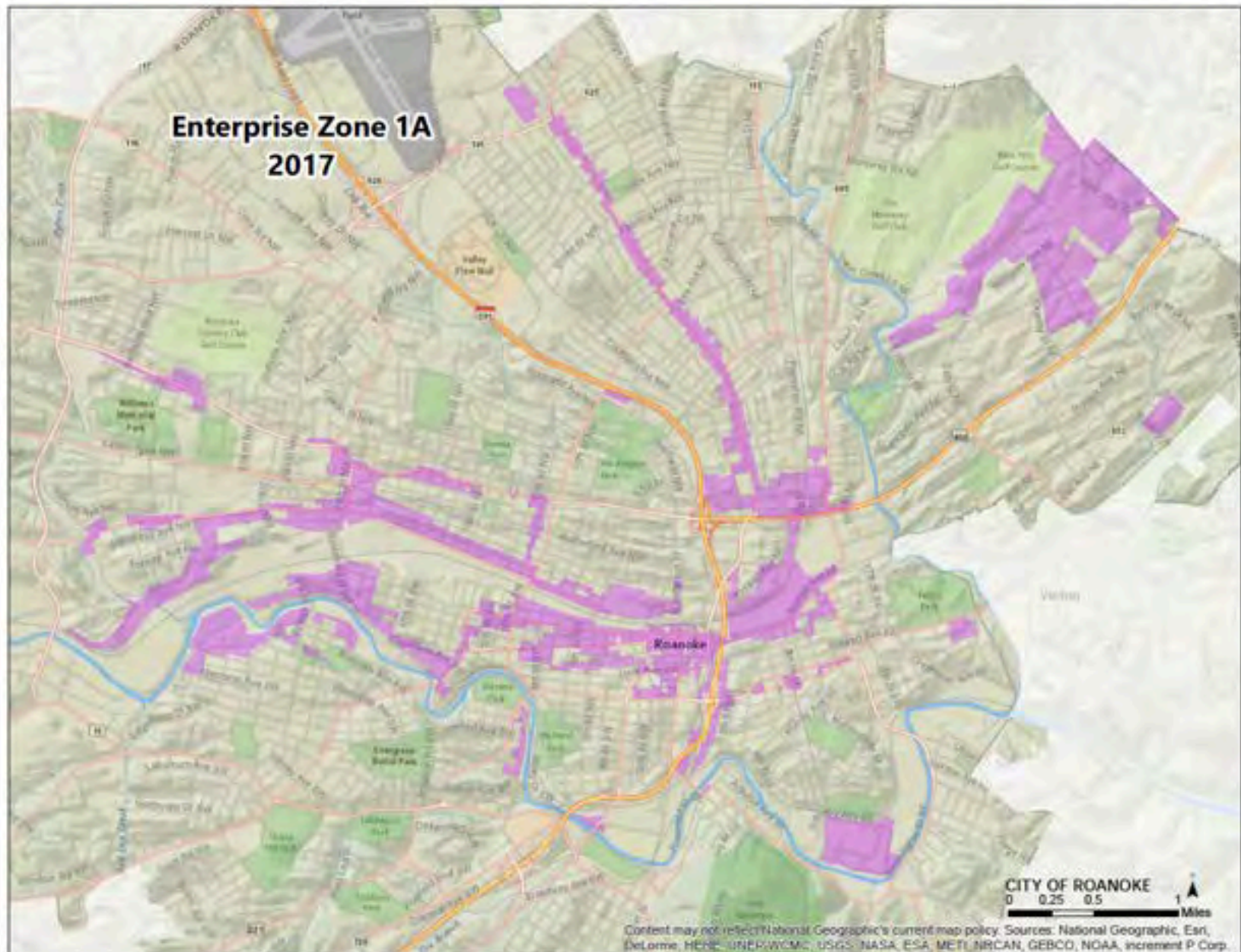
[Link](https://roanoke.org/wp-content/uploads/2019/07/RPIG-Fact-Sheet.pdf) (<https://roanoke.org/wp-content/uploads/2019/07/RPIG-Fact-Sheet.pdf>)

Local Incentives

City of Roanoke Enterprise Zone

- **Job Grants:** Businesses taking advantage of job training assistance from the Virginia Department of Business Assistance also may be eligible for job training grants from the City of Roanoke.
- **Partial Real Estate Tax Exemption of Rehabilitated Buildings:** Available when rehabilitation increases the assessed value of an existing commercial, industrial or commercial mixed-use property.
- **Facade Grant Program:** Rebates one-third of the cost of façade renovations up to \$25,000.
- **Development Fees Rebates:** Available in proportion to the amount of investment.
- **Water, Fire, Sewer Hookup Fees Rebates:** Based on the amount of overall investment.
- **Business Security Grant:** By participating in the Roanoke Police Department Star City Business Watch program, businesses may receive up to \$500 to incorporate police-recommended security measures.
- **Neighborhood and Parks Grant:** Available to neighborhood organizations for improving gateway features, signage, or overall beautification efforts.

[Link](https://www.bizroanoke.com/wp-content/uploads/2019/03/Enterprise-Zone-One-A-Application-Packet-2019.pdf) (<https://www.bizroanoke.com/wp-content/uploads/2019/03/Enterprise-Zone-One-A-Application-Packet-2019.pdf>)



The City of Roanoke established Conservation and Rehabilitation Zones to encourage the preservation and improvement of properties within these districts.

Of the two designations, the conservation districts are comprised of older properties and contain all of the local historic districts and most of the national register districts within the City. Partial tax exemption is one of the incentives that is allowed in these districts that are in need of investment, revitalization and stability.

For more information, see [Link](https://law.lis.virginia.gov/vacode/title58.1/chapter32/section58.1-3219.4/) (https://law.lis.virginia.gov/vacode/title58.1/chapter32/section58.1-3219.4/).

Neighborhood Conservation

A future land use area where established single-family neighborhoods are delineated and the conservation of the existing development pattern is encouraged.

Land Use Types

- **Neighborhood Commercial** - Low impact services to serve the local neighborhood that are consistent with the Community Plan design guidelines.
- **Neighborhood Institutional Centers** - Uses that serve the neighborhood residents including parks, schools, religious assembly facilities, recreational and park facilities, community meeting areas and clubs. These

facilities should be linked to the residential areas by greenways, bike trails and pedestrian paths.

- **Single-Family Residential** - Attached and detached housing at a reasonable density that is not significantly higher than the existing neighborhood. Infill lots or community redevelopment should be designed to be sensitive to the surrounding neighborhood but can be at reasonably higher density. New single-family residential developments should incorporate greenways and bike and pedestrian trails. Cluster developments are encouraged.

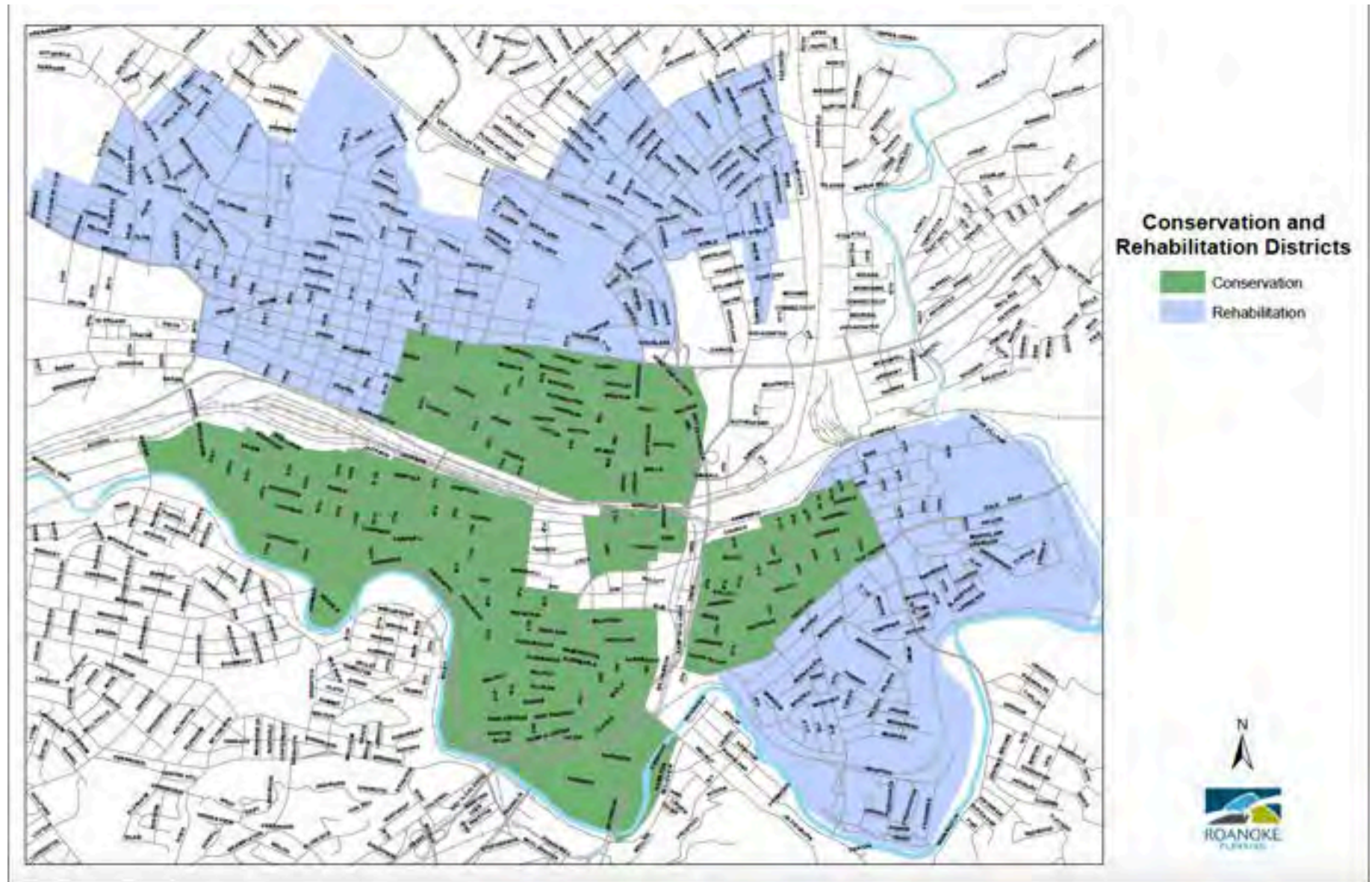
Land Use Determinants

- **Access** - Locations served by a local street system.
- **Existing Land Use Pattern** - Locations where limited density residential subdivisions have been platted and developed.
- **Existing Zoning** - Locations where limited density residential zoning has been established.
- **Expansion Areas** - Locations where the expansion of the existing development pattern is logical.
- **Infill Development** - Locations where infill areas complement the surrounding development pattern.
- **Urban Sector** - Locations served by urban services.

Source (<https://www.roanokecountyva.gov/1949/Neighborhood-Conservation>)

Neighborhood Rehabilitation

~ Pending additional information from the City ~



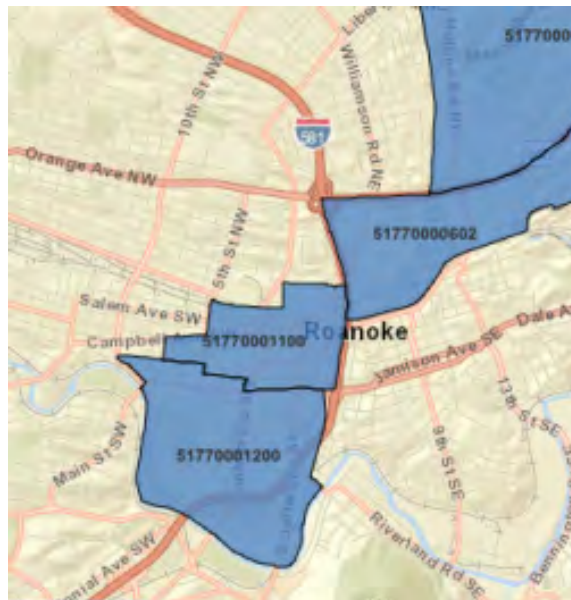
OPPORTUNITY ZONES

An Opportunity Zone is a designation and investment program created by the Tax Cuts and Jobs Act of 2017 allowing for certain investments in lower income areas to have tax advantages.

According to the Roanoke Regional Partnership: Through the federal Opportunity Zone program, banks, communities, investors, companies, and others may create Opportunity Funds to direct tax-advantaged investments to one of several opportunity zones in the Roanoke Region of Virginia.

- The primary benefit of investing in an Opportunity Fund is a temporary deferral of capital gains taxes until December 31, 2026, as long as the Opportunity Zone investment is maintained until that date.
- Secondly, there is a step-up in basis for capital gains reinvested in an Opportunity Fund. The basis is increased by 10 percent if investment in the Opportunity Fund is held by the taxpayer for at least five years and an additional 5 percent if held for at least seven years.
- Lastly, a permanent exclusion of capital gains from the sale or exchange of an investment in an Opportunity Fund applies if the investment is held for at least 10 years.

At present, none of the four subject areas of interest in this report falls within such a designated zone; although West End and 9th street lay either side of the Downtown District and the Innovation Corridor.



Roanoke Region Opportunity Zones

[Link](https://roanoke.org/real-estate/opportunity-zones-in-the-roanoke-region-of-virginia/) (https://roanoke.org/real-estate/opportunity-zones-in-the-roanoke-region-of-virginia/)



Top: Opportunity Zone: Downtown District
Bottom: Opportunity Zone: Innovation District



DEQ | Virginia Department of Environmental Quality - Brownfields are properties in which redevelopment or reuse is complicated by the presence of hazardous materials, pollution, or contaminants. For more information, Link: <https://www.deq.virginia.gov/land-waste/land-remediation/brownfields>

VEDP | Virginia Economic Development Partnership - Virginia Brownfields Restoration and Economic Redevelopment Assistance Fund (VBAF). For more information, Link: <https://www.vedp.org/brownfields>

EPA | Environmental Protection Agency - A Guide to Federal Tax Incentives for Brownfields Redevelopment https://www.epa.gov/sites/default/files/2014-08/documents/tax_guide.pdf

For additional resources: See Smart Growth and Placemaking Sections

Smart Growth strategies and resources help communities grow in equitable ways that expand economic opportunity for individuals, organizations and governing authorities while protecting human health and the environment. Smart Growth strategies support activities that improve the quality of development; especially in overburdened, underserved and marginalized communities of physical and economic disparity.

Over the years, **Infill Development** has become an increasingly popular “smart” way to grow as developers seek opportunities with lower barriers to entry (better land acquisition and condition, reduced infrastructure costs, access to capital and financing, higher ROI, etc) AND consumers - - residents and business owners - - seek affordable, safe and walkable communities in the vicinity of where they live, work and play.

Link: <https://www.epa.gov/smartgrowth/smart-growth-and-economic-success-investing-infill-development>

Resource: *Smart Growth and Economic Success: Investing in Infill Development* ([Link](#))

Ten basic principles:

1. Mix land uses
2. Take advantage of compact building design
3. Create a range of housing opportunities and choices
4. Create walkable neighborhoods
5. Foster distinctive, attractive communities with a strong sense of place

6. Preserve open space, farmland, natural beauty, and critical environmental areas
7. Strengthen and direct development towards existing communities
8. Provide a variety of transportation choices
9. Make development decisions predictable, fair, and cost effective
10. Encourage community and stakeholder collaboration in development decisions

While some grant funding is periodically available through the Environmental Protection Agency (EPA), they also provide valuable tips and resources that have meaningful economic impact for cities and the citizens they serve. They also address issues of “Environmental Equity” and other issues of social justice. For lists of funding resources for tribal, state, and local governments; communities; and non-governmental organizations that are seeking funding to address various aspects of community revitalization and smart growth,

For more information, Link: <https://www.epa.gov/smartgrowth/epa-smart-growth-grants-and-other-funding>

Additional Smart Growth funding opportunities through the National Association of Realtors include:

Smart Growth Grant Activities

Supports land-use and transportation-related activities that have an impact on public policies that support one or more of the 10 Smart Growth Principles.

Level 1 Activities



Smart Growth Class: Host NAR's Smart Growth for the 21st Century Class or other course focusing on Smart Growth and/or Land Use, Development and Growth.



Expert Speaker: Bring in a speaker who can address specific growth and land use issues impacting your community.



Placemaking Training: Host an event to bring in a speaker to discuss Placemaking or give a training on how to initiate a placemaking project.

Level 2 Activities



Visioning & Planning: Bring in a consultant to conduct a charette, Better Block, Main Street Analysis, Walkable Community Workshop/Audit, Placemaking Visioning Session.



Studies & Reports: Partner with an expert to conduct a Market Analysis, Land Use Analysis, Feasibility Study, etc.

Level 2 Activities



Land Use/Community Plans: Work with an expert to develop or updated a general, master, comprehensive, land use, park/open space, or bicycle/pedestrian, plan.



Policies/Ordinances/Legislation: Contribute to the development of new or updates policies, ordinances or legislation impacting land use, development and other Smart Growth tenets.



Conferences & Forums – support and engage in a conference or event that focuses on growth and development and Smart Growth issues.

Level 3 Activities



Approved activities must be comprehensive, have a broad community reach, significant REALTOR® involvement, and must include working with at least one non-REALTOR® partner organization.

For additional information, see [Link](https://realtorparty.realtor/community-outreach/smart-growth/grant-ideas) (https://realtorparty.realtor/community-outreach/smart-growth/grant-ideas).

Cultural Arts and Placemaking can transform communities and powerfully influence economies beyond what bricks and mortar can achieve. Here are a few sources to incent community investment and improvements.

PPS | Project for Public Spaces

PPS has developed **The Power of 10+** to evaluate and facilitate Placemaking to show how paying attention to the human experience when building a city's destinations and districts can have immediate and widespread impacts.

"The idea behind this concept is that places thrive when users have a range of reasons (10+) to be there. These might include a place to sit, playgrounds to enjoy, art to touch, music to hear, food to eat, history to experience, and people to meet. Ideally, some of these activities will be unique to that particular place, reflecting the culture and history of the surrounding community. Local residents who use this space most regularly will be the best source of ideas for which uses will work best."

Place design, or the lack thereof, has a powerful impact on a community and its economy. For more ideas, resources and grant opportunities, see [Link](https://www.pps.org/community-placemaking-grants) (https://www.pps.org/community-placemaking-grants).

LISC | Creative Placemaking

LISC (Local Initiative Support Corporation) works with area residents and partners to create resilient and inclusive communities of opportunity. In partnership with the National Endowment for the Arts (NEA), LISC has implemented **Creative Placemaking** - - where "the arts, culture, and design can be leveraged to spark dialogue, promote economic development, and catalyze the systemic changes social change our communities need to prosper. " Creative Placemaking is an iterative process of "design thinking" that involves: GATHER, IMAGINE, DISCOVER, DESIGN & REFINE, ACTION, RESULTS, and RENEW.

For funding support, fellowships, grants and other resources, see [Link](https://www.lisc.org/our-initiatives/creative-placemaking/main/creative-placemaking-toolkit/funding/) (https://www.lisc.org/our-initiatives/creative-placemaking/main/creative-placemaking-toolkit/funding/).

NAR | National Association of Realtors

Outreach Placemaking Grants fund state and local REALTOR® association projects that create new, outdoor public spaces and destinations in a community on unused or underused sites. Examples of funded projects include: Parklets, Pocket Parks, Ally Activities, Trails & Pedestrian Paths, Community Gardens, Playgrounds & Fitness Areas, and Dog Parks.

For more information, see [Link](https://www.nar.realtor/grants/placemaking-grant) (https://www.nar.realtor/grants/placemaking-grant AND https://realtorparty.realtor/community-outreach/placemaking#:~:text=Placemaking%20Grants%20fund%20state%20and,on%20unused%20or%20underused%20sites).

NEA | National Endowment for the Arts

OUR TOWN is NEA's creative placemaking project-based funding program that requires a partnership between a local government entity and nonprofit organization, one of which must be a cultural organization; and should engage in partnership with other sectors (e.g., agriculture and food, economic development, education and youth, environment and energy, health, housing, public safety, transportation, workforce development). Projects must demonstrate a specific role for arts, culture, and design as a part of strategies that strengthen communities by advancing local economic, physical, and/or social outcomes with evidence of change.

Grants range from \$25,000 to \$150,000, with a minimum cost share/match equal to the grant amount.

For more information, see [Link](https://www.arts.gov/grants/our-town/program-description) (https://www.arts.gov/grants/our-town/program-description)

AARP | Community Challenge

“Livable Communities” are Age-Friendly
Approximately 45 million Americans are age 65 or older. By 2030, that number will reach 73 million Americans. At that point, fully one in five Americans will be older than 65. By 2034, the United States will — for the first time ever — be a country comprised of more older adults than of children. AARP Livable Communities supports the efforts of neighborhoods, towns, cities and rural areas to be great places for people of all ages. We believe that communities should provide safe, walkable streets; age-friendly housing and transportation options; access to needed services; and opportunities for residents of all ages to participate in community life.

For additional information and funding requirements, see [Link](https://www.aarp.org/livable-communities/about/info-2017/aarp-community-challenge.html) (https://www.aarp.org/livable-communities/about/info-2017/aarp-community-challenge.html)

IOBY | In Our Backyard

A crowd-resourcing platform for community projects.

IOBY connects leaders with funding and support to make neighborhoods safer, greener, more livable and more fun. IOBY believes that it should be easy to make meaningful change “in our backyards” – the

positive opposite of NIMBY. This gives everyone the ability to organize all kinds of capital—cash, social networks, in-kind donations, volunteer time, advocacy—from within the neighborhood to make the neighborhood a better place to live.

For additional information and funding requirements, see [Link](https://ioby.org/):(https://ioby.org/)

AMP | Levitt Pavilions

The Levitt Foundation exists to strengthen the social fabric of America, believing thriving public spaces are key to healthy communities. Building community with performing arts
Levitt is passionate about reinvigorating America’s public spaces through creative placemaking and creating opportunities for everyone to experience the performing arts. They believe the world needs more “third places”, guiding their community-driven efforts.

Levitt Pavilions invests in community-driven efforts that harness the power of partnership and leverage community support for creative placemaking that reimagines challenged public spaces—neglected parks, vacant downtown lots, former brownfields—into vibrant, music-filled community hubs. Primary funding areas include Levitt venues and the Levitt AMP [Your

City] Grant Awards. Both of these programs embody our funding philosophy and exemplify Levitt core values to support projects that are catalytic and dynamic and promote joy, inclusivity and connectedness.

For additional information and funding requirements, Link: <https://levitt.org/what-we-fund/>

KABOOM!

Committed to ending Playscape Inequity, KABOOM envisions communities with ample opportunities for young people to play and learn. To make this vision a reality, KaBoom! provides grants of accessible playscapes (play grounds, adventure courses, multi-sport courts) and equipment to placemakers—maintaining a particular focus on applicants in low-income or disaster-affected communities, or serving special needs children.

For additional information and funding requirements, Link: <https://kaboom.org/grants>

KRESGE FOUNDATION | ARTS AND CULTURE PROGRAM

The Kresge Foundation is a private, national foundation that works to expand opportunities in America’s cities through grantmaking and social investing in arts and culture, education, environment, health, human services and

community development. In collaboration with partners, they help create pathways for people with low incomes to improve their life circumstances and join the economic mainstream.

Kresge's American Cities Program supports the transformation of cities with on-the-ground community development practices advancing opportunity for access to quality, affordable housing; vibrant, connected neighborhoods; meaningful workforce preparation and employment opportunities; and reliable public transit. For more information, Link: <https://kresge.org/our-work/american-cities/>

Kresge's Environment Program helps cities combat and adapt to climate change while advancing racial and economic equity. For more information, Link: <https://kresge.org/our-work/environment/> and <https://kresge.org/our-work/environment/#funding>

Kresge's Equitable Creative Placemaking
The Kresge Foundation sees art and culture as no less than "drivers of more just communities."

Kresge has multiple funding opportunities for placemakers using the arts as a tool for more equitable communities: a grant focused on creative placemaking for healthy and inclusive

communities; as well as a grant to strengthen the narrative around equity as part of the practice of creative placemaking. By inviting applicants who combine art-forward approaches with the recognition of complex community histories and structural inequality, Kresge's funding opportunities support a truly transformative approach to creative placemaking. For more information, Link: <https://kresge.org/our-work/arts-culture/love-your-block-cities-of-service>
LOVE YOUR BLOCK, CITIES OF SERVICE
Helping City Leaders engage their citizens to build stronger communities.

Using a uniquely municipality-led approach to placemaking partnerships, the Cities of Service Love Your Block program drives collective problem-solving and civic engagement at the local scale. In this program, Cities of Service equips city officials with the tools they need to engage with placemakers and create "mini-grant" opportunities that lead to sustained, "volunteer-fueled" impact. By supporting city leaders through an inclusive placemaking process, the program supports local stewardship and offers city officials new opportunities for the type of deep listening needed to enhance social equity through public spaces. For more information, Link: <https://citiesofservice.jhu.edu/>

NATIONAL MAIN STREET CENTER

Aimed at transforming Main Streets to "revive local economies, bring communities together, and forge the future for cities and towns across the country." National Main Street Center is also a funding partner, backing cross-cutting projects through grants like the Future of Shopping Small Grant Program. For more information, Link: <https://www.mainstreet.org/home>

PARTNERS FOR PLACES, FUNDERS' NETWORK
Partners for Places is a matching grant program administered by the Funders' Network, aimed at forging new partnerships through community projects that promote environmental sustainability, health, and a strong local economy. The network's curated lists of past projects highlight sustainability-focused initiatives that often intersect with public space projects, among other focus areas. By building partnerships between local government sustainability leaders and place-based foundations, the matching grant program creates vital links at the community level, strengthening collaboration between national funders and local stakeholders and organizations. For more information, Link: <https://www.fundersnetwork.org/partners-for-places/>

THE J.W. McCONNELL Family Foundation

Cities for People: Empowering nonprofits around Canada to explore key themes around city-building

Cities for People is an initiative with the core proposition that cities can be made more resilient and livable through innovation networks. By linking local efforts across the country with those taking place in other parts of the world, a culture of continuous social innovation and deeper collaboration can be fostered. For more information, Link: <https://mcconnellfoundation.ca/initiative/cities-for-people/>

KNIGHT FOUNDATION

Knight Cities Challenge: “Idea” grants at all levels, block, neighborhood, and city

The Knight Cities Challenge seeks new ideas from innovators who will take hold of the future of our cities. Applicants simply must submit ideas for making the 26 Knight communities more vibrant places to live and work at the city, neighborhood and block levels, and all sizes in between. For more information, Link: <https://knightfoundation.org/challenges/knight-cities-challenge>

SOUTHWEST AIRLINES

Heart of the Community: Funding a movement through local projects

The Southwest Airlines Heart of the Community program was developed to support and activate public spaces in the heart of cities. Southwest Airlines is committed to leveraging the power of Placemaking to strengthen connections between people and the places they share and to spark social, economic, and environmental benefits in communities across the country. For more information, Link: <https://www.pps.org/projects/heart-of-the-community-grants-program>

CALGARY FOUNDATION

Neighborhood Grants: Grassroots grants up to \$5,000 supporting resident-led projects

Neighbour Grants is the Calgary Foundation’s original grassroots granting program, offering grants since 1999 with five cycles each year. The program has helped people do many different things, such as build a community garden at their local park, gather to celebrate the artistic talents of local youth, create a traffic-calming pavement painting in front of their school, engage their cultural community in creative ways to address community priorities, and develop a community plan to guide neighborhood redevelopment. For more information, Link: <https://calgaryfoundation.org/grantsawards-loans/types-of-grants/community-grants/>

APPENDIX A

Tapestry Segmentation Profiles



LifeMode Group: Hometown

Modest Income Homes

12D

Households: 1,627,600

Average Household Size: 2.56

Median Age: 37.0

Median Household Income: \$23,900

WHO ARE WE?

Families in this urban segment may be nontraditional; however, their religious faith and family values guide their modest lifestyles. Many residents are primary caregivers to their elderly family members. Jobs are not always easy to come by, but wages and salary income are the main sources of income for most households. Reliance on Social Security and public assistance income is necessary to support single-parent and multigenerational families. Rents are relatively low (Index 70), public transportation is available, and Medicaid assists families in need.

OUR NEIGHBORHOOD

- Households are single person or single parent (usually female householders). Multigenerational families are also present.
- Homes are predominantly single family; values reflect the age of the housing, built more than 60 years ago.
- Over half of the homes are renter occupied; average rent is lower than the US average.
- Most households have one car (or no vehicle); nearly a third rely on carpooling, walking, biking, or public transportation.

SOCIOECONOMIC TRAITS

- Almost a quarter of adults aged 25 or more have no high school diploma.
- Labor force participation is 50%.
- Income is less than half of the US median income.
- Consumers in this market consider traditional gender roles and religious faith very important.
- This market lives for today, choosing to save only for a specific purpose.
- Consumers favor TV as their media of choice and will purchase a product with a celebrity endorsement.



LifeMode Group: Hometown

Modest Income Homes

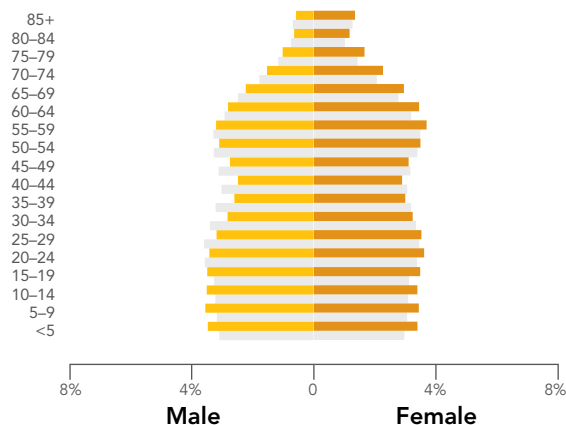


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AGE BY SEX (Esri data)

Median Age: **37.0** US: 38.2

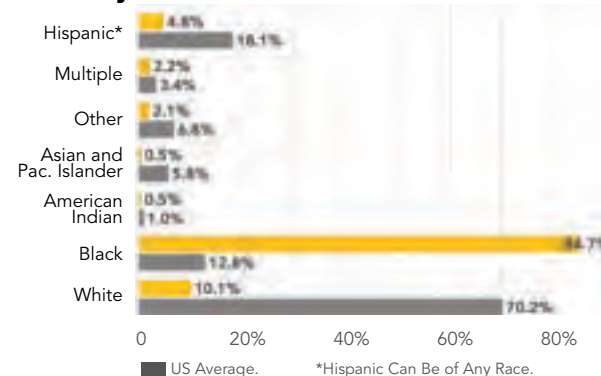
■ Indicates US



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: **34.0** US: 64.0



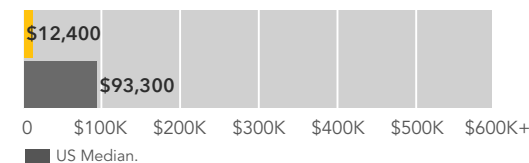
INCOME AND NET WORTH

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

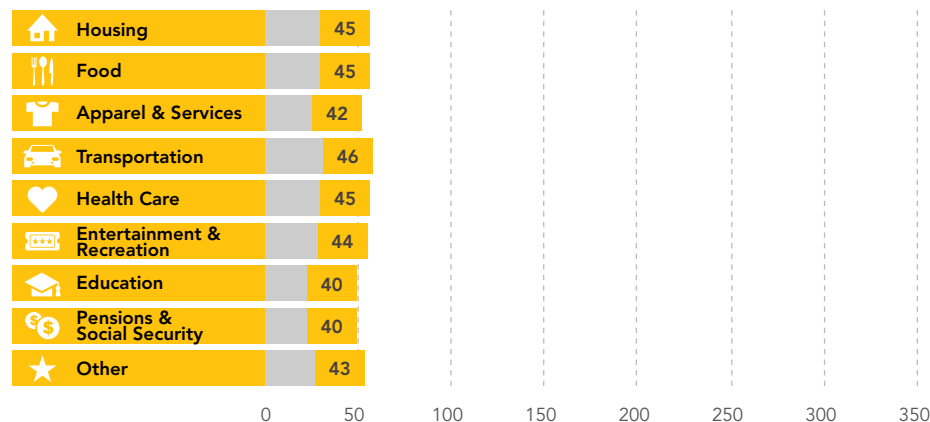


Median Net Worth



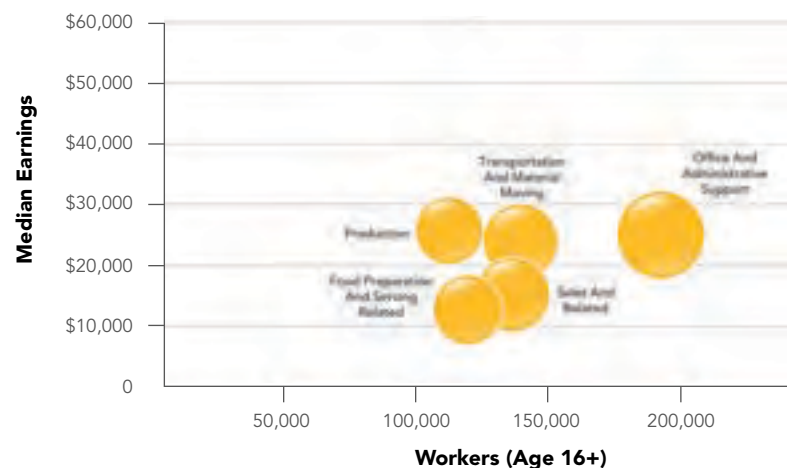
AVERAGE HOUSEHOLD BUDGET INDEX

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.





LifeMode Group: Hometown

Modest Income Homes



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MARKET PROFILE

(Consumer preferences are estimated from data by MRI-Simmons.)

- Consumers shop at warehouse clubs and low-cost retailers.
- Unlikely to own a credit card, pay bills in person.
- This market supports multigenerational families, often primary caregivers for elderly family members.
- Listen to gospel and R&B music and prefer to watch BET.
- Enjoy playing and watching basketball.

HOUSING

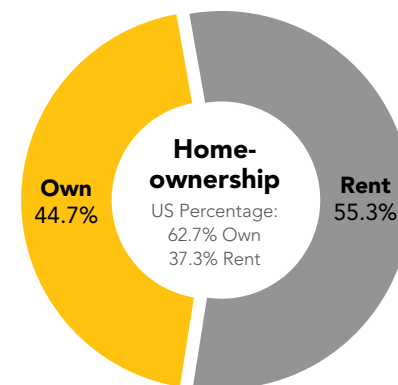
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

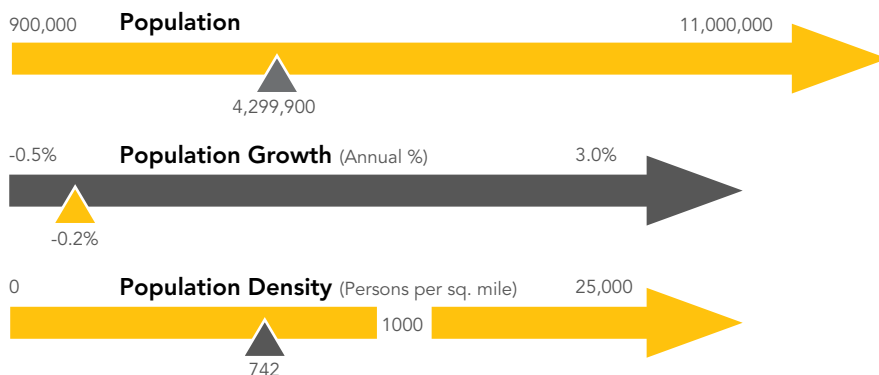
Average Rent:
\$723

US Average: \$1,038



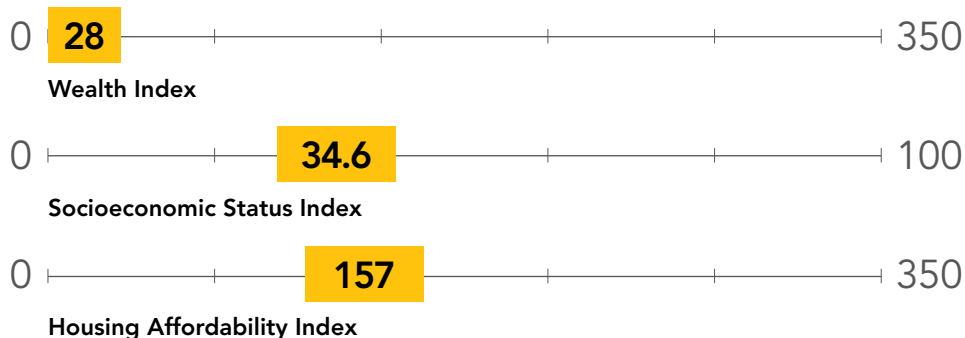
POPULATION CHARACTERISTICS

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.





LifeMode Group: Hometown

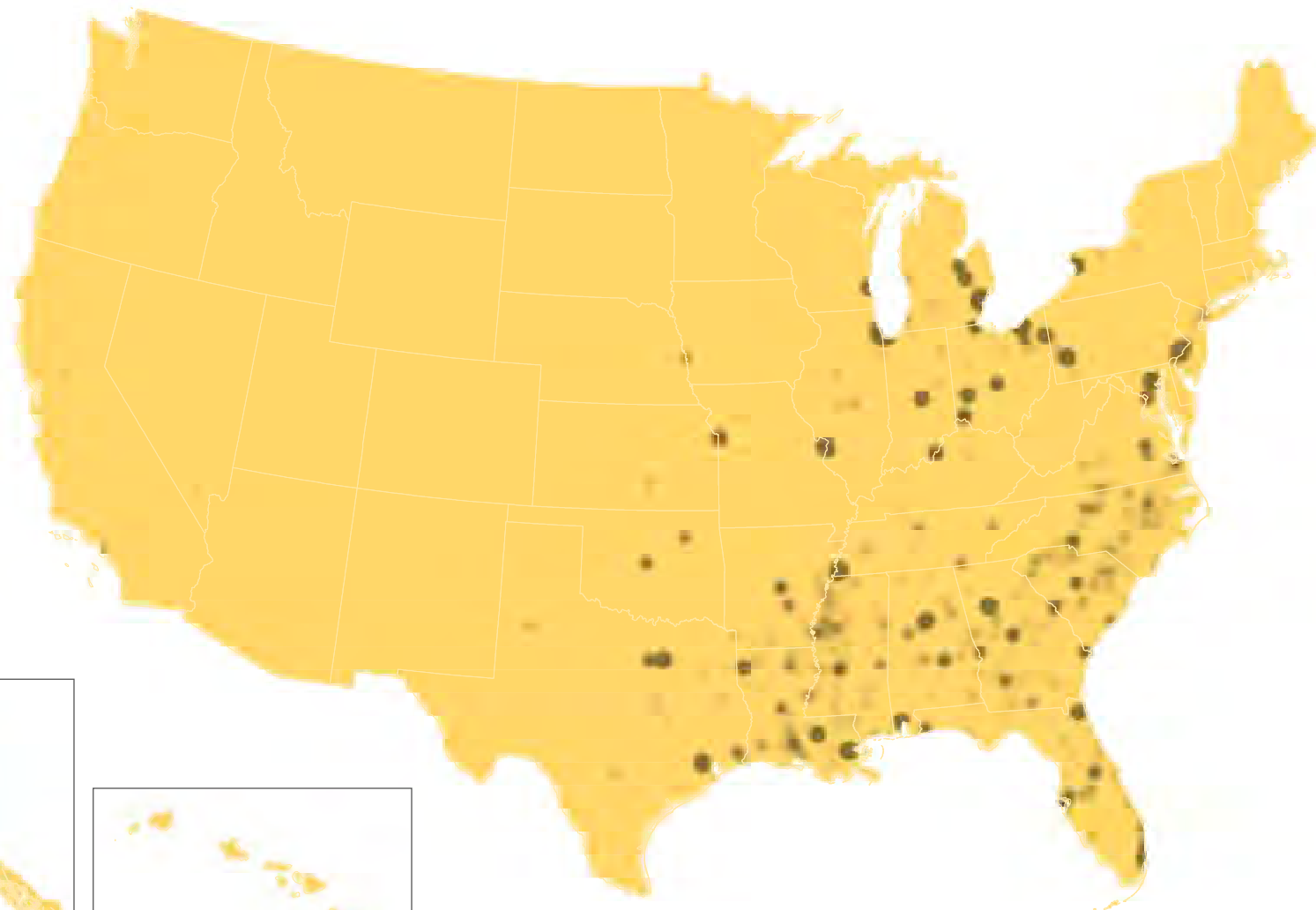
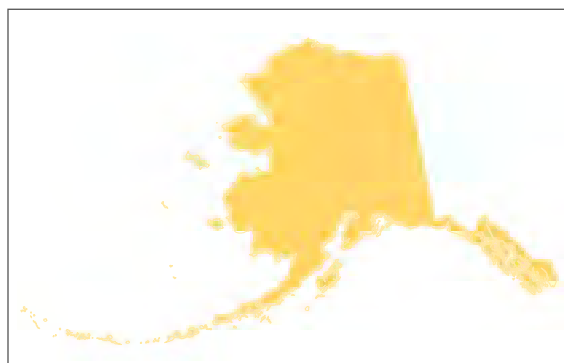
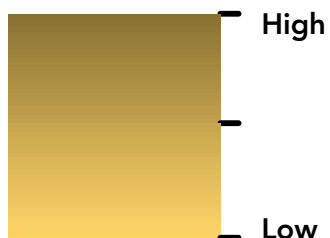
Modest Income Homes



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SEGMENT DENSITY

This map illustrates the density and distribution of the *Modest Income Homes* 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 is lower than the US (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

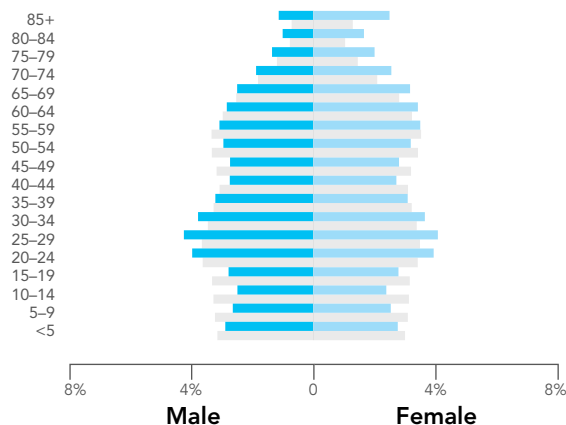
- An average labor force participation rate of 62.6%, despite the increasing number of retired workers.
- 32% of households are currently receiving income from Social Security.
- 31% have a college degree (Index 99), 33% have some college education (Index 114), 9% are still enrolled in college (Index 121).
- Consumers are price aware and coupon clippers but open to impulse buys.
- They are attentive to environmental concerns.
- They are comfortable with the latest technology.



AGE BY SEX (Esri data)

Median Age: **39.4** US: 38.2

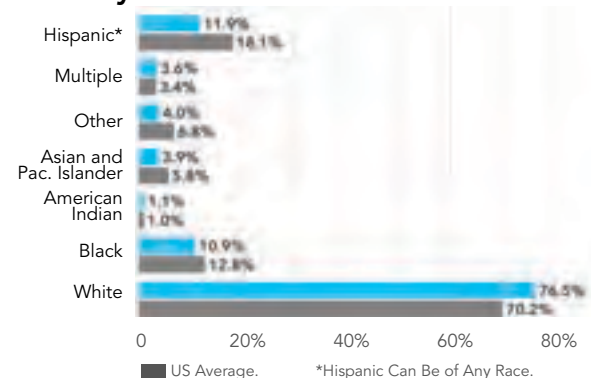
■ Indicates US



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



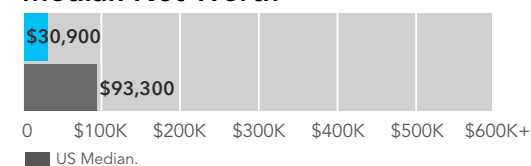
INCOME AND NET WORTH

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

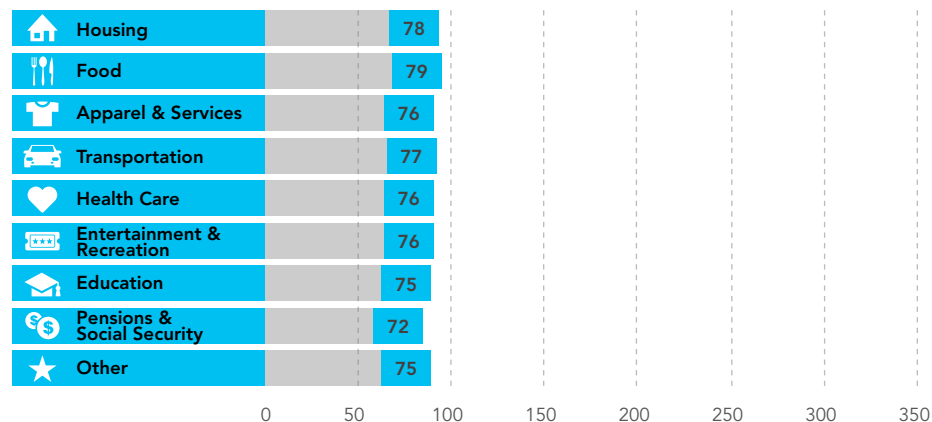


Median Net Worth



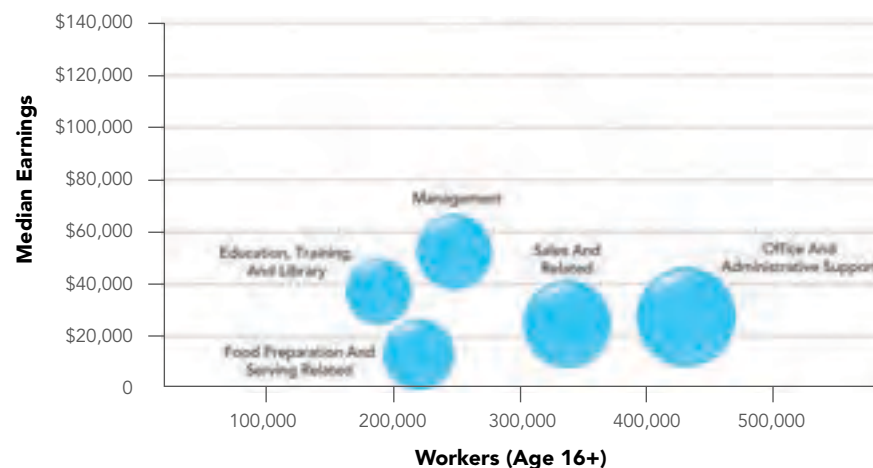
AVERAGE HOUSEHOLD BUDGET INDEX

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 MRI-Simmons.)

- Residents have a strong sense of community. They volunteer for charities, help fundraise, 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.



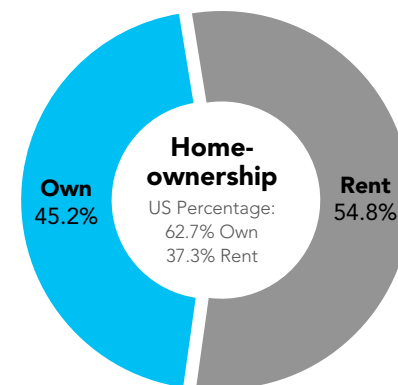
Typical Housing:

Single Family;
Multi-Units

Average Rent:

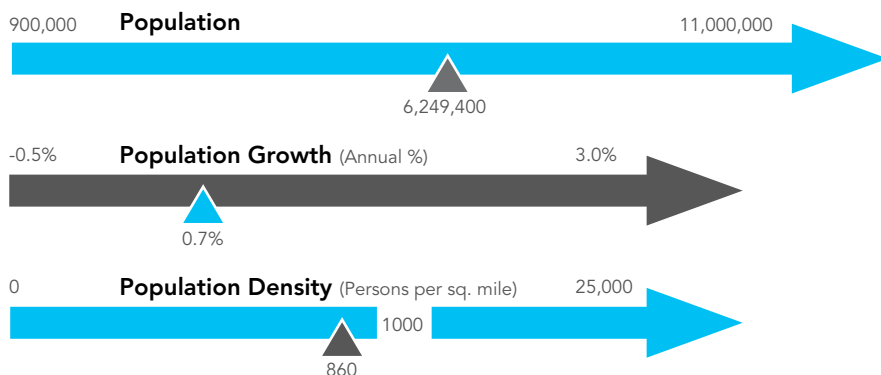
\$880

US Average: \$1,038



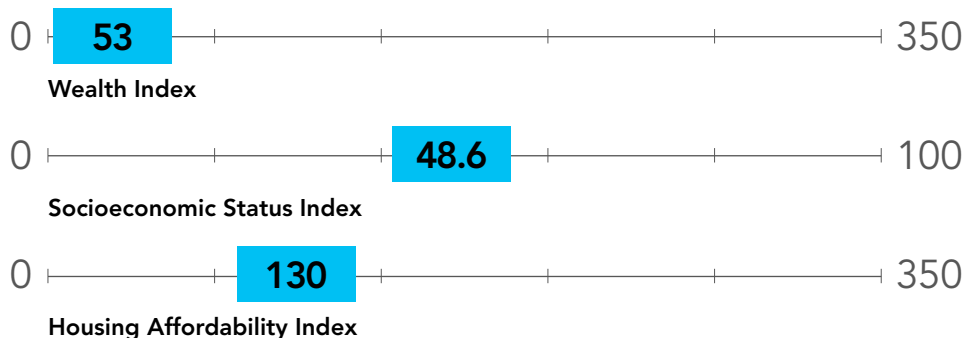
POPULATION CHARACTERISTICS

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

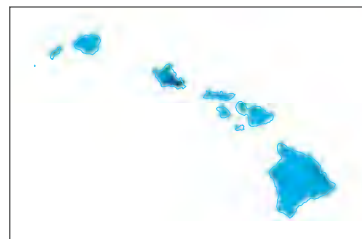
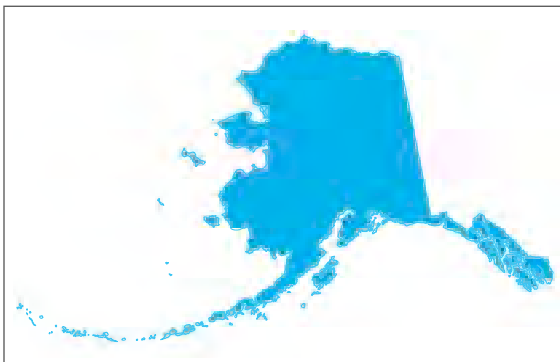
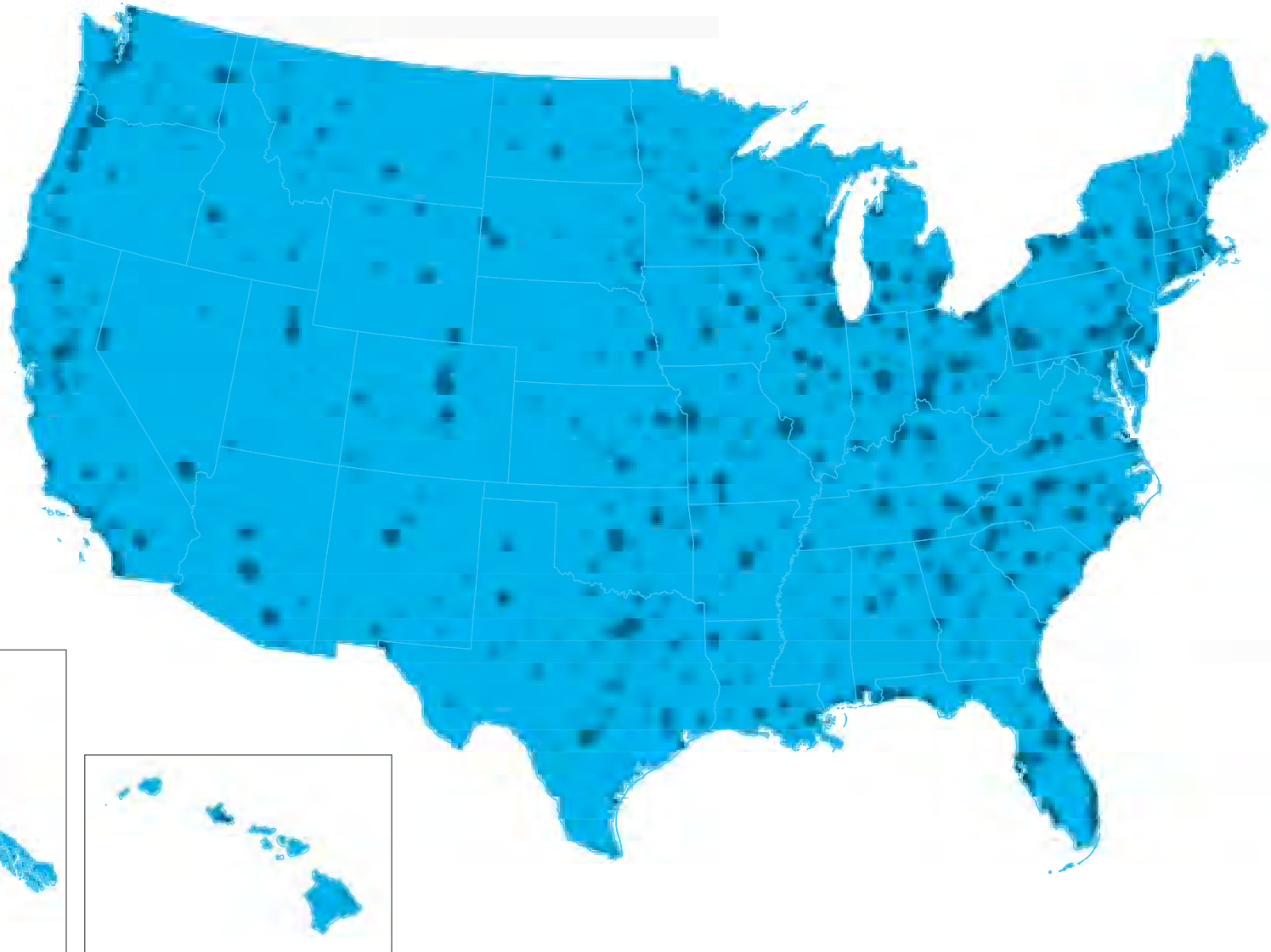
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

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





LifeMode Group: Hometown

Small Town Sincerity

12C

Households: 2,305,700

Average Household Size: 2.26

Median Age: 40.8

Median Household Income: \$31,500

WHO ARE WE?

Small Town Sincerity includes young families and senior householders that are bound by community ties. The lifestyle is down-to-earth and semirural, with television for entertainment and news, and emphasis on convenience for both young parents and senior citizens. Residents embark on pursuits including online computer games, renting movies, indoor gardening, and rural activities like hunting and fishing. Residents keep their finances simple—paying bills in person and avoiding debt.

OUR NEIGHBORHOOD

- Reside in small towns or semirural neighborhoods, mostly outside metropolitan areas.
- Homes are a mix of older single-family houses (61%), apartments, and mobile homes.
- Half of all homes are owner occupied (Index 79).
- Median home value of \$92,300 is about half the US median.
- Average rent is \$639 (Index 62).
- This is an older market, with half of the householders aged 55 years or older and predominantly single-person households (Index 139).

SOCIOECONOMIC TRAITS

- Education: 67% with high school diploma or some college.
- Labor force participation lower at 52% (Index 83), which could result from lack of jobs or retirement.
- Income from wages and salaries (Index 83), Social Security (Index 133) or retirement (Index 106), increased by Supplemental Security Income (Index 183).
- Price-conscious consumers that shop accordingly, with coupons at discount centers.
- Connected, but not to the latest or greatest gadgets; keep their landlines.
- Community-oriented residents; more conservative than middle of the road.
- Rely on television or newspapers to stay informed.



LifeMode Group: Hometown

Small Town Sincerity

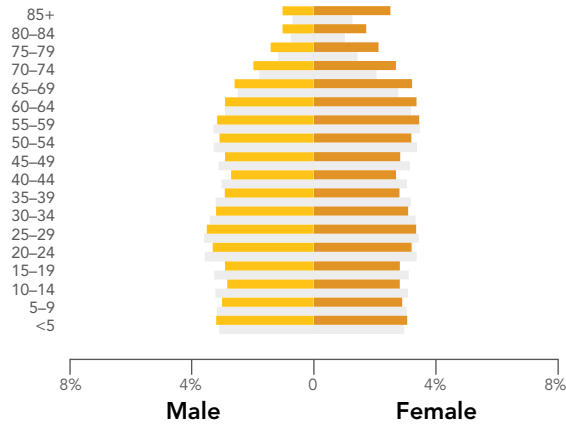


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AGE BY SEX (Esri data)

Median Age: **40.8** US: 38.2

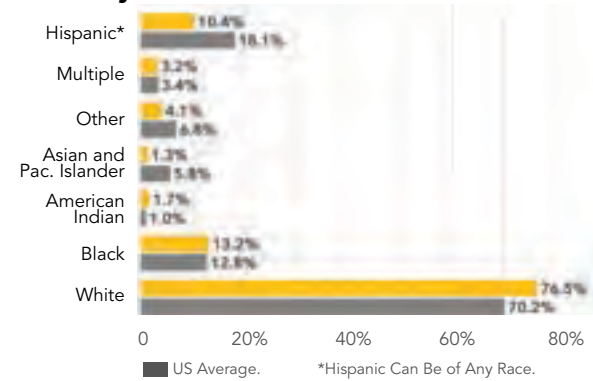
■ Indicates US



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: **51.0** US: 64.0



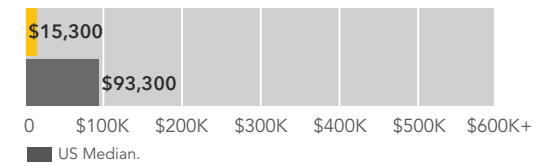
INCOME AND NET WORTH

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

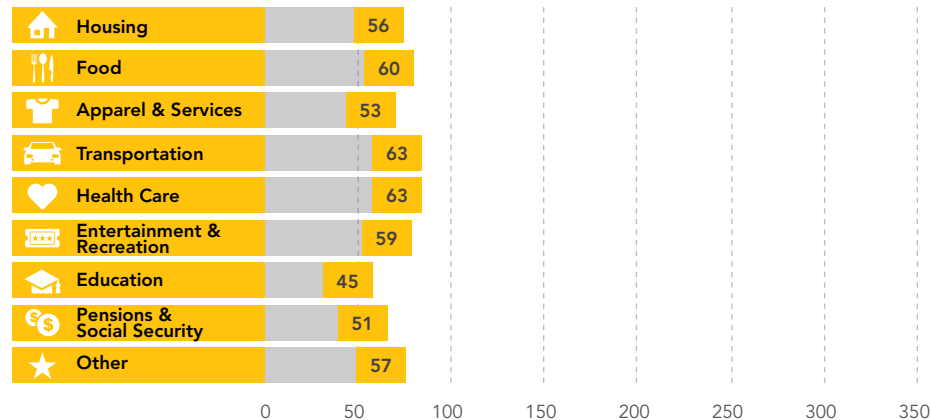


Median Net Worth



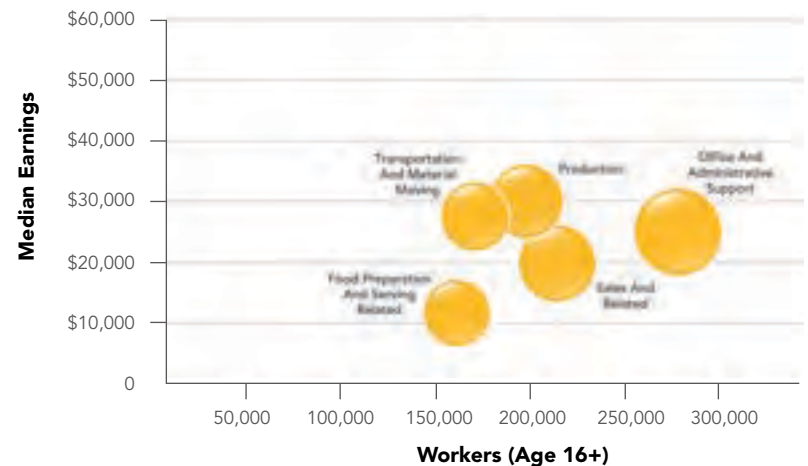
AVERAGE HOUSEHOLD BUDGET INDEX

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.





LifeMode Group: Hometown

Small Town Sincerity



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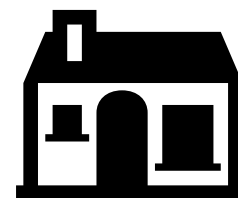
MARKET PROFILE

(Consumer preferences are estimated from data by MRI-Simmons.)

- Small Town Sincerity features a semirural lifestyle, complete with domestic trucks and SUVs, ATVs, and vegetable gardens.
- Residents enjoy outdoor activities like hunting and fishing as well as watching NASCAR and college football and basketball on TV.
- A large senior population visit doctors and health practitioners regularly.
- A largely single population favors convenience over cooking—frozen meals and fast food.
- Home improvement is not a priority, but vehicle maintenance is.

HOUSING

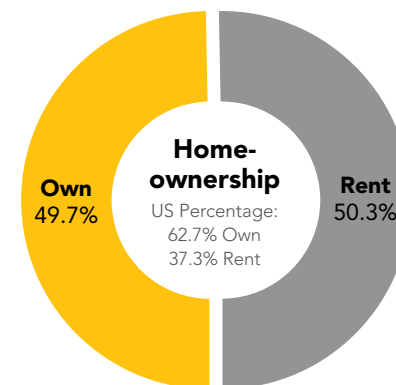
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

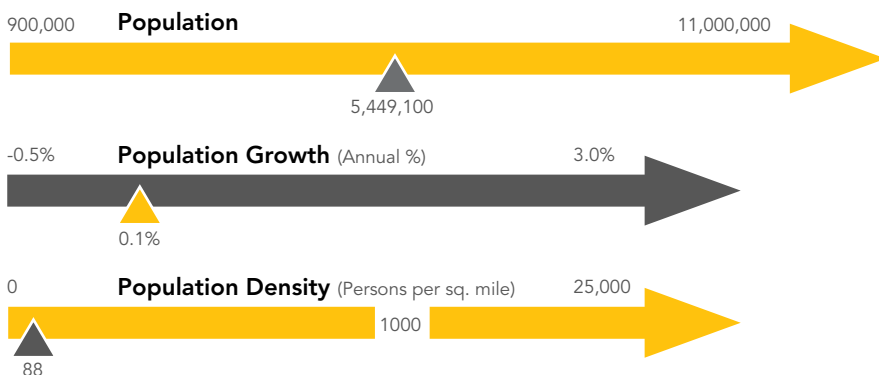
Median Value:
\$92,300

US Median: \$207,300



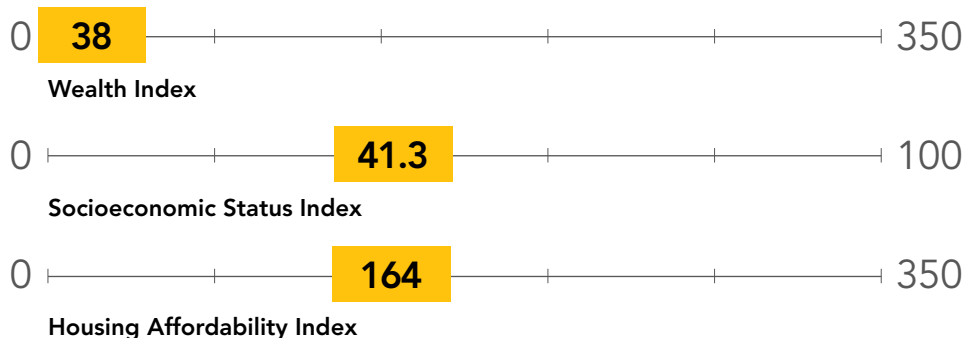
POPULATION CHARACTERISTICS

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

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LifeMode Group: Hometown

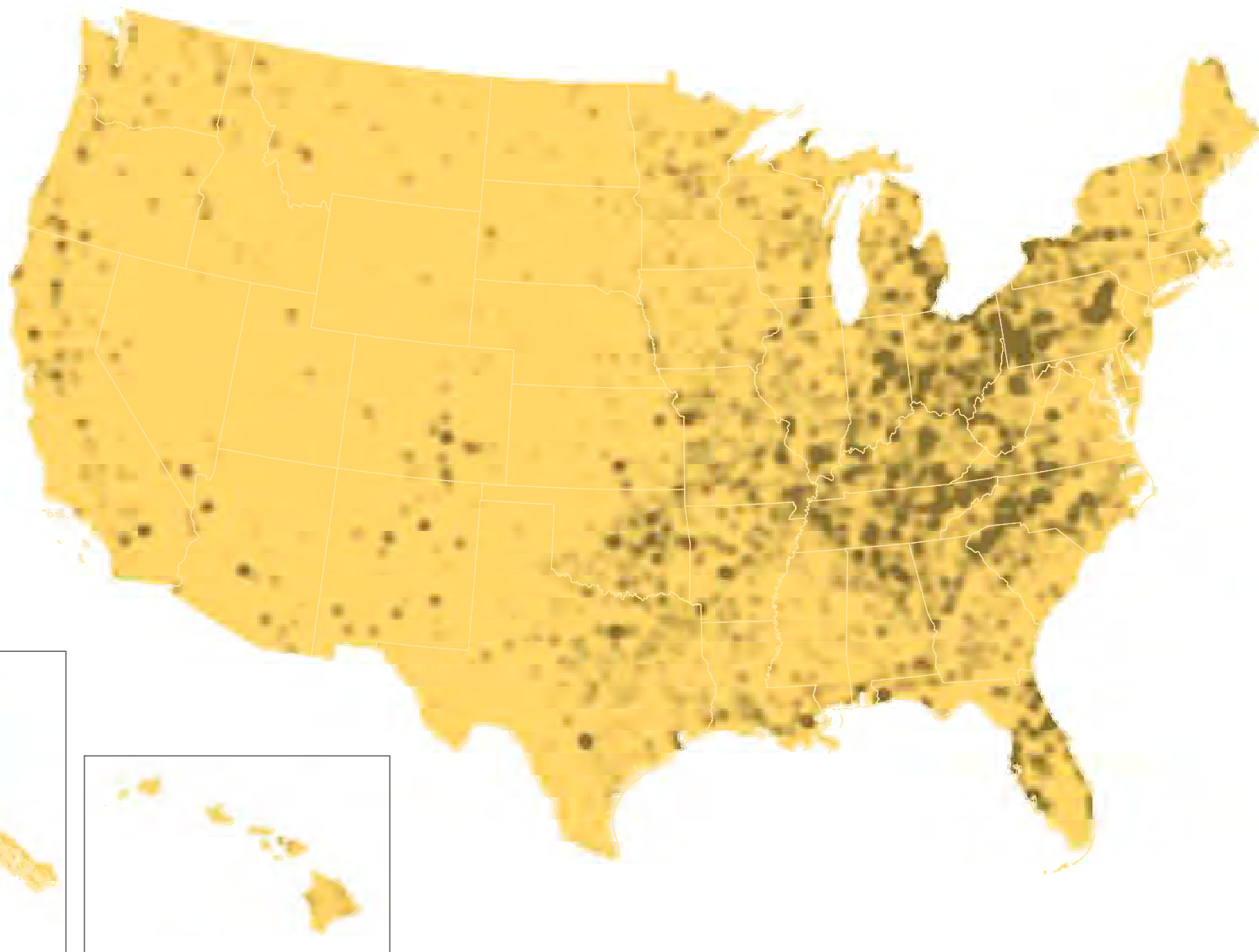
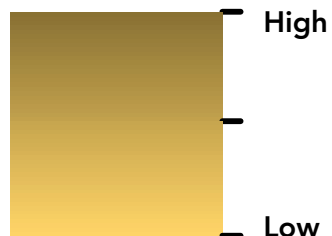
Small Town Sincerity



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SEGMENTATION
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SEGMENT DENSITY

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



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LifeMode Group: Midtown Singles

City Commons

11E

Households: 1,106,600

Average Household Size: 2.67

Median Age: 28.5

Median Household Income: \$18,300

WHO ARE WE?

This segment is one of Tapestry Segmentation's youngest markets. It is primarily composed of single-parent and single-person households living within large metro cities located primarily in the eastern half of the US. While more than a third have a college degree or spent some time in college, nearly a quarter have not finished high school. These residents strive for the best for themselves and their children. Most occupations are within office and administrative Support.

OUR NEIGHBORHOOD

- Single parents (Index 315), primarily female, and singles head these young households.
- Average household size is slightly higher than the US at 2.67.
- *City Commons* residents are found in large metropolitan cities, where most residents rent apartments in mid-rise buildings.
- Neighborhoods are older, built before 1960 (Index 151).
- Typical of the city, many households own either one vehicle or none and use public transportation (Index 292) or taxis (Index 299).

SOCIOECONOMIC TRAITS

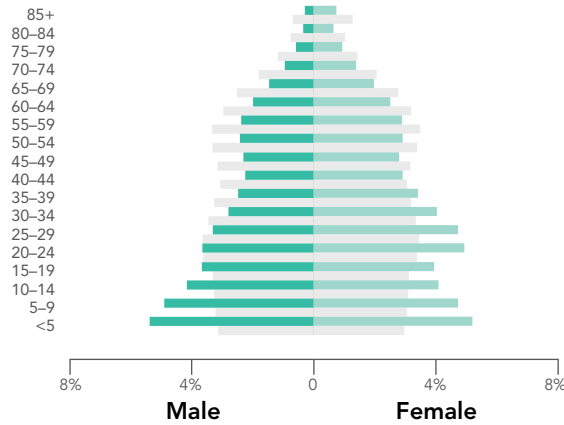
- Although some have college degrees, nearly a quarter have not graduated from high school.
- Labor force participation is low at 53% (Index 84).
- Most households receive income from wages or salaries, with nearly one in four that receive contributions from Social Security (Index 287) and public assistance (Index 355).
- Consumers endeavor to keep up with the latest fashion trends.
- Many families prefer the convenience of fast-food restaurants to cooking at home.



AGE BY SEX (Esri data)

Median Age: **28.5** US: 38.2

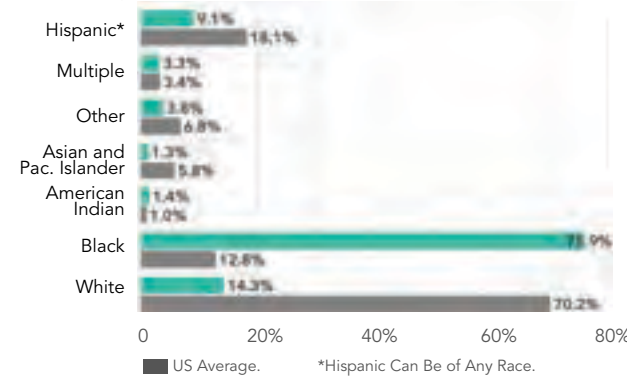
■ Indicates US



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: **50.2** US: 64.0



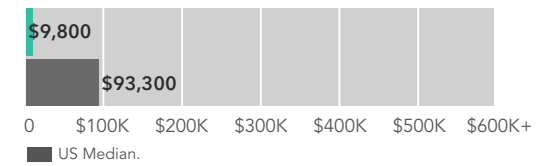
INCOME AND NET WORTH

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

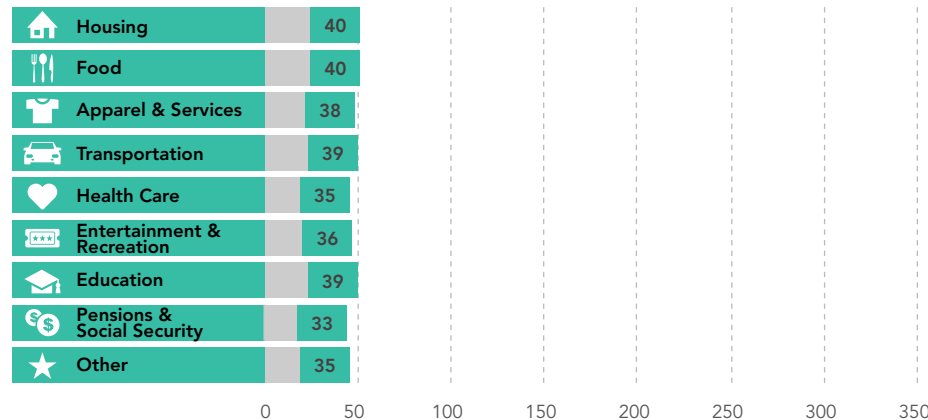


Median Net Worth



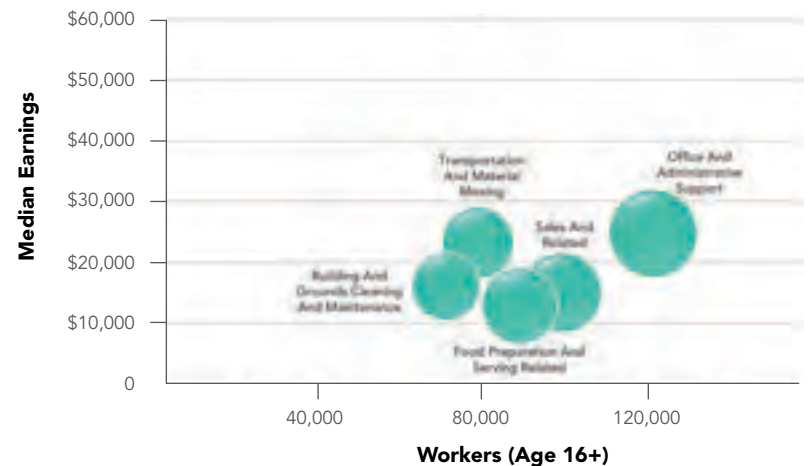
AVERAGE HOUSEHOLD BUDGET INDEX

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.





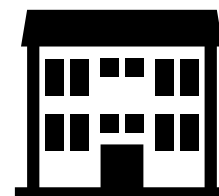
MARKET PROFILE

(Consumer preferences are estimated from data by MRI-Simmons.)

- Baby and children's products, like food and clothing, are the primary purchases.
- Shop primarily at warehouse clubs like Sam's Club, Walmart Supercenter, and discount department stores such as Old Navy and Burlington.
- While most residents obtain privately issued medical insurance plans, some are covered by federal programs like Medicaid.
- Subscribe to cable TV; children-oriented programs are popular, as are game shows and movie channels.
- Magazines are extremely popular sources of news and the latest trends, including baby, bridal, and parenthood types of magazines.
- Enjoy listening to urban radio.

HOUSING

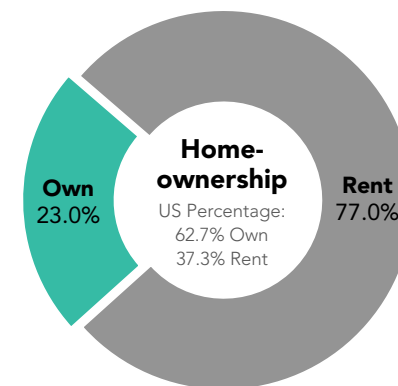
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Multiunit Rentals;
Single Family

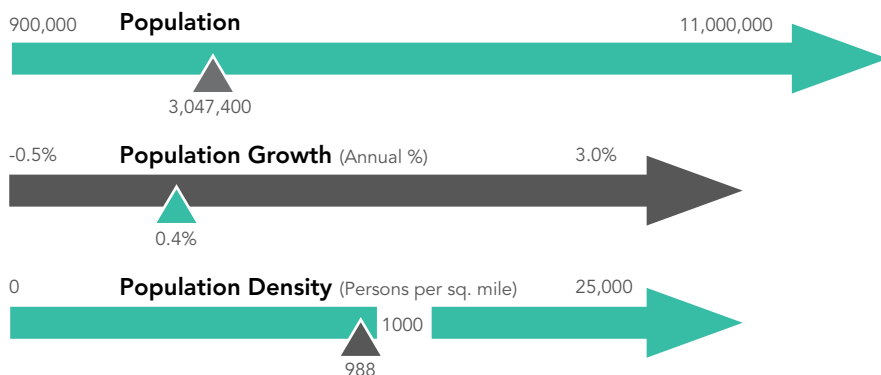
Average Rent:
\$658

US Average: \$1,038



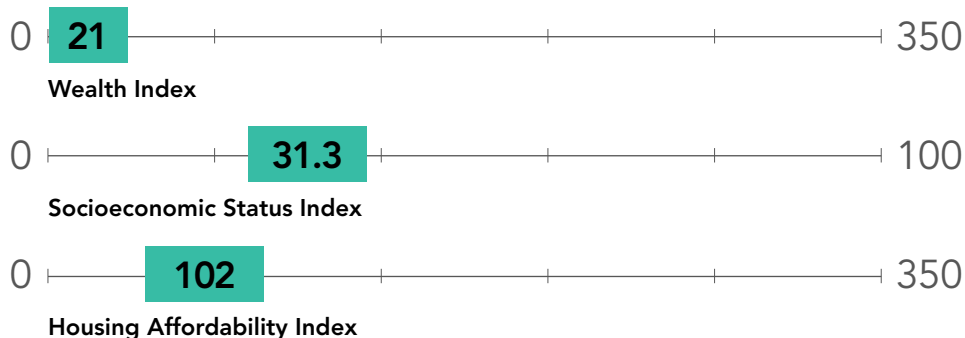
POPULATION CHARACTERISTICS

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

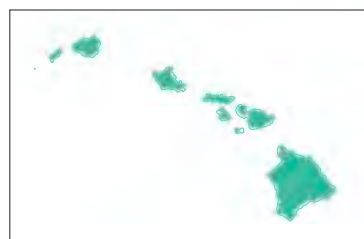
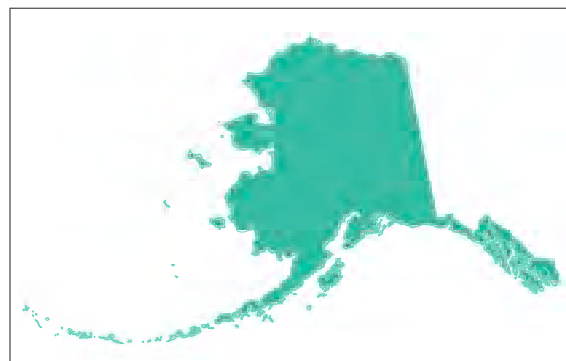
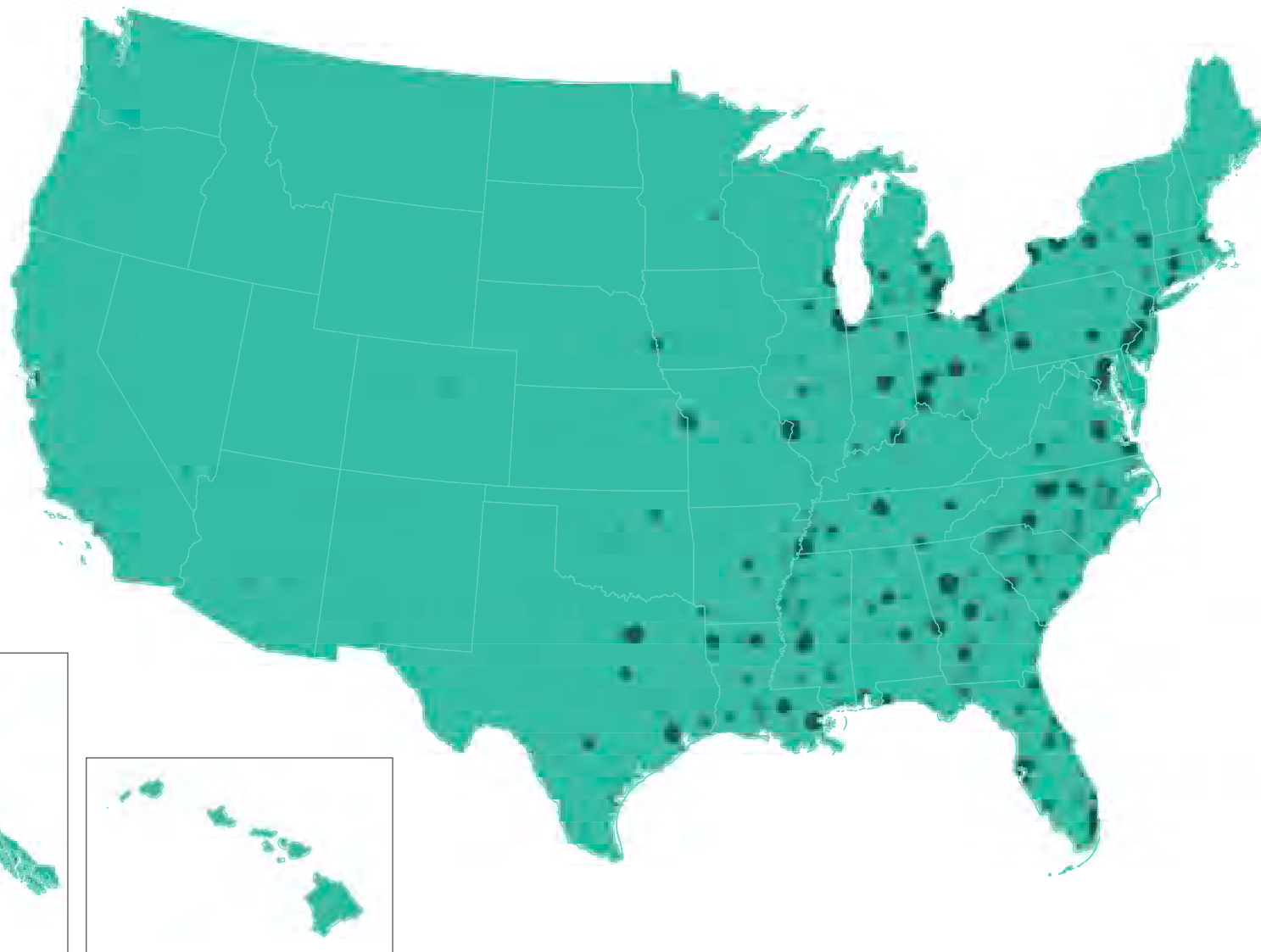
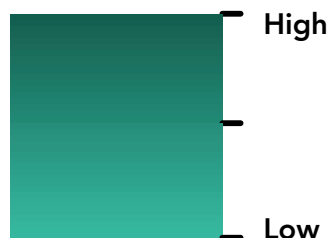
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *City Commons* 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. 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

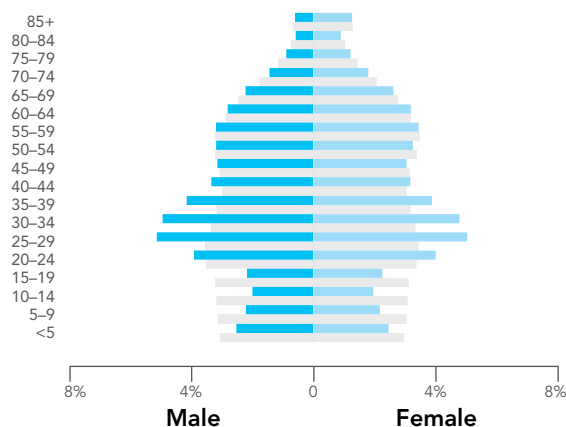
- Consumers research products carefully before making purchases.
- They buy natural, green, and environmentally friendly products.
- Very conscious of nutrition, they regularly buy and eat organic foods.
- Cell phones and text messaging are a huge part of everyday life.
- They place importance on learning 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

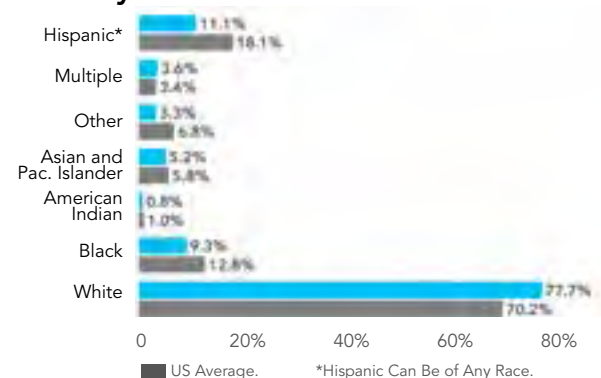
■ Indicates US



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



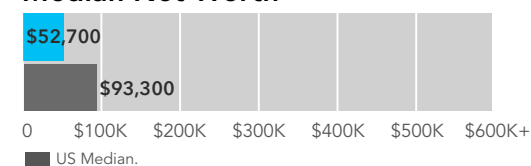
INCOME AND NET WORTH

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

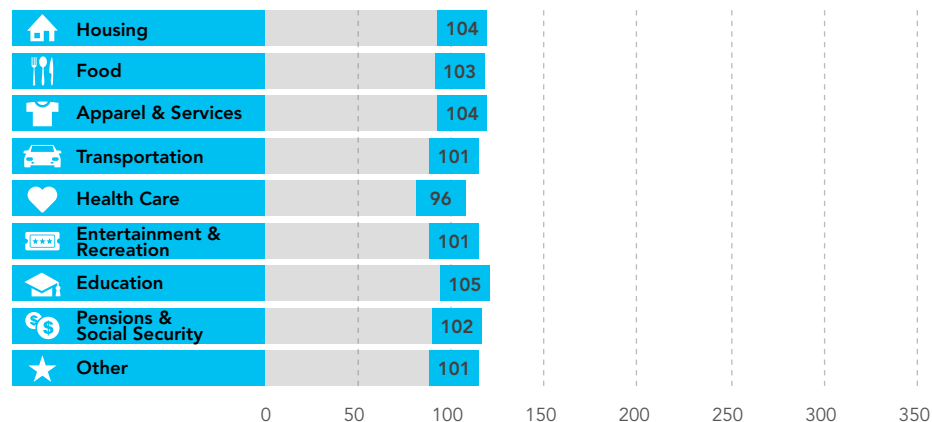


Median Net Worth



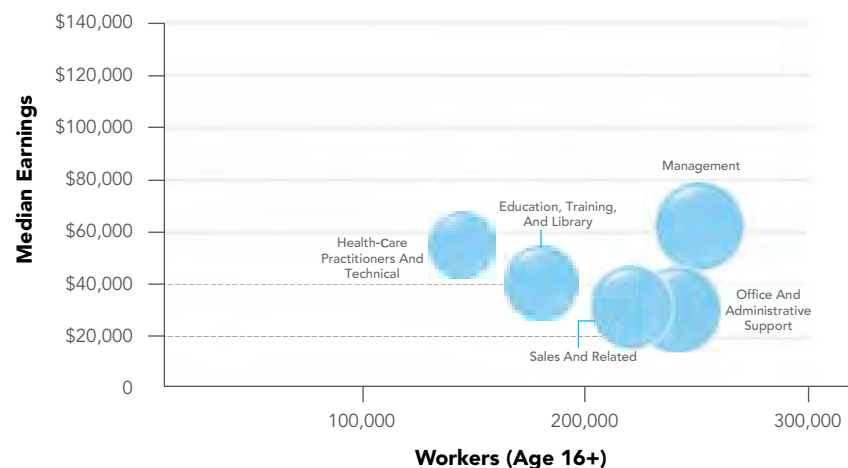
AVERAGE HOUSEHOLD BUDGET INDEX

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 MRI-Simmons.)

- 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

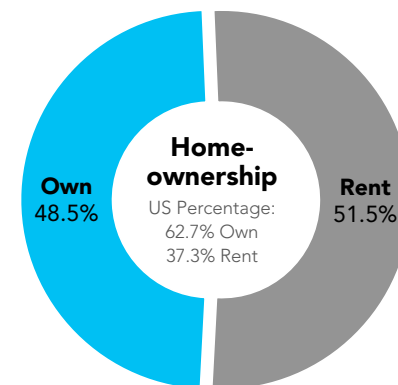
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family;
Multi-Units

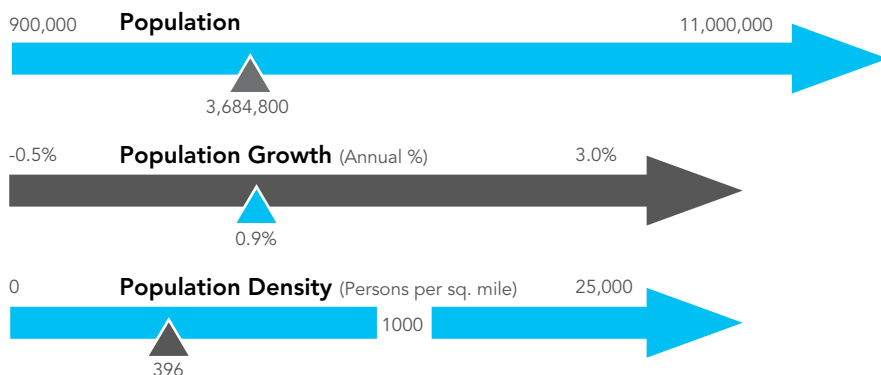
Average Rent:
\$1,087

US Average: \$1,038



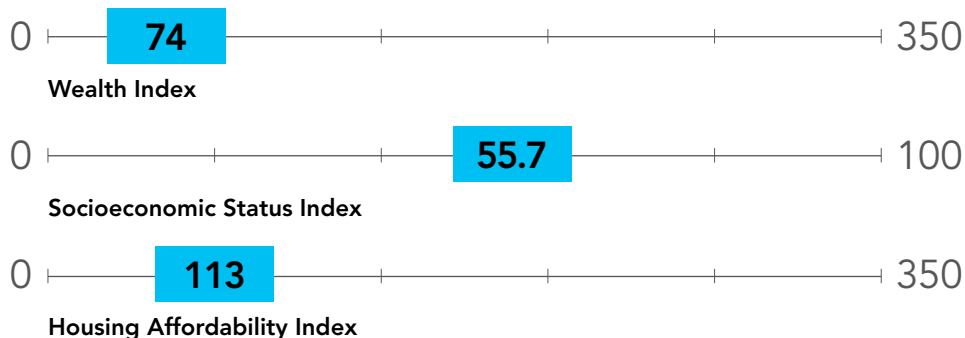
POPULATION CHARACTERISTICS

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

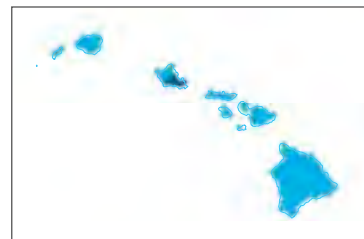
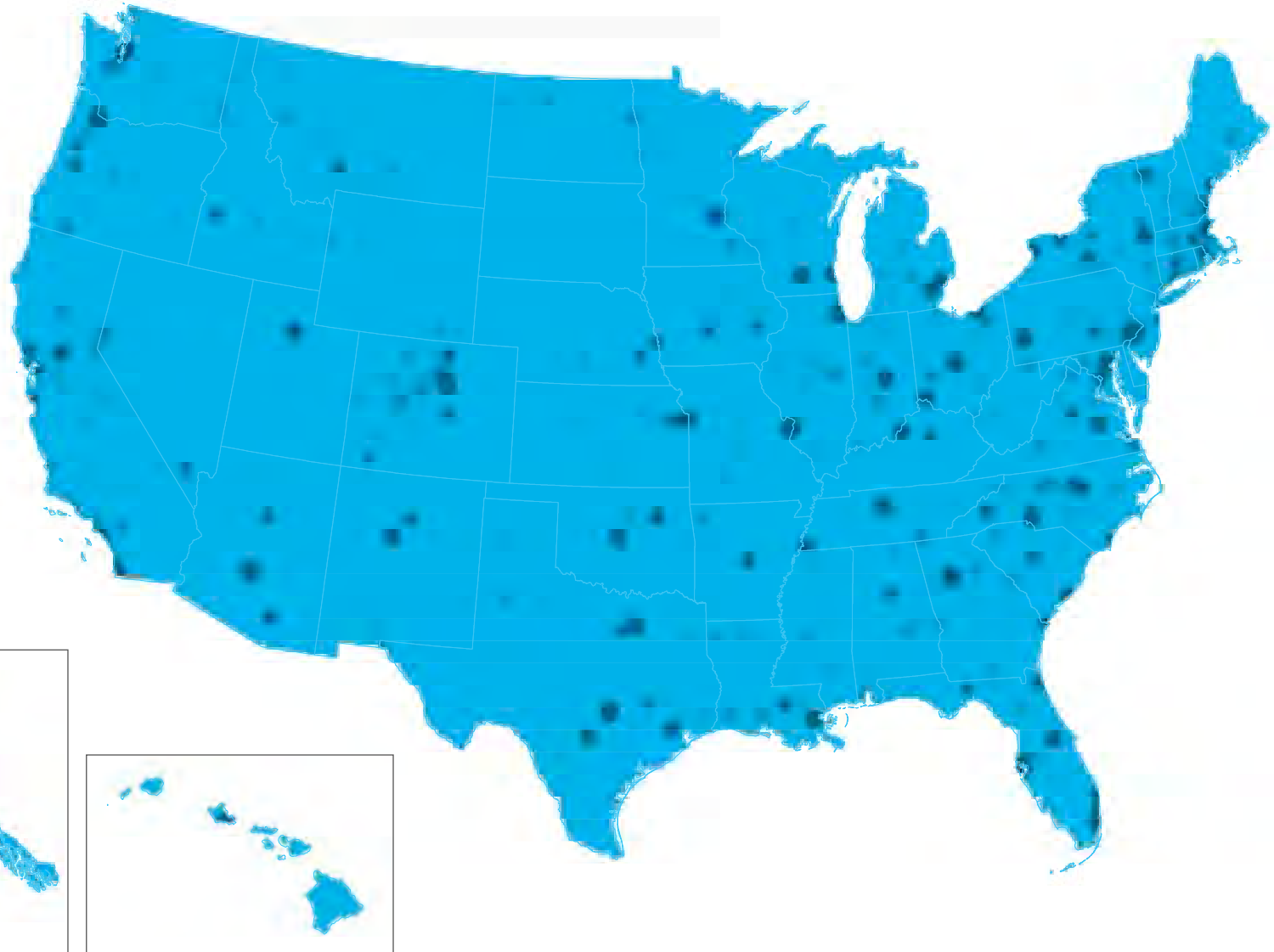
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

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





LifeMode Group: Hometown

Family Foundations

12A

Households: 1,299,600

Average Household Size: 2.71

Median Age: 39.6

Median Household Income: \$43,100

WHO ARE WE?

Family and faith are the cornerstones of life in these communities. Older children, still living at home, working toward financial independence, are common within these households. Neighborhoods are stable: little household growth has occurred for more than a decade. Many residents work in the health-care industry or public administration across all levels of government. Style is important to these consumers, who spend on clothing for themselves and their children as well as on smartphones.

OUR NEIGHBORHOOD

- *Family Foundations* residents are a mix of married couples, single parents, grandparents, and children, young and adult.
- Average household size is slightly higher at 2.71.
- Neighborhoods are found in principal cities of major metropolitan areas throughout the South and West.
- More than two-thirds are homeowners living in single-family houses built before 1970.
- Nearly three-fourths of all households have one or two vehicles at their disposal; average commute time is slightly higher.

SOCIOECONOMIC TRAITS

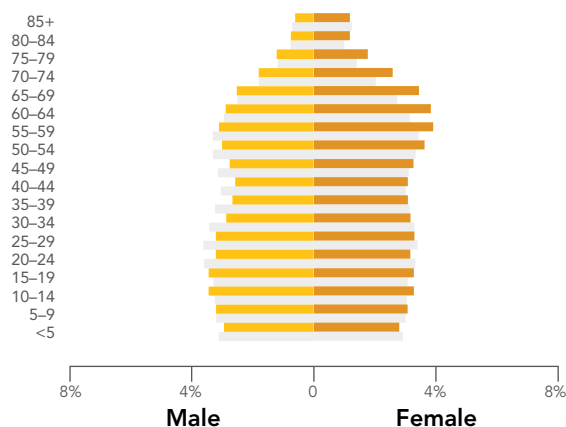
- More than half have either attended college or obtained a degree; one-third have only finished high school.
- Labor force participation rate is slightly lower at 58% as workers begin to retire.
- Over one-third of households currently receive Social Security benefits; just under a quarter draw income from retirement accounts.
- A strong focus is on religion and character.
- Style and appearance are important.



AGE BY SEX (Esri data)

Median Age: **39.6** US: 38.2

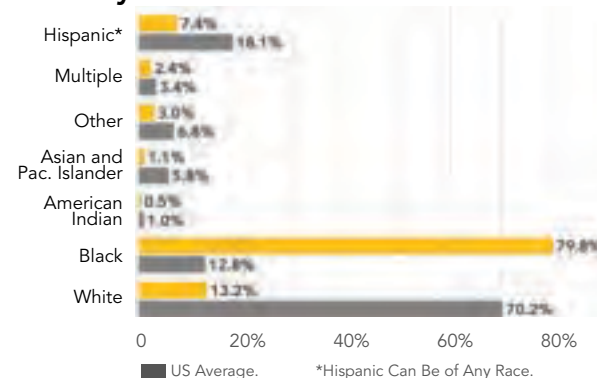
■ Indicates US



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: **43.5** US: 64.0



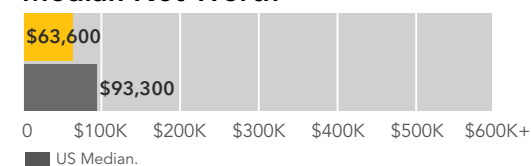
INCOME AND NET WORTH

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

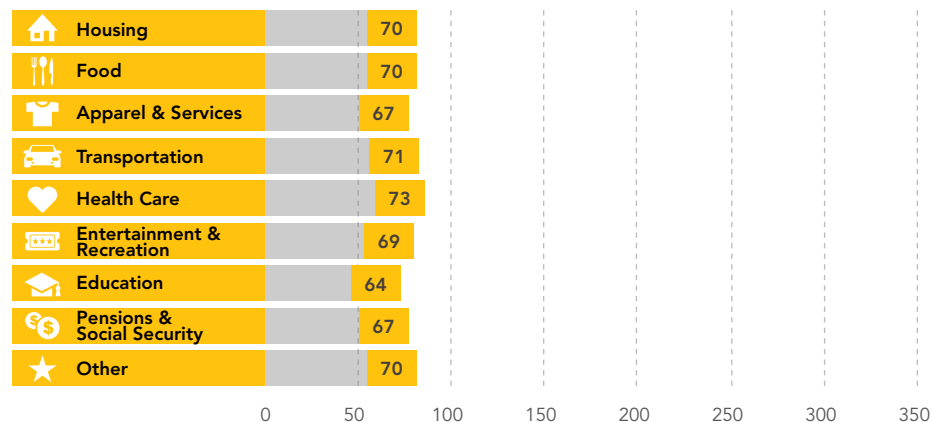


Median Net Worth



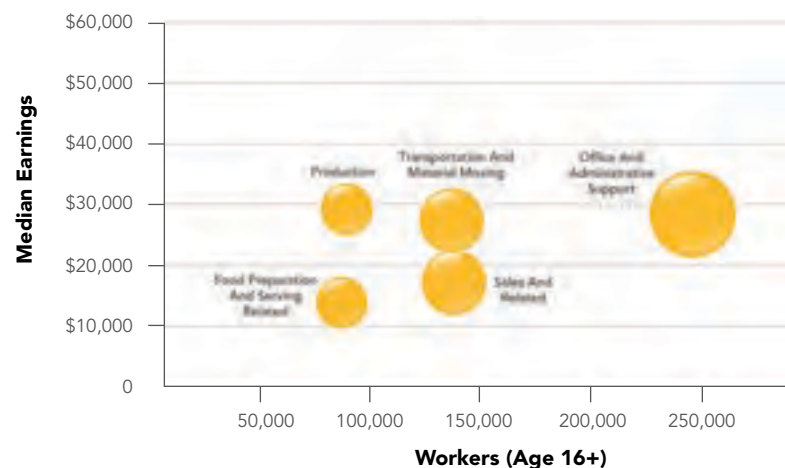
AVERAGE HOUSEHOLD BUDGET INDEX

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 MRI-Simmons.)

- Baby and children's products are the primary purchases made by *Family Foundations* residents.
- Shop at discount stores, such as Marshalls, Kmart, dollar stores, and take advantage of savings at Sam's Club.
- Many have no financial investments or retirement savings.
- Magazines, particularly focusing on health and children, are popular.
- Enjoy listening to urban format radio.
- Favorite entertainment sources include television: subscribe to premium cable channels and own three to four TVs.
- Connected, using the internet primarily for entertainment, chat rooms, and online gaming.

HOUSING

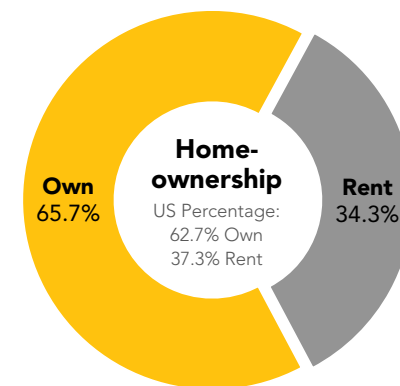
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

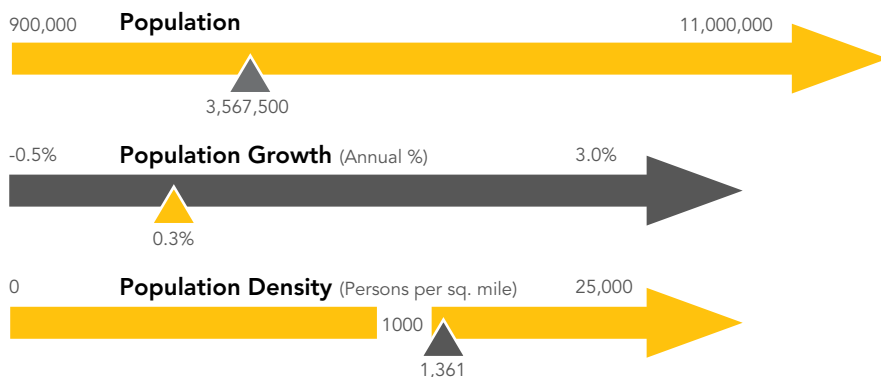
Median Value:
\$116,600

US Median: \$207,300



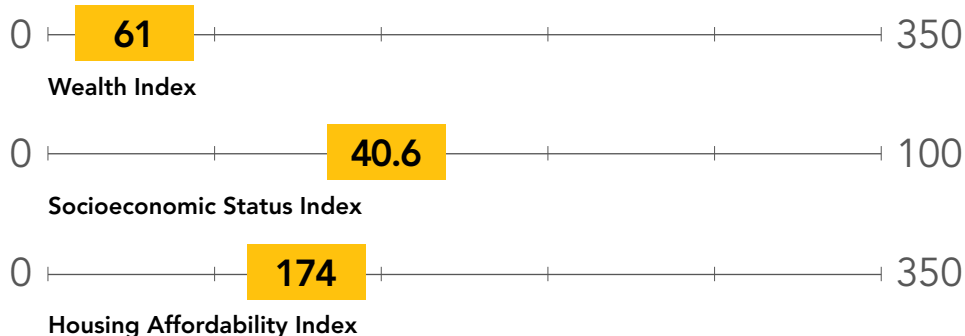
POPULATION CHARACTERISTICS

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

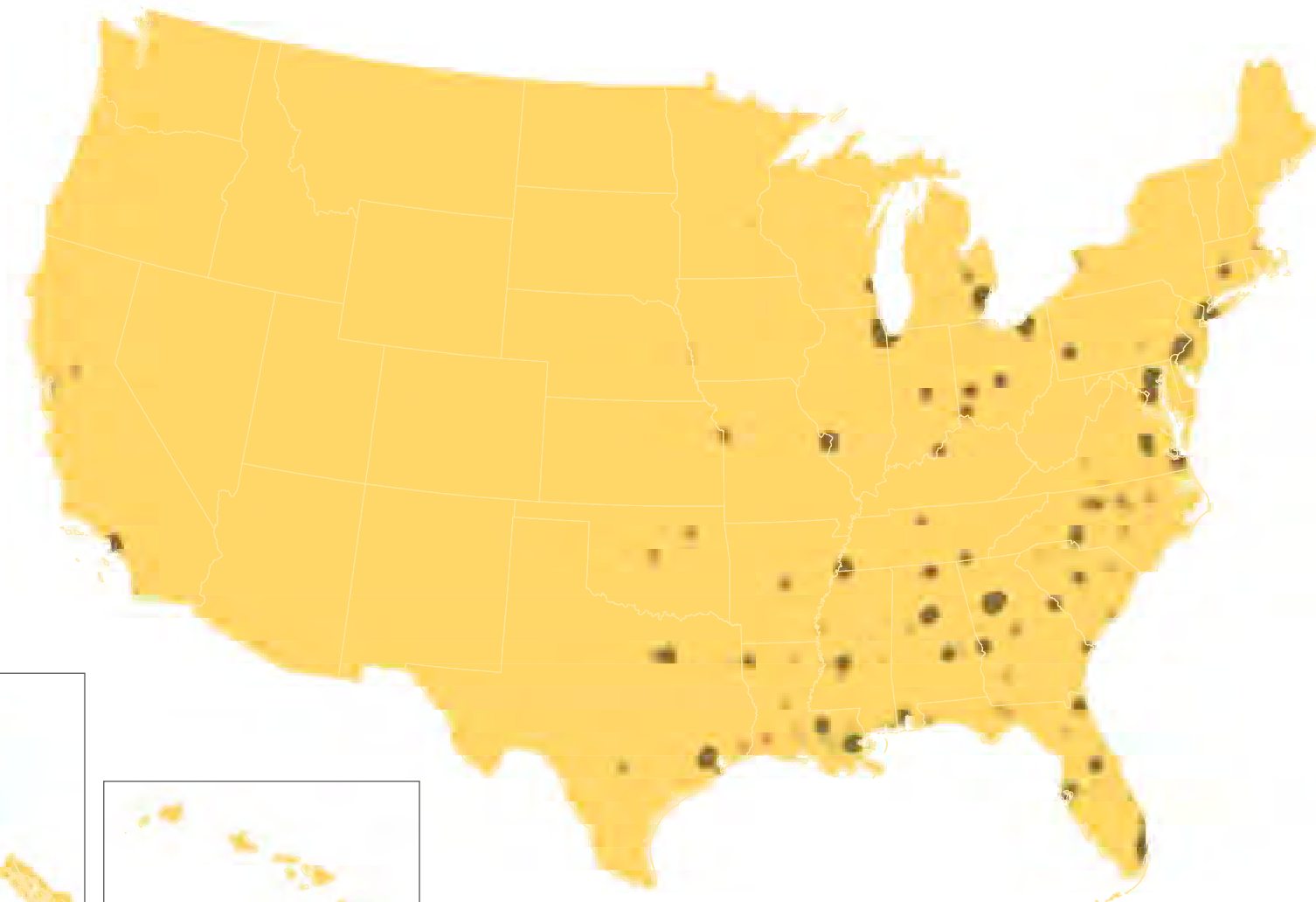
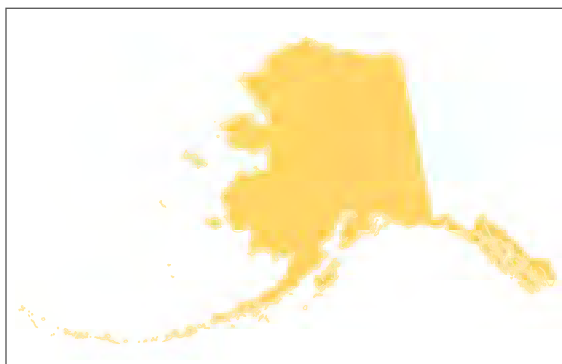
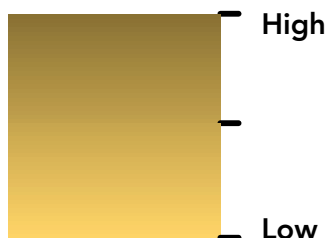
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *Family Foundations* Tapestry Segment by households.





LifeMode Group: Senior Styles

Golden Years

9B

Households: 1,657,400

Average Household Size: 2.06

Median Age: 52.3

Median Household Income: \$71,700

WHO ARE WE?

Independent, active seniors nearing the end of their careers or already in retirement best describes *Golden Years* residents. This market is primarily singles living alone or empty nesters. Those still active in the labor force are employed in professional occupations; however, these consumers are actively pursuing a variety of leisure interests—travel, sports, dining out, museums, and concerts. They are involved, focused on physical fitness, and enjoying their lives. This market is smaller, but growing, and financially secure.

OUR NEIGHBORHOOD

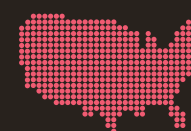
- This older market has a median age of 52 years and a disproportionate share (nearly 32%) of residents aged 65 years or older.
- Single-person households (over 40%) and married-couple families with no children (one-third) dominate these neighborhoods; average household size is low at 2.06 (Index 80).
- Most of the housing was built after 1970; approximately 43% of householders live in single-family homes and 43% in multiunit dwellings.
- These neighborhoods are found in large metropolitan areas, outside central cities, scattered across the US.

SOCIOECONOMIC TRAITS

- *Golden Years* residents—22% have graduate or professional degrees, 28% have bachelor's degrees, and 25% have some college credits.
- Labor force participation is somewhat low at 56% (Index 89), due to residents reaching retirement.
- Median household income is higher in this market, more than \$71,000. Although wages still provide income to nearly two out of three households, earned income is available from investments (Index 171), Social Security benefits (Index 146), and retirement income (Index 144).
- These consumers are well connected: Internet access is used for everything from shopping or paying bills to monitoring investments and entertainment.
- They are generous supporters of the arts and charitable organizations.
- They keep their landlines and view cell phones more as a convenience.



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



AGE BY SEX (Esri data)

Median Age: **52.3** US: 38.2

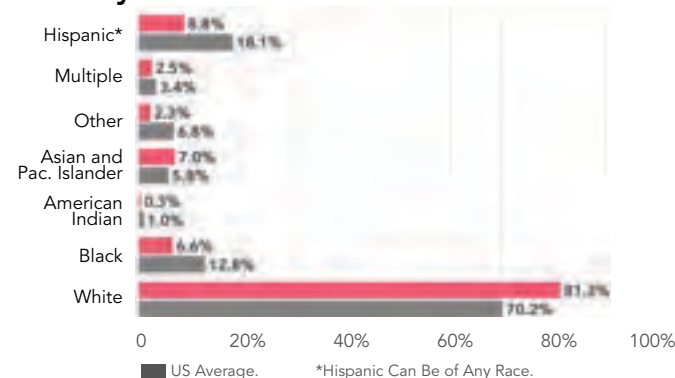
■ Indicates US



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: **43.8** US: 64.0



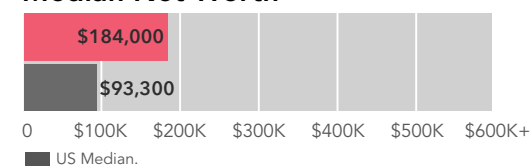
INCOME AND NET WORTH

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

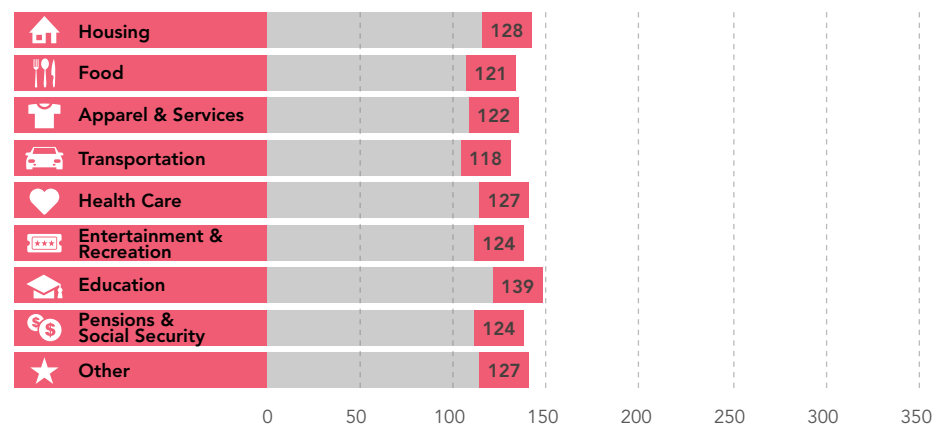


Median Net Worth



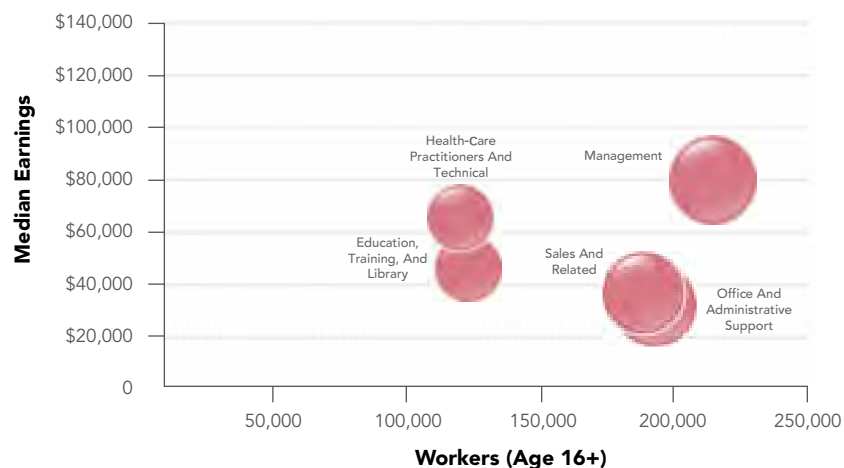
AVERAGE HOUSEHOLD BUDGET INDEX

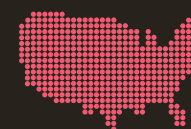
The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average.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

- Avid readers, they regularly read daily newspapers, particularly the Sunday edition.
- They subscribe to cable TV; news and sports programs are popular as well as on-demand movies.
- They use professional services to maintain their homes inside and out and minimize their chores.
- Leisure time is spent on sports (tennis, golf, boating, and fishing) or simple exercise like walking.
- Good health is a priority; they believe in healthy eating, coupled with vitamins and dietary supplements.
- Active social lives include travel, especially abroad, plus going to concerts and museums.
- Residents maintain actively managed financial portfolios that include a range of instruments such as IRAs, common stocks, and certificates of deposit (more than six months).

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.



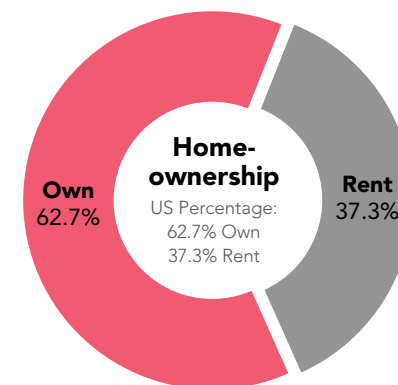
Typical Housing:

Single Family;
Multiunits

Median Value:

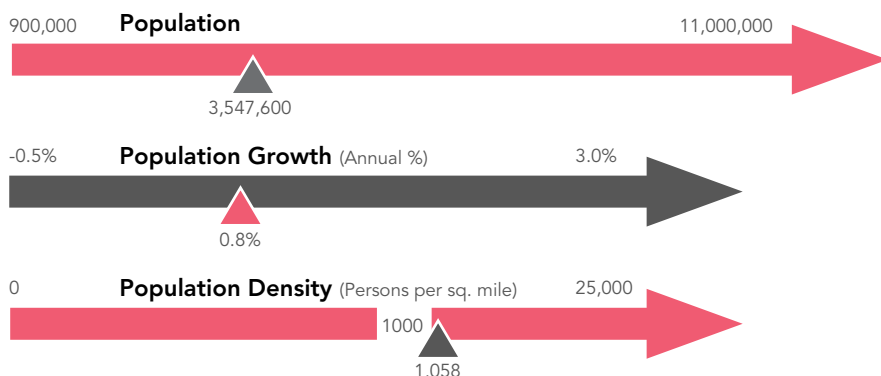
\$332,100

US Median: \$207,300



POPULATION CHARACTERISTICS

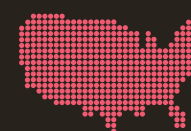
Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

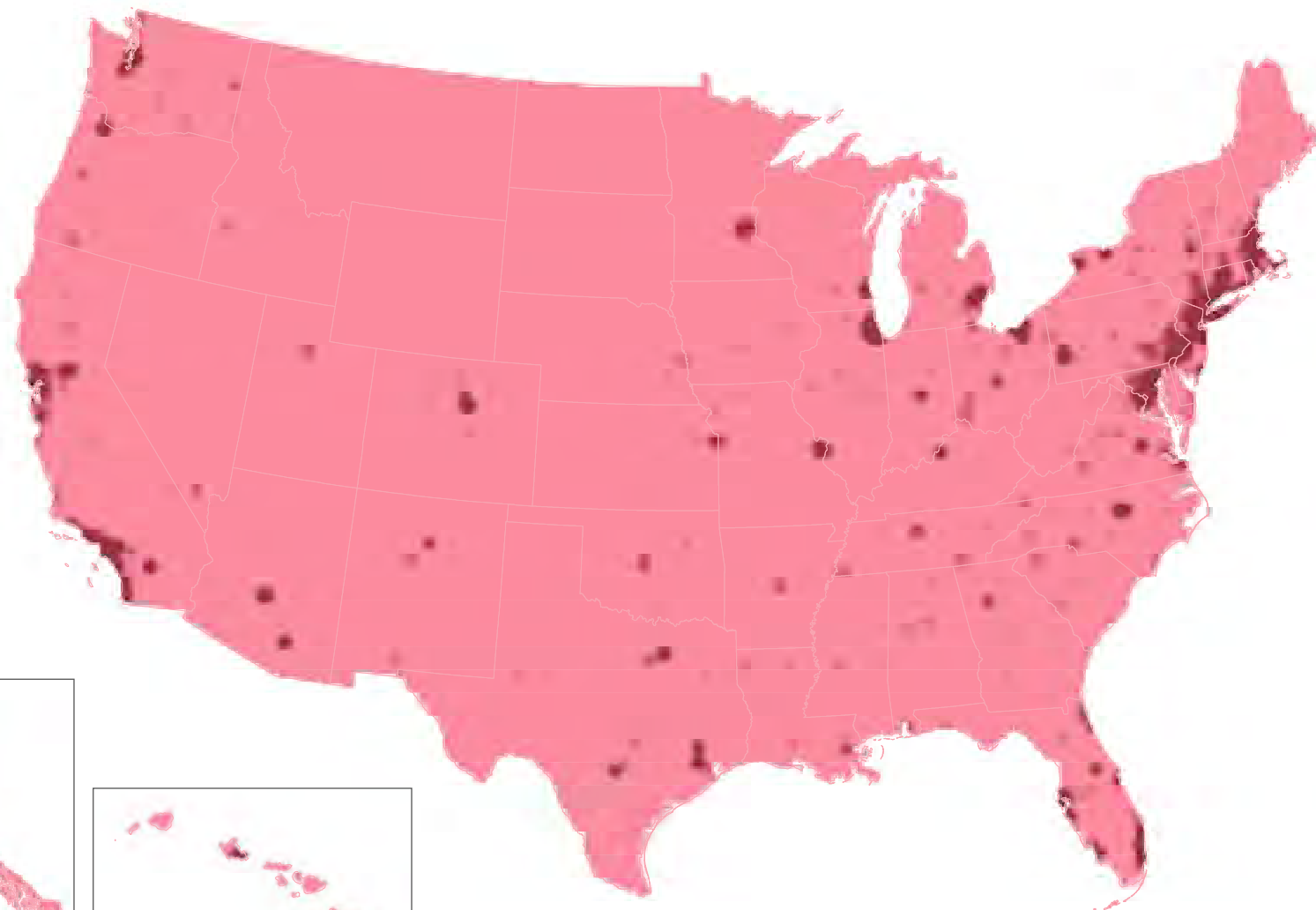
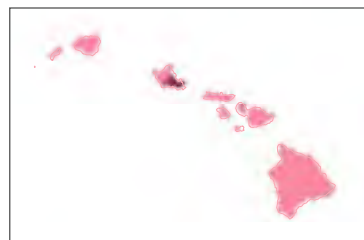
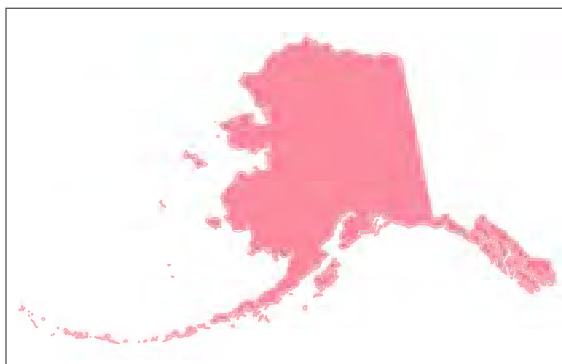
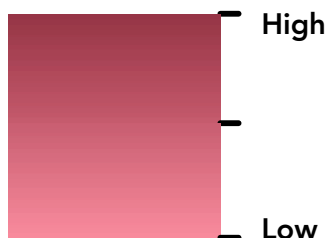
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *Golden Years* Tapestry Segment by households.





LifeMode Group: Middle Ground

Hometown Heritage

8G

Households: 1,507,700

Average Household Size: 2.66

Median Age: 32.4

Median Household Income: \$28,200

WHO ARE WE?

Hometown Heritage neighborhoods are in urbanized areas within central cities, with older housing, located mainly in the Midwest and South. This slightly smaller market is primarily a family market, married couples (with and without children) and single parents. They work mainly in service, manufacturing, and retail trade industries. 60% of householders are renters, living primarily in single-family homes, with a higher proportion of dwellings in 2–4 unit buildings.

OUR NEIGHBORHOOD

- Renters: About three-fifths of households.
- Primarily family households, married couples with or without children, single parents (Index 203), and multigenerational households (Index 137).
- Primarily single-family homes (61%), with a higher proportion of dwellings in 2–4 unit buildings (Index 225).
- Older housing, built before 1960 (59%), with a higher proportion built in the 1940s (Index 215) or earlier (Index 257).
- Higher percentage of vacant housing units at 18% (Index 155).
- Most households with one or two vehicles (71%), but 19% have no vehicle (Index 204).

SOCIOECONOMIC TRAITS

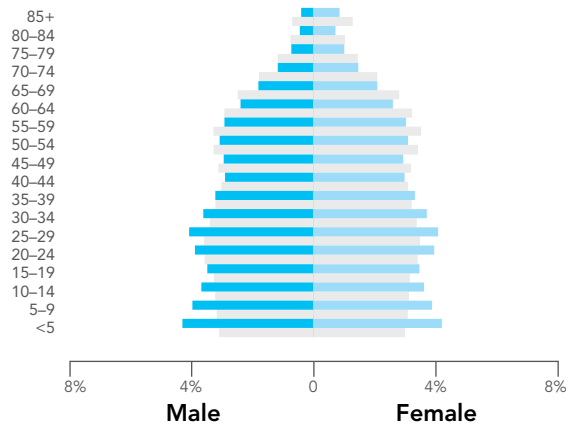
- Education completed: 38% with a high school diploma only (Index 137); 28% with some college or an associate's degree (Index 97).
- Higher rates of employment in manufacturing.
- Labor force participation rate is lower at 57.1%.
- Wages and salaries are the primary source of income for 70% of households, with contributions from Supplemental Security Income for 12% (Index 232) and public assistance for 7% (Index 254).
- These cost-conscious consumers purchase sale items in bulk and buy generic over name brands.
- They tend to save money for a specific purpose.



AGE BY SEX (Esri data)

Median Age: **32.4** US: 38.2

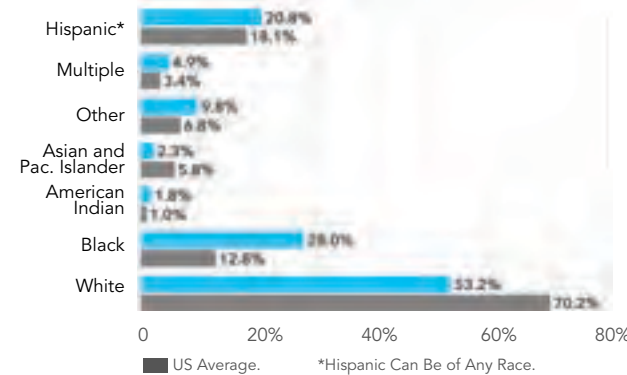
■ Indicates US



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: **75.7** US: 64.0



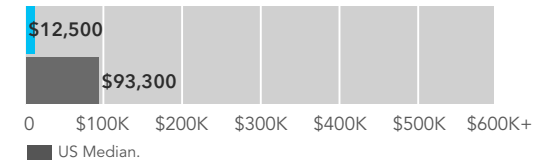
INCOME AND NET WORTH

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

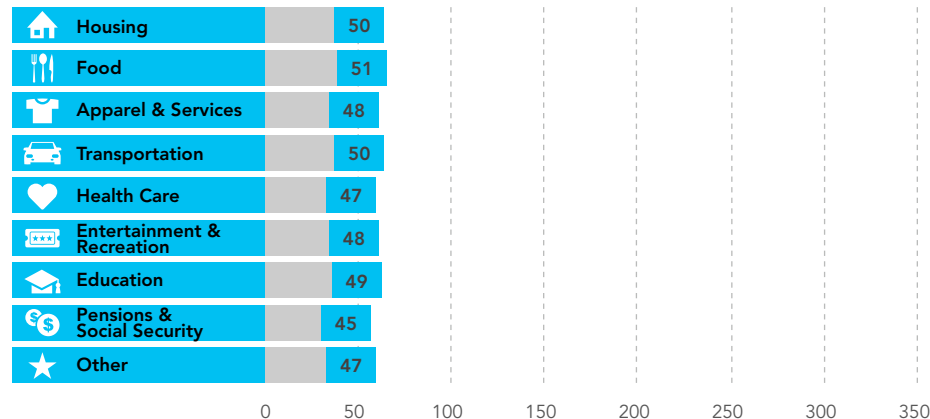


Median Net Worth



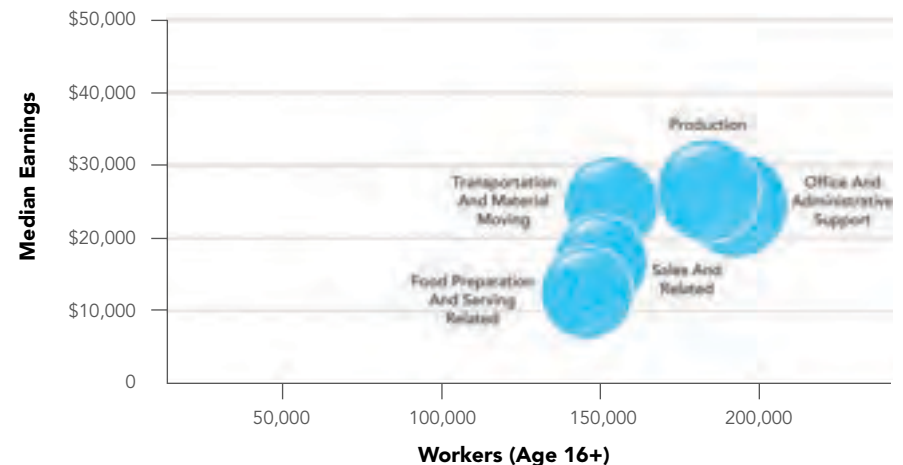
AVERAGE HOUSEHOLD BUDGET INDEX

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.





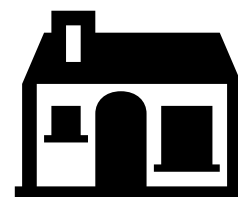
MARKET PROFILE

(Consumer preferences are estimated from data by MRI-Simmons.)

- For those with young children at home, watching Disney Channel, Cartoon Network, and Nickelodeon on TV is popular; diapers, baby food, and children's clothing are priority expenditures.
- Favor shopping at their local discount store, search for bargains on the internet, or purchasing from in-home sales representatives.
- Read parenting and health magazines.
- Watch programs on BET, VH1, and Game Show Network.
- Prefer to listen to gospel, R&B, rap, and hip-hop music.
- Like to listen to sports on the radio and watch on TV. Favorite sports include NASCAR racing, professional wrestling, and basketball.

HOUSING

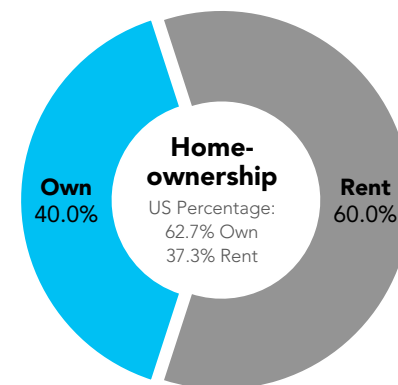
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

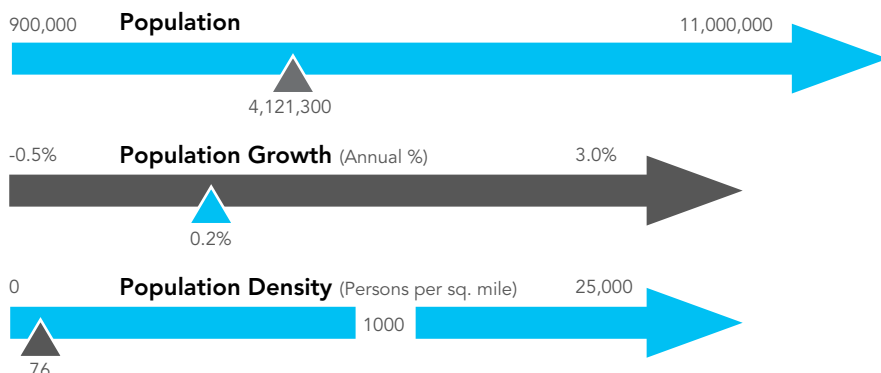
Average Rent:
\$710

US Average: \$1,038



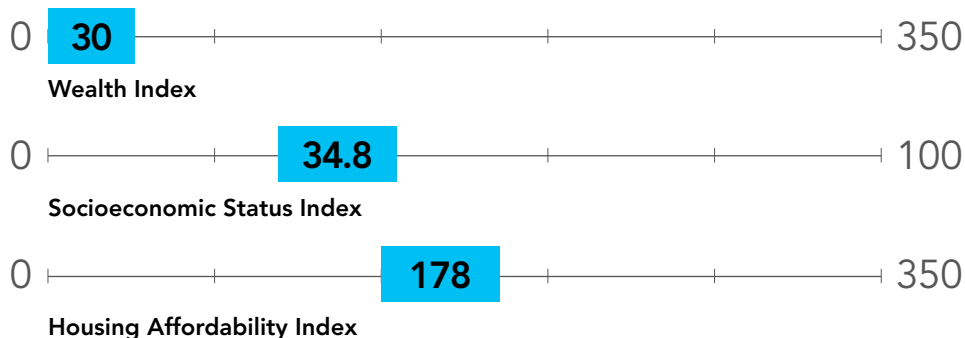
POPULATION CHARACTERISTICS

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

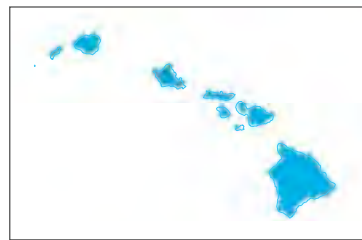
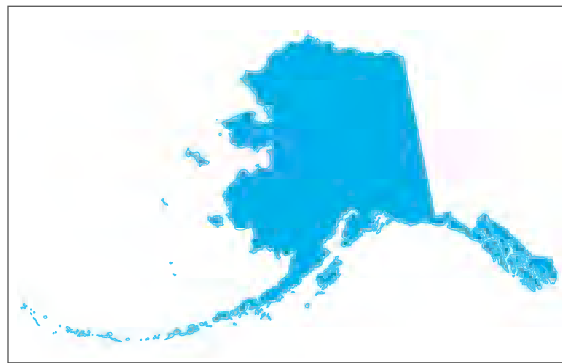
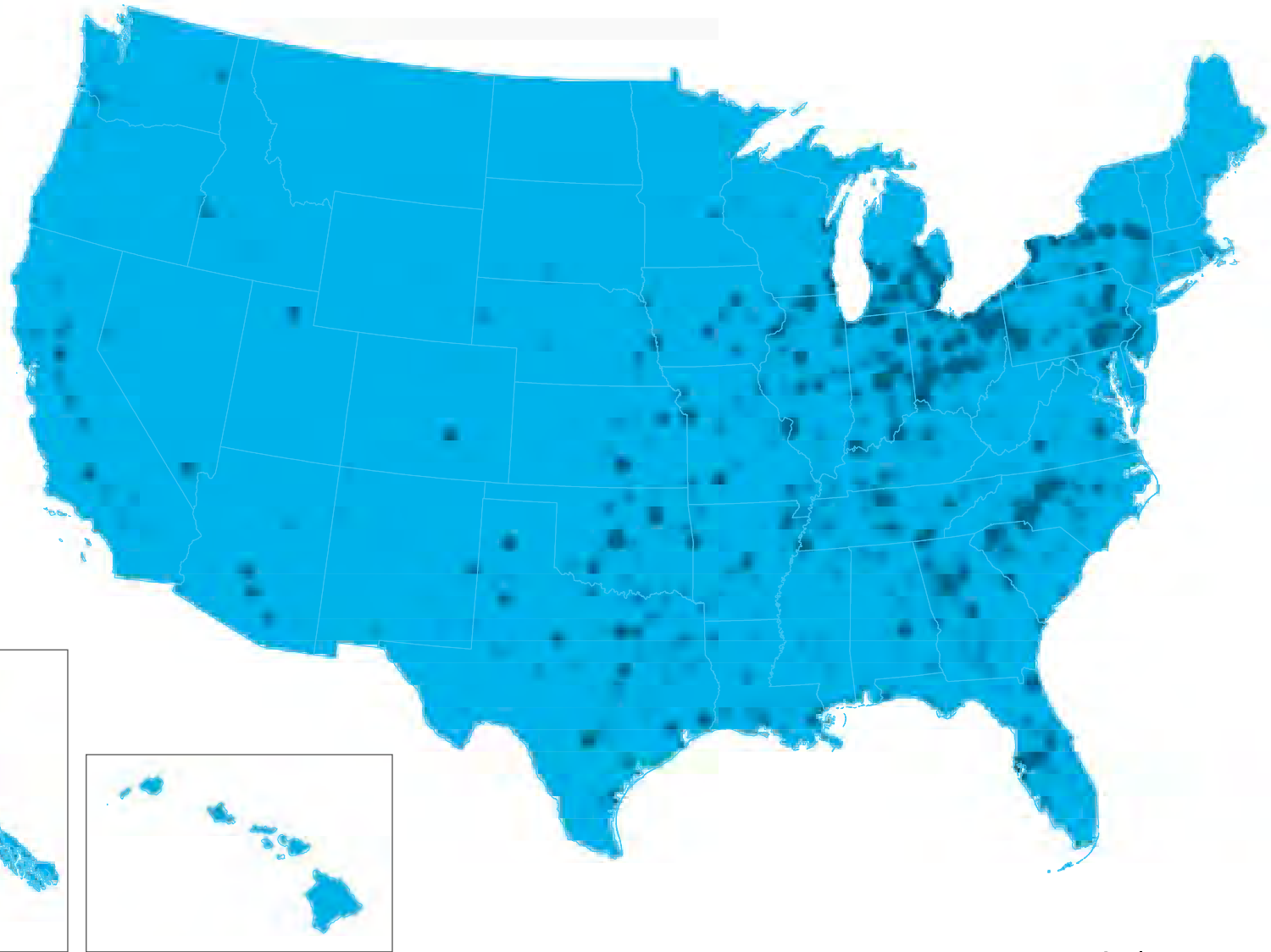
Esri developed three indexes to display average household wealth, socioeconomic status and housing affordability for the market relative to the US.





SEGMENT DENSITY

This map illustrates the density and distribution of the *Hometown Heritage* Tapestry Segment by households.





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.
- Homeownership 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 townhomes (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

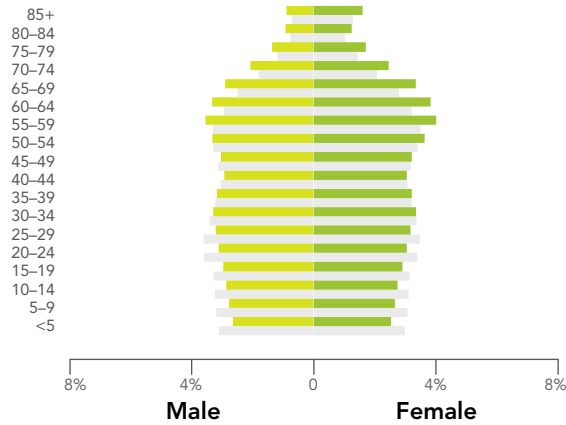
- College educated: 48% are graduates (Index 155); 77% with some college education.
- Higher labor force participation rate is at 67% (Index 108) with proportionately more two-worker households (Index 110).
- Median household income of \$73,000 reveals an affluent market with income supplemented by investments (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

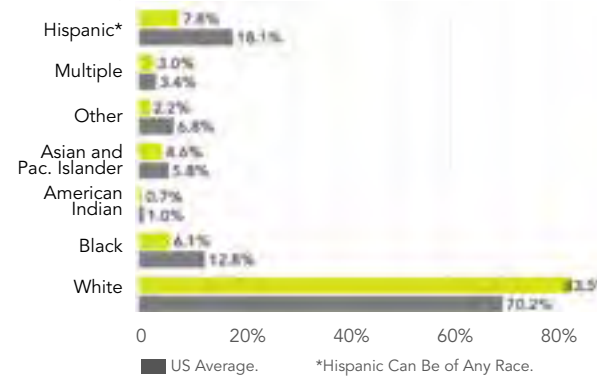
■ Indicates US



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



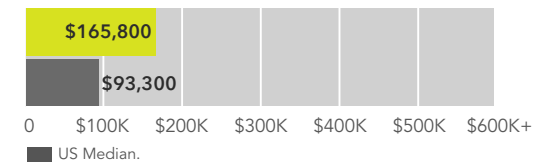
INCOME AND NET WORTH

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

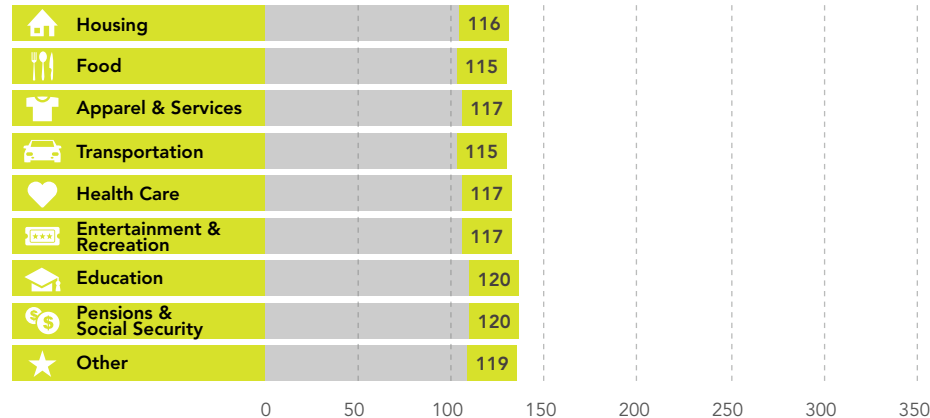


Median Net Worth



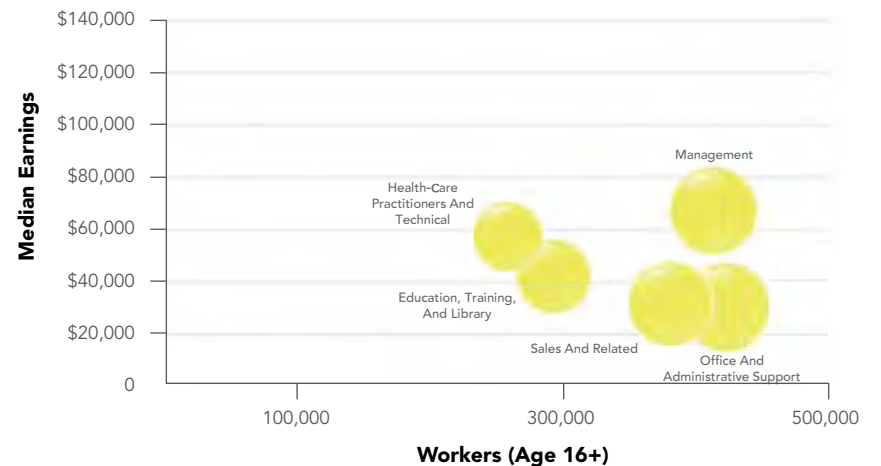
AVERAGE HOUSEHOLD BUDGET INDEX

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.





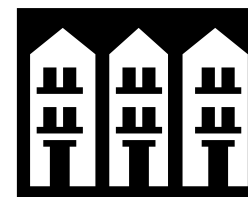
MARKET PROFILE

(Consumer preferences are estimated from data by MRI-Simmons.)

- 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

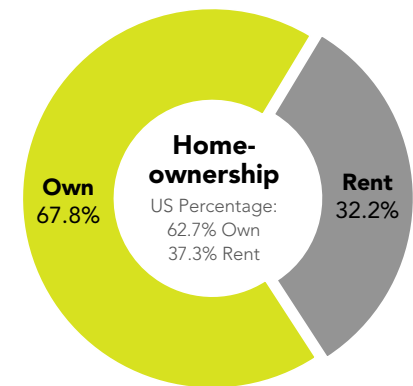
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

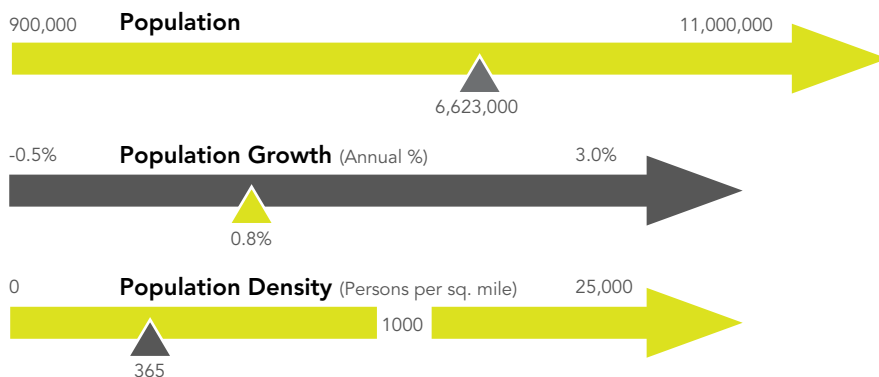
Median Value:
\$243,900

US Median: \$207,300



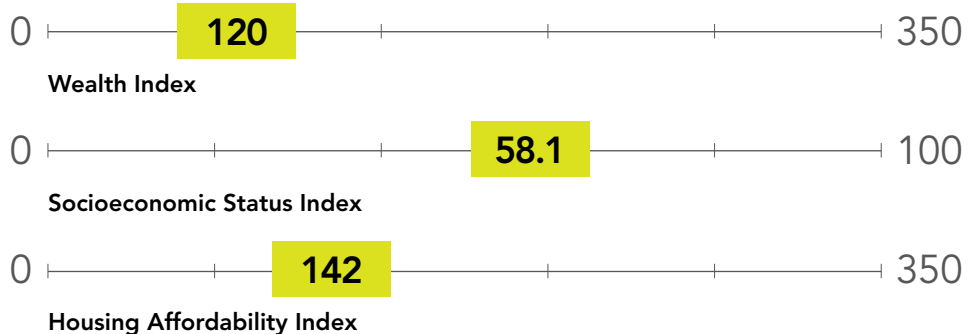
POPULATION CHARACTERISTICS

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

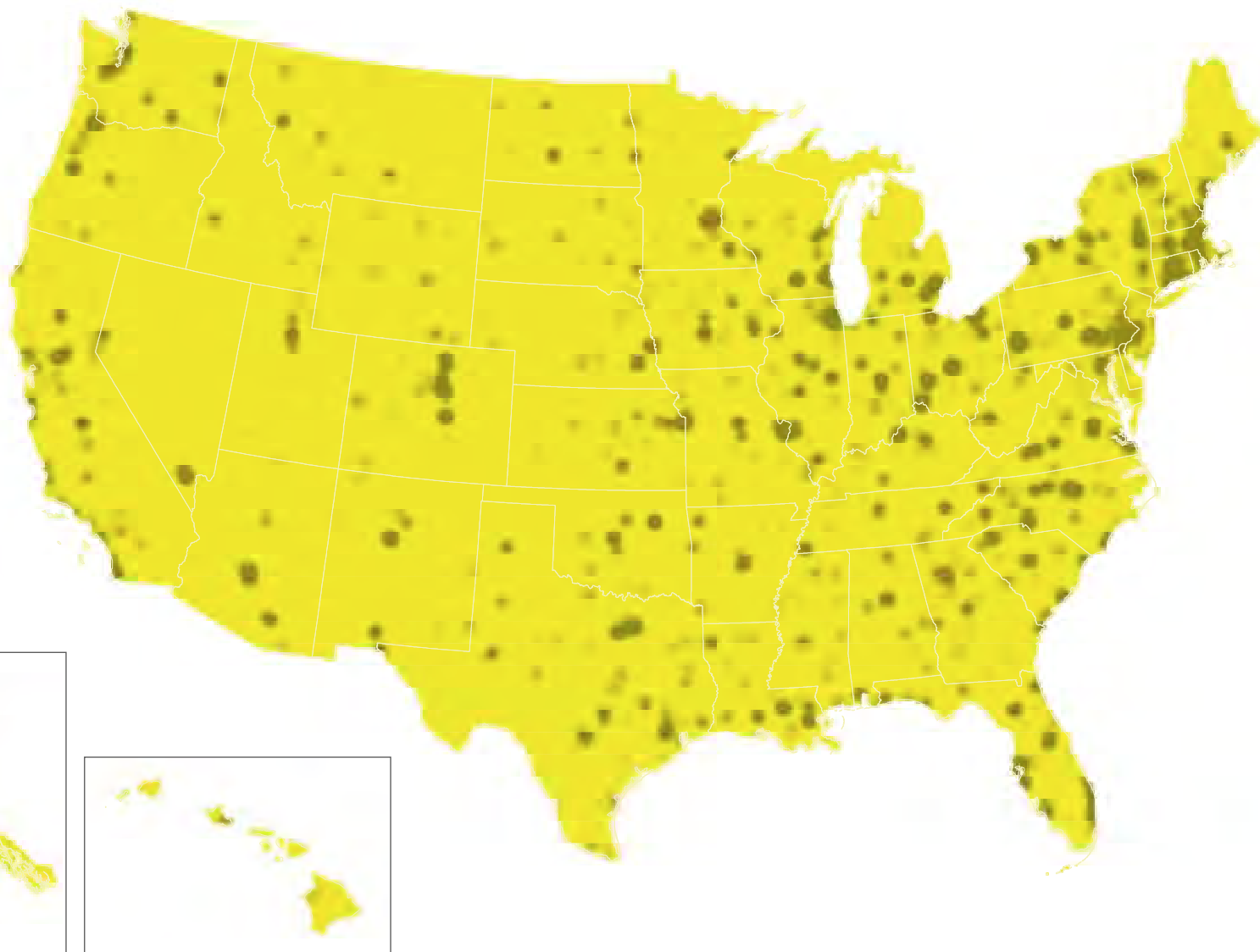
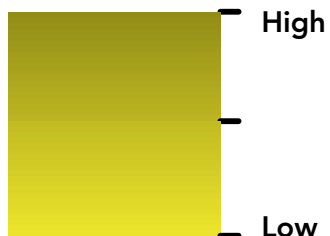
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

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





LifeMode Group: Hometown

Modest Income Homes

12D

Households: 1,627,600

Average Household Size: 2.56

Median Age: 37.0

Median Household Income: \$23,900

WHO ARE WE?

Families in this urban segment may be nontraditional; however, their religious faith and family values guide their modest lifestyles. Many residents are primary caregivers to their elderly family members. Jobs are not always easy to come by, but wages and salary income are the main sources of income for most households. Reliance on Social Security and public assistance income is necessary to support single-parent and multigenerational families. Rents are relatively low (Index 70), public transportation is available, and Medicaid assists families in need.

OUR NEIGHBORHOOD

- Households are single person or single parent (usually female householders). Multigenerational families are also present.
- Homes are predominantly single family; values reflect the age of the housing, built more than 60 years ago.
- Over half of the homes are renter occupied; average rent is lower than the US average.
- Most households have one car (or no vehicle); nearly a third rely on carpooling, walking, biking, or public transportation.

SOCIOECONOMIC TRAITS

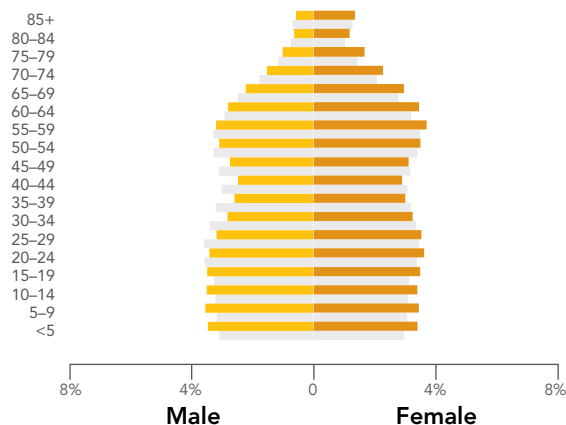
- Almost a quarter of adults aged 25 or more have no high school diploma.
- Labor force participation is 50%.
- Income is less than half of the US median income.
- Consumers in this market consider traditional gender roles and religious faith very important.
- This market lives for today, choosing to save only for a specific purpose.
- Consumers favor TV as their media of choice and will purchase a product with a celebrity endorsement.



AGE BY SEX (Esri data)

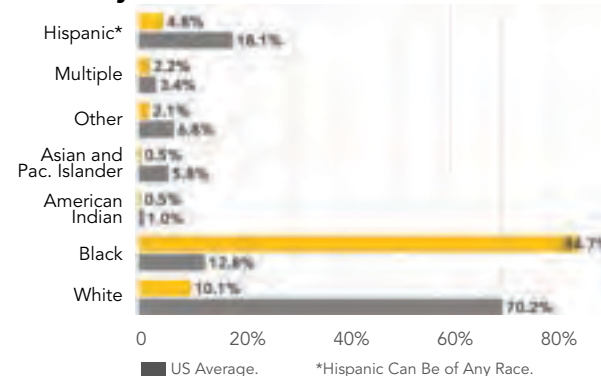
Median Age: **37.0** US: 38.2

■ 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: **34.0** US: 64.0

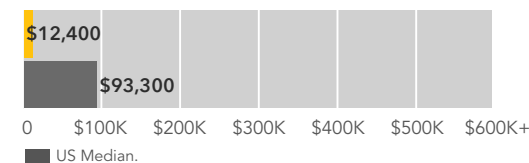
INCOME AND NET WORTH

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

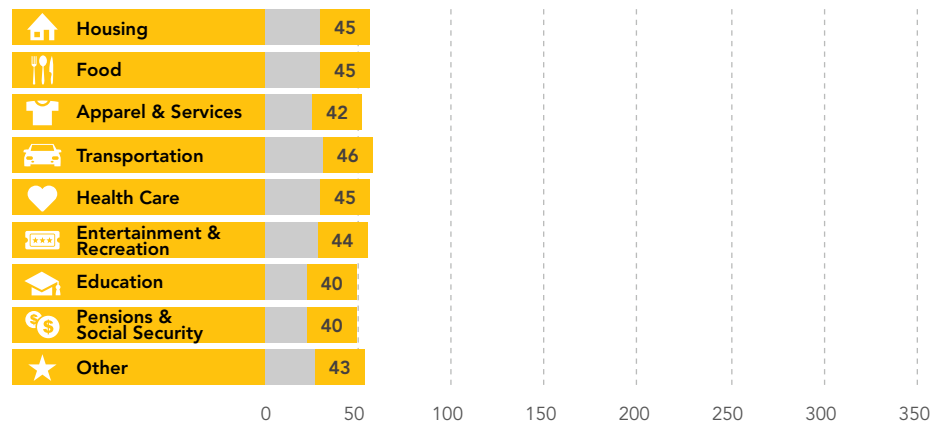


Median Net Worth



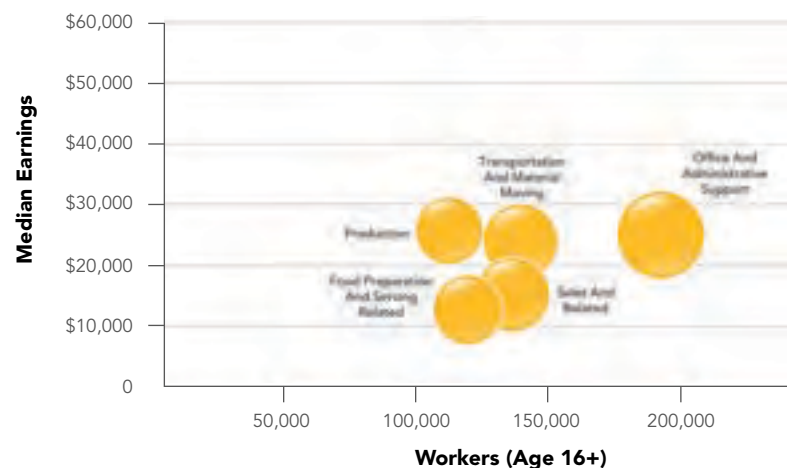
AVERAGE HOUSEHOLD BUDGET INDEX

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.





LifeMode Group: Hometown

Modest Income Homes



TAPESTRY
SEGMENTATION
esri.com/tapestry

MARKET PROFILE

(Consumer preferences are estimated from data by MRI-Simmons.)

- Consumers shop at warehouse clubs and low-cost retailers.
- Unlikely to own a credit card, pay bills in person.
- This market supports multigenerational families, often primary caregivers for elderly family members.
- Listen to gospel and R&B music and prefer to watch BET.
- Enjoy playing and watching basketball.

HOUSING

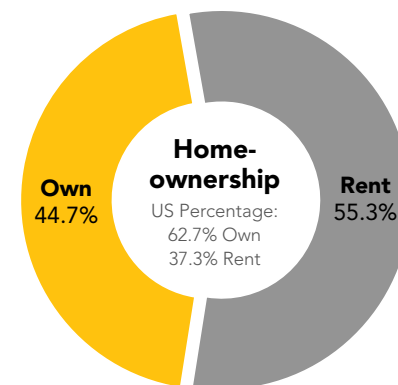
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

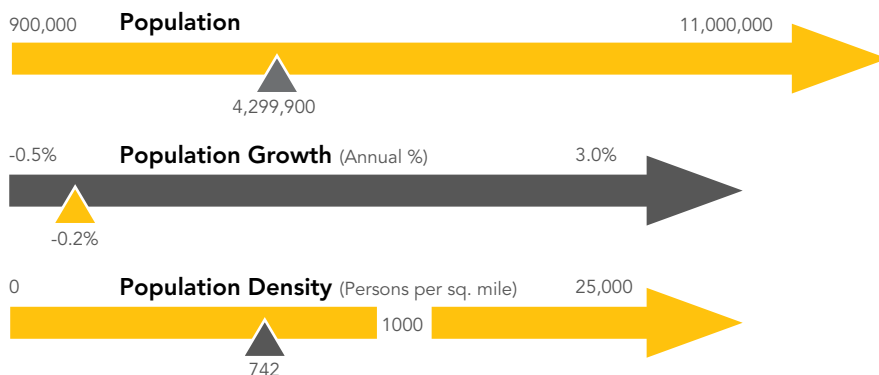
Average Rent:
\$723

US Average: \$1,038



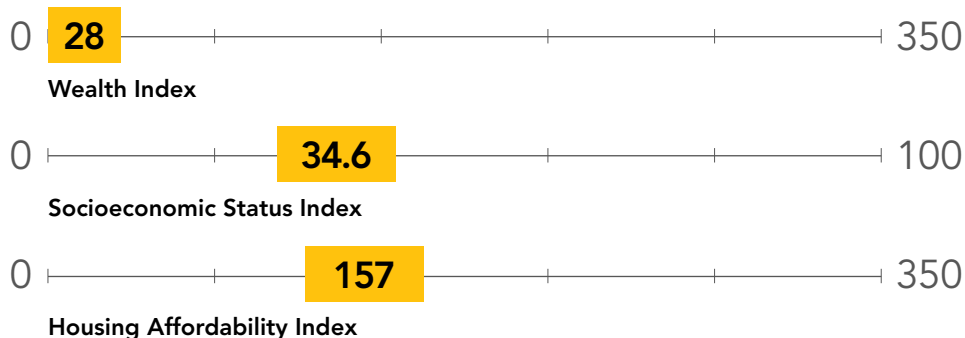
POPULATION CHARACTERISTICS

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.





LifeMode Group: Hometown

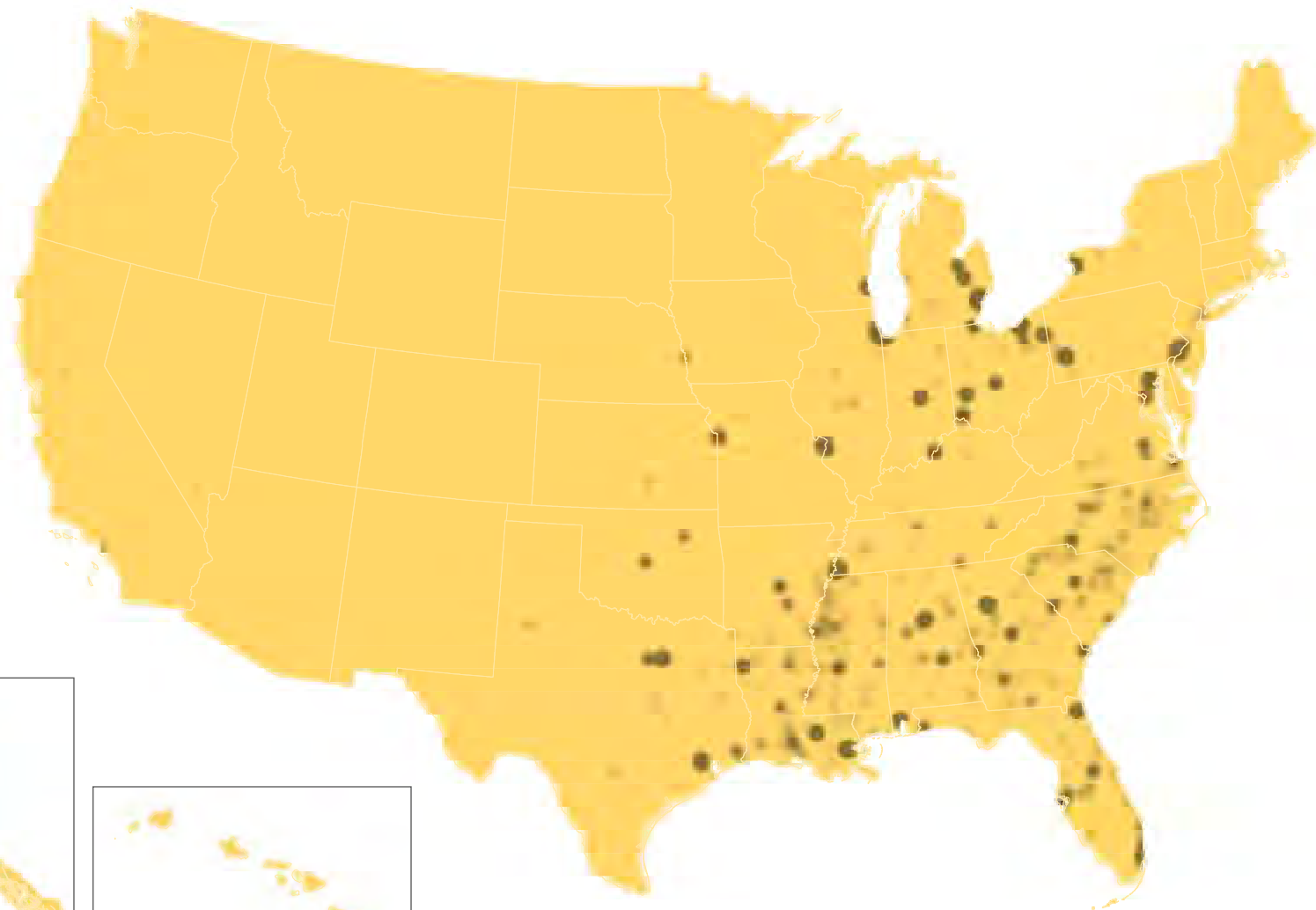
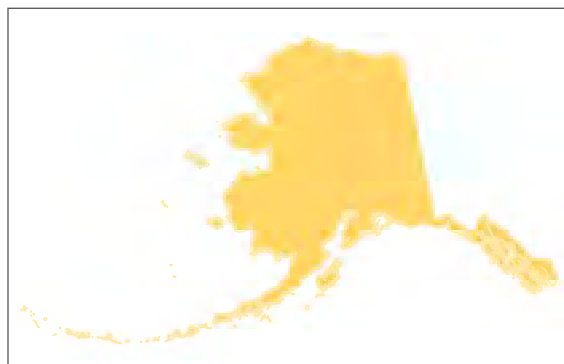
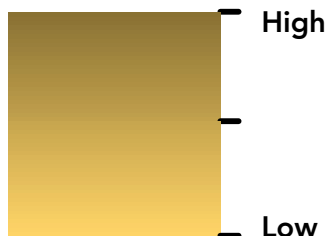
Modest Income Homes



TAPESTRY
SEGMENTATION
esri.com/tapestry

SEGMENT DENSITY

This map illustrates the density and distribution of the *Modest Income Homes* Tapestry Segment by households.



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THE
SCIENCE
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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 is lower than the US (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

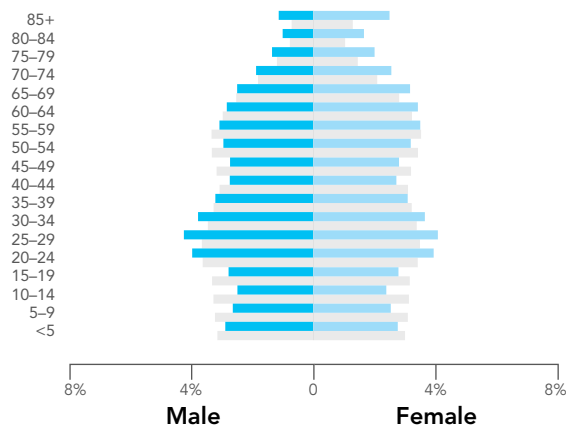
- An average labor force participation rate of 62.6%, despite the increasing number of retired workers.
- 32% of households are currently receiving income from Social Security.
- 31% have a college degree (Index 99), 33% have some college education (Index 114), 9% are still enrolled in college (Index 121).
- Consumers are price aware and coupon clippers but open to impulse buys.
- They are attentive to environmental concerns.
- They are comfortable with the latest technology.



AGE BY SEX (Esri data)

Median Age: **39.4** US: 38.2

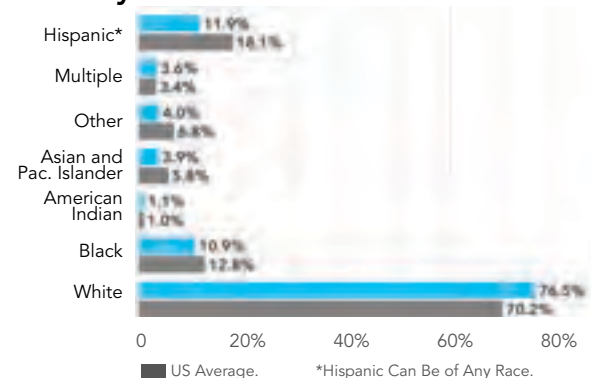
■ Indicates US



RACE AND ETHNICITY (Esri data)

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Diversity Index: **52.7** US: 64.0



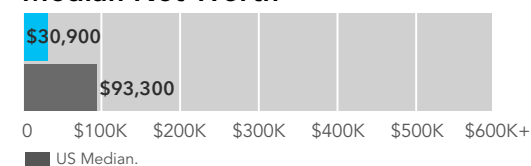
INCOME AND NET WORTH

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

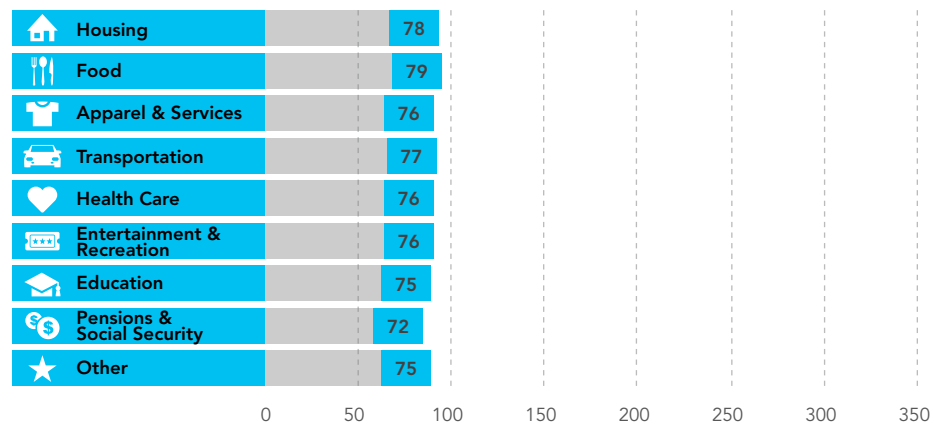


Median Net Worth



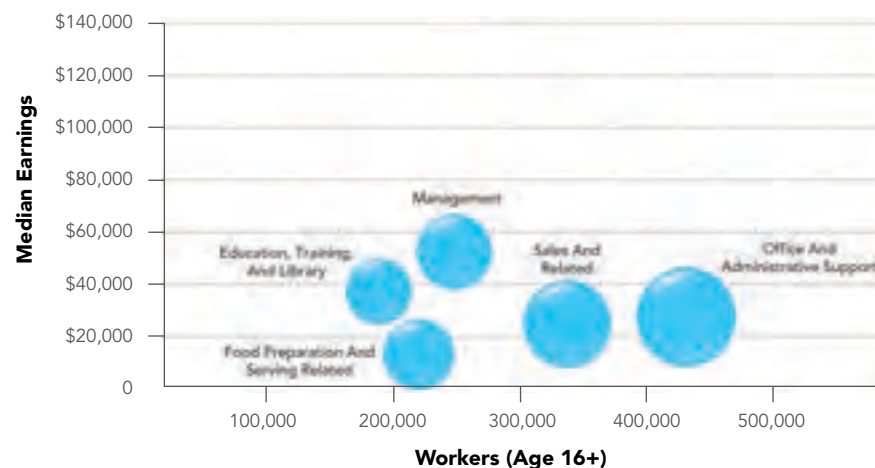
AVERAGE HOUSEHOLD BUDGET INDEX

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OCCUPATION BY EARNINGS

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





MARKET PROFILE (Consumer preferences are estimated from data by MRI-Simmons.)

- Residents have a strong sense of community. They volunteer for charities, help fundraise, 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

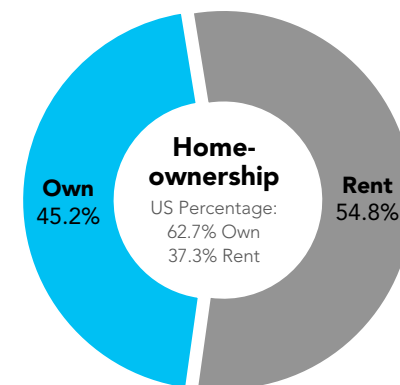
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Typical Housing:
Single Family;
Multi-Units

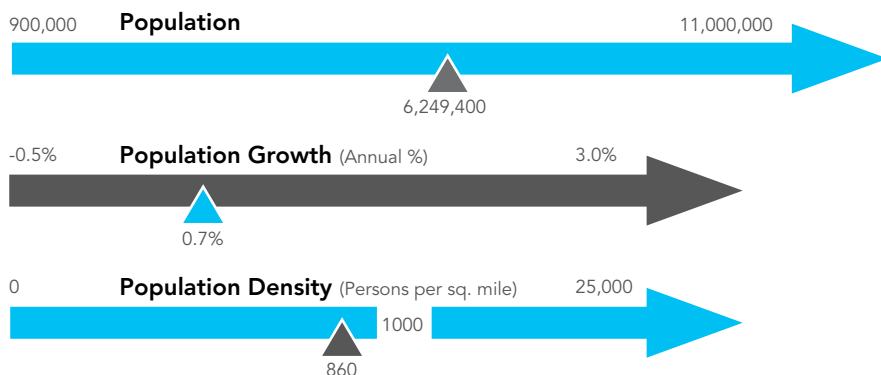
Average Rent:
\$880

US Average: \$1,038



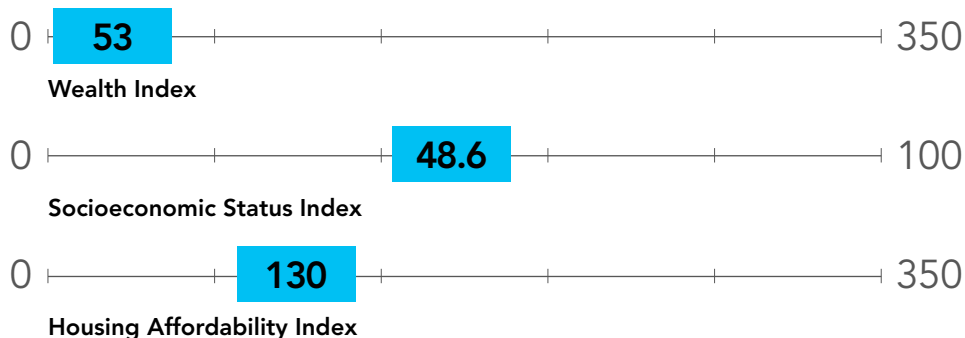
POPULATION CHARACTERISTICS

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ESRI INDEXES

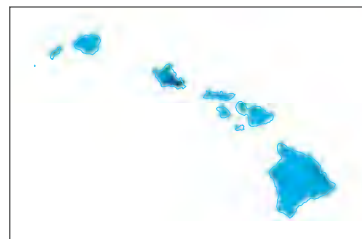
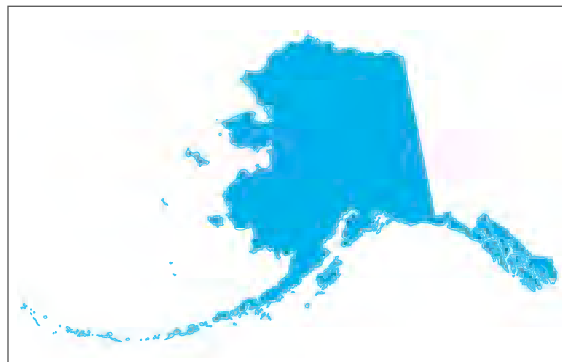
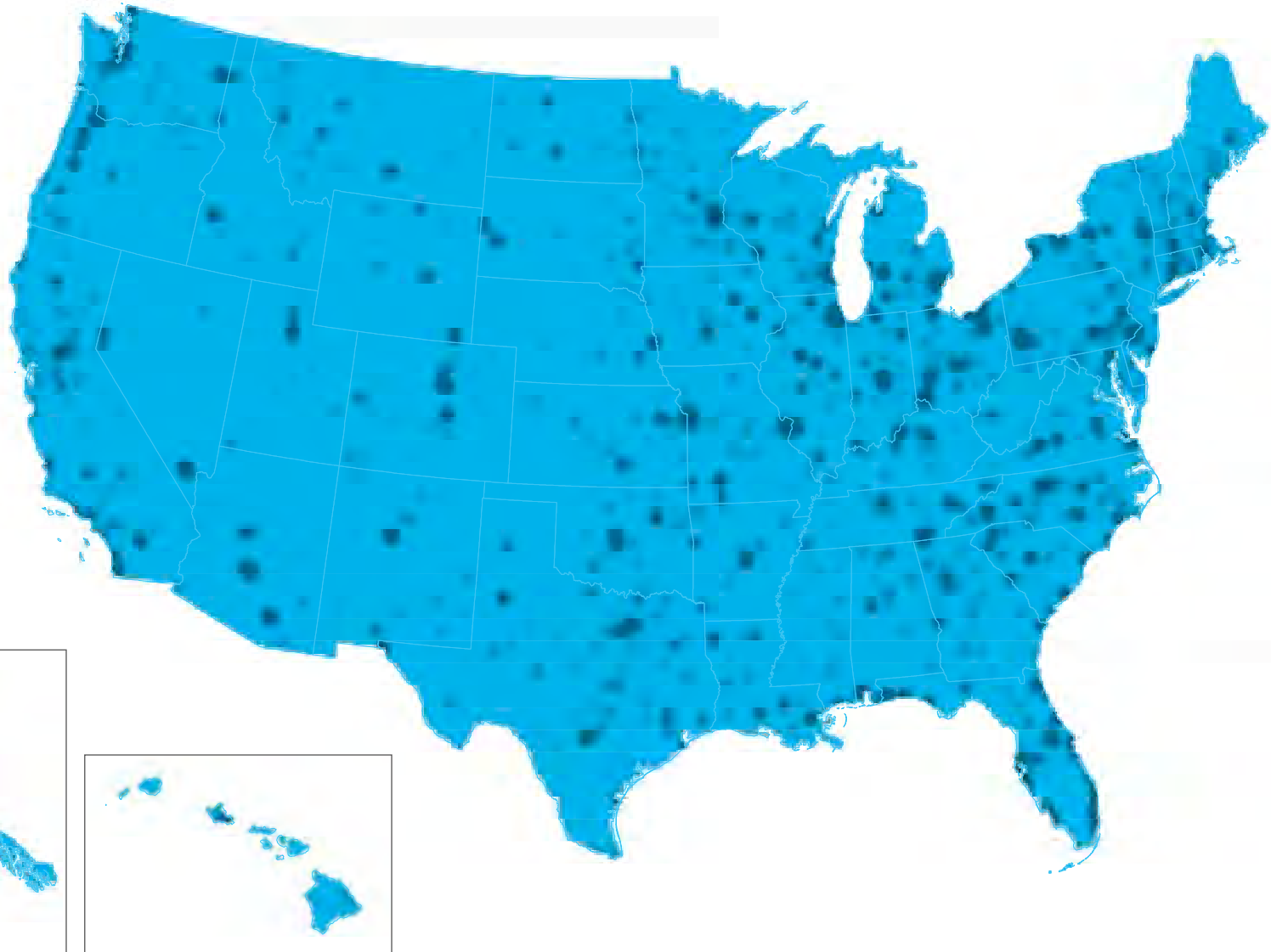
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

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





LifeMode Group: Hometown

Small Town Sincerity

12C

Households: 2,305,700

Average Household Size: 2.26

Median Age: 40.8

Median Household Income: \$31,500

WHO ARE WE?

Small Town Sincerity includes young families and senior householders that are bound by community ties. The lifestyle is down-to-earth and semirural, with television for entertainment and news, and emphasis on convenience for both young parents and senior citizens. Residents embark on pursuits including online computer games, renting movies, indoor gardening, and rural activities like hunting and fishing. Residents keep their finances simple—paying bills in person and avoiding debt.

OUR NEIGHBORHOOD

- Reside in small towns or semirural neighborhoods, mostly outside metropolitan areas.
- Homes are a mix of older single-family houses (61%), apartments, and mobile homes.
- Half of all homes are owner occupied (Index 79).
- Median home value of \$92,300 is about half the US median.
- Average rent is \$639 (Index 62).
- This is an older market, with half of the householders aged 55 years or older and predominantly single-person households (Index 139).

SOCIOECONOMIC TRAITS

- Education: 67% with high school diploma or some college.
- Labor force participation lower at 52% (Index 83), which could result from lack of jobs or retirement.
- Income from wages and salaries (Index 83), Social Security (Index 133) or retirement (Index 106), increased by Supplemental Security Income (Index 183).
- Price-conscious consumers that shop accordingly, with coupons at discount centers.
- Connected, but not to the latest or greatest gadgets; keep their landlines.
- Community-oriented residents; more conservative than middle of the road.
- Rely on television or newspapers to stay informed.



LifeMode Group: Hometown

Small Town Sincerity

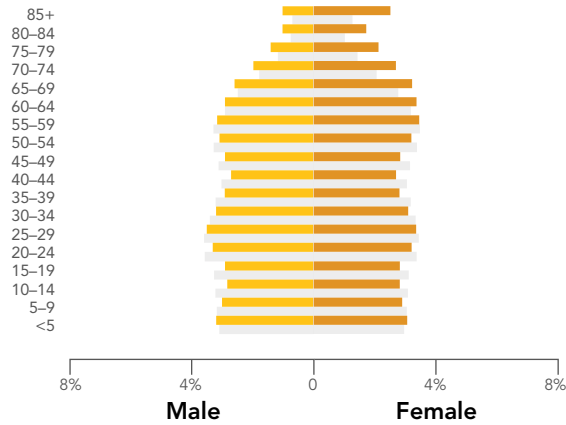


TAPESTRY
SEGMENTATION
esri.com/tapestry

AGE BY SEX (Esri data)

Median Age: **40.8** US: 38.2

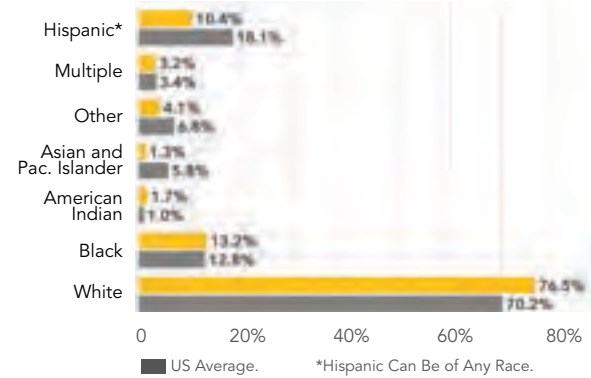
■ Indicates US



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: **51.0** US: 64.0



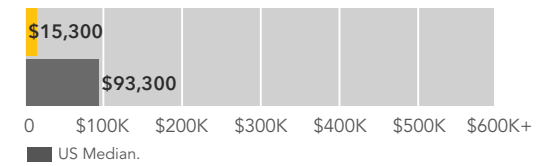
INCOME AND NET WORTH

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

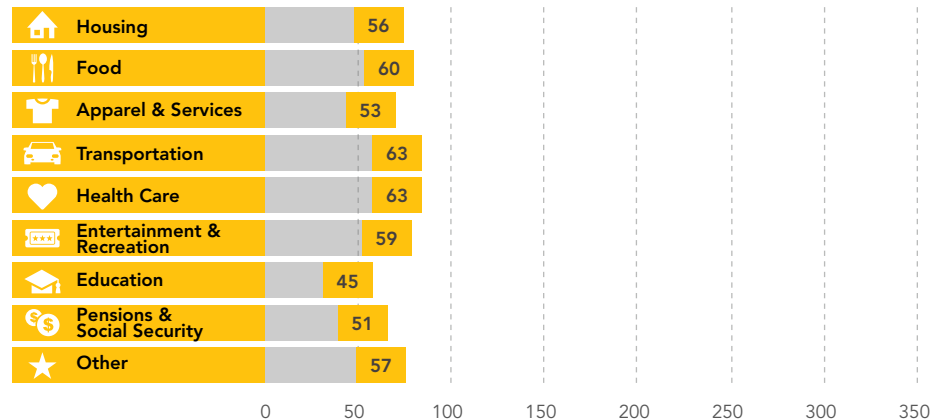


Median Net Worth



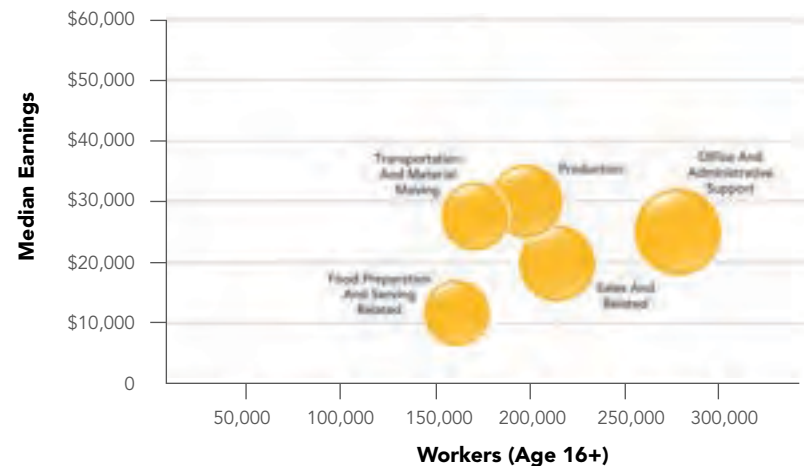
AVERAGE HOUSEHOLD BUDGET INDEX

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.





LifeMode Group: Hometown

Small Town Sincerity



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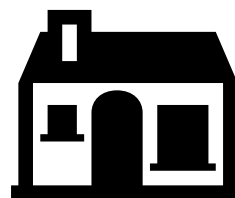
MARKET PROFILE

(Consumer preferences are estimated from data by MRI-Simmons.)

- Small Town Sincerity features a semirural lifestyle, complete with domestic trucks and SUVs, ATVs, and vegetable gardens.
- Residents enjoy outdoor activities like hunting and fishing as well as watching NASCAR and college football and basketball on TV.
- A large senior population visit doctors and health practitioners regularly.
- A largely single population favors convenience over cooking—frozen meals and fast food.
- Home improvement is not a priority, but vehicle maintenance is.

HOUSING

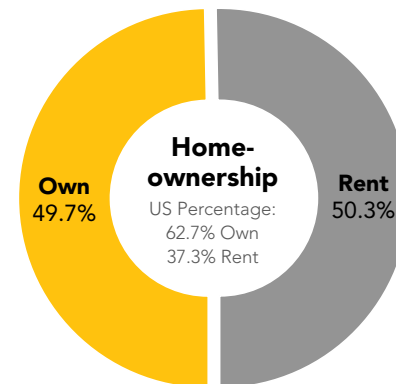
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

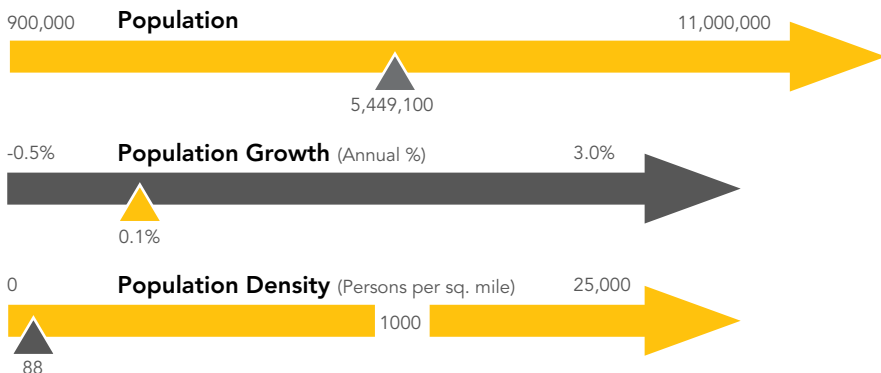
Median Value:
\$92,300

US Median: \$207,300



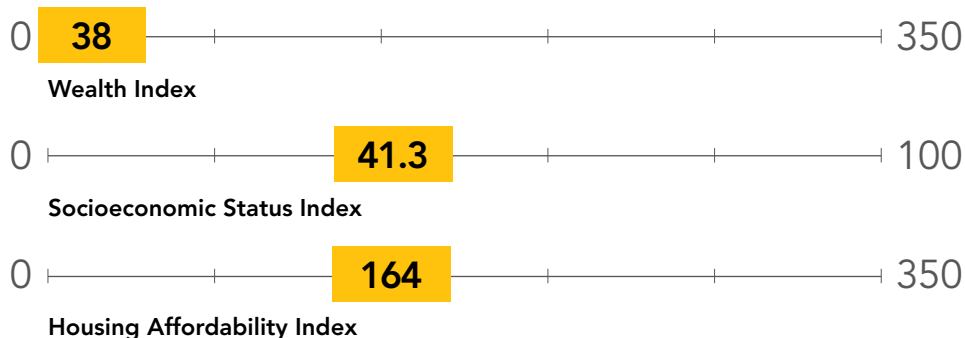
POPULATION CHARACTERISTICS

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: Hometown

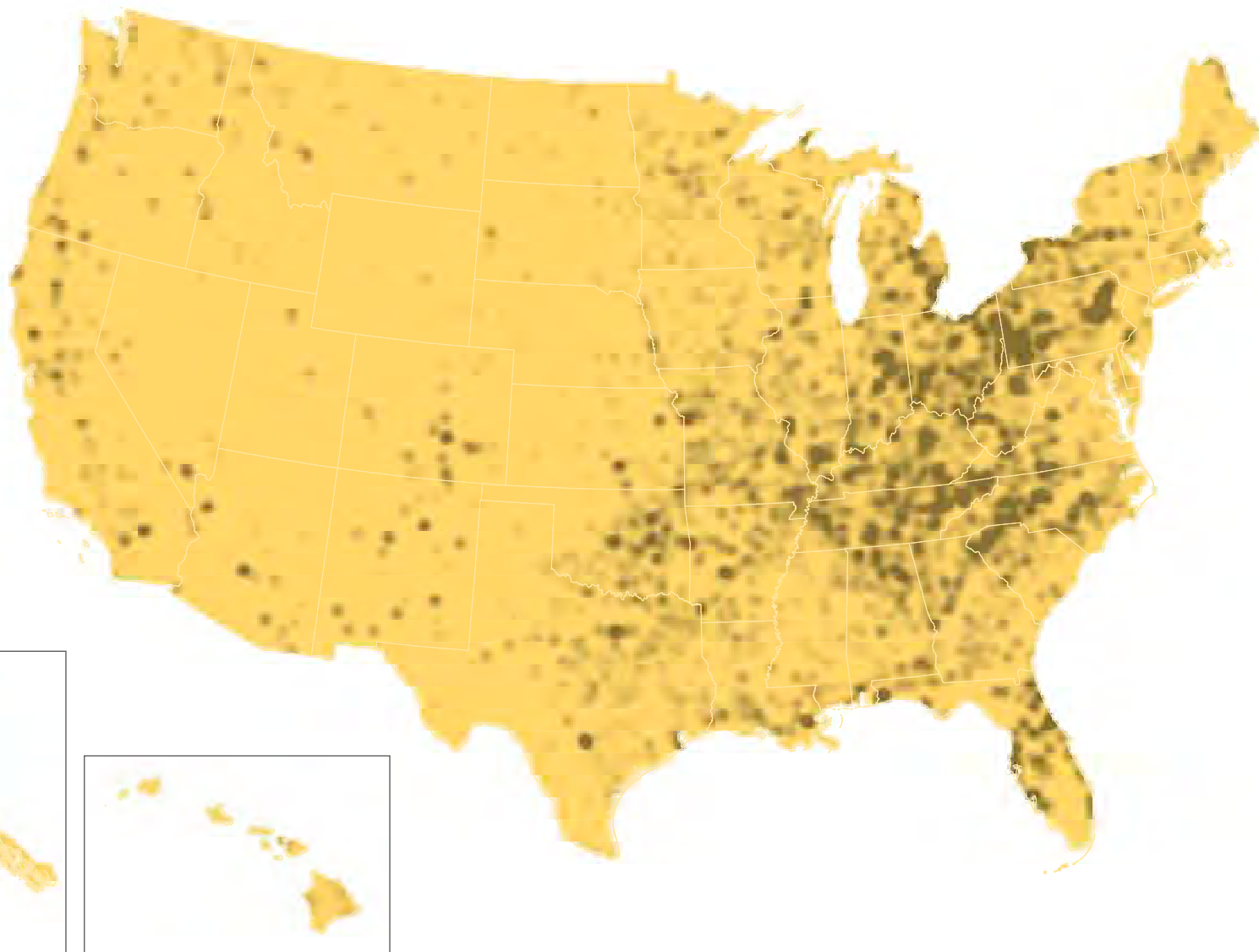
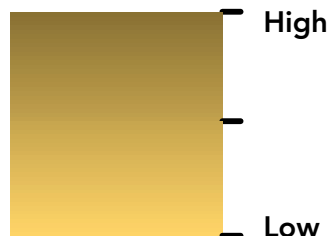
Small Town Sincerity



TAPESTRY
SEGMENTATION
esri.com/tapestry

SEGMENT DENSITY

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



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LifeMode Group: Affluent Estates

Top Tier

1A

Households: 2,113,000

Average Household Size: 2.84

Median Age: 47.3

Median Household Income: \$173,200

WHO ARE WE?

The residents of the wealthiest Tapestry market, *Top Tier*, earn more than three times the US household income. They have the purchasing power to indulge any choice, but what do their hearts' desire? Aside from the obvious expense for the upkeep of their lavish homes, consumers select upscale salons, spas, and fitness centers for their personal well-being and shop at high-end retailers for their personal effects. Whether short or long, domestic or foreign, their frequent vacations spare no expense. Residents fill their weekends and evenings with opera, classical music concerts, charity dinners, and shopping. These highly educated professionals have reached their corporate career goals. With an accumulated average net worth of over US\$3 million dollars and income from a strong investment portfolio, many of these older residents have moved into consulting roles or operate their own businesses.



OUR NEIGHBORHOOD

- Married couples without children or married couples with older children dominate this market.
- Housing units are owner occupied with the highest home values—and above-average use of mortgages.
- Neighborhoods are older and located in the suburban periphery of the largest metropolitan areas, especially along the coasts.

SOCIOECONOMIC TRAITS

- *Top Tier* is a highly educated, successful consumer market: more than one in three residents has a postgraduate degree.
- Annually, they earn more than three times the US median household income, primarily from wages and salary but also self-employment income (Index 177) and investments (Index 251).
- These are the nation's wealthiest consumers. They hire financial advisers to manage their diverse investment portfolios but stay abreast of current financial trends and products.
- Socially responsible consumers who aim for a balanced lifestyle, they are goal oriented and hardworking but make time for their kids or grandkids and maintain a close-knit group of friends.
- These busy consumers seek variety in life. They take an interest in the fine arts; read to expand their knowledge; and consider the internet, radio, and newspapers as key media sources.
- They regularly cook their meals at home, attentive to good nutrition and fresh organic foods.

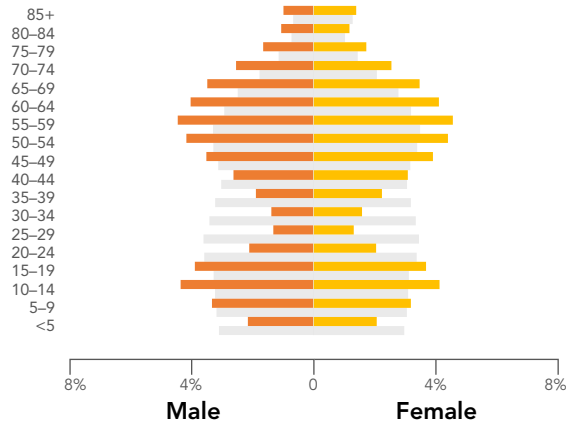
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.



AGE BY SEX (Esri data)

Median Age: 47.3 US: 38.2

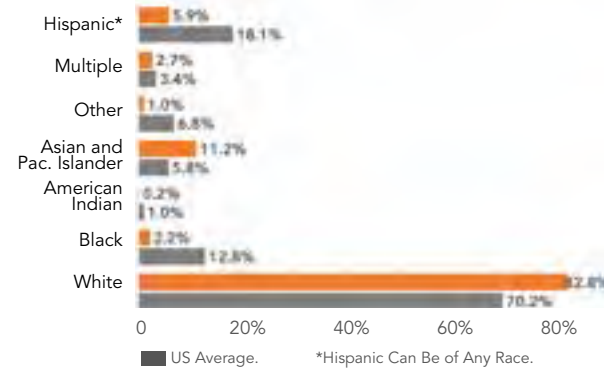
■ Indicates US



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: 37.9 US: 64.0



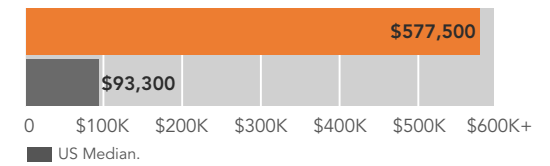
INCOME AND NET WORTH

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

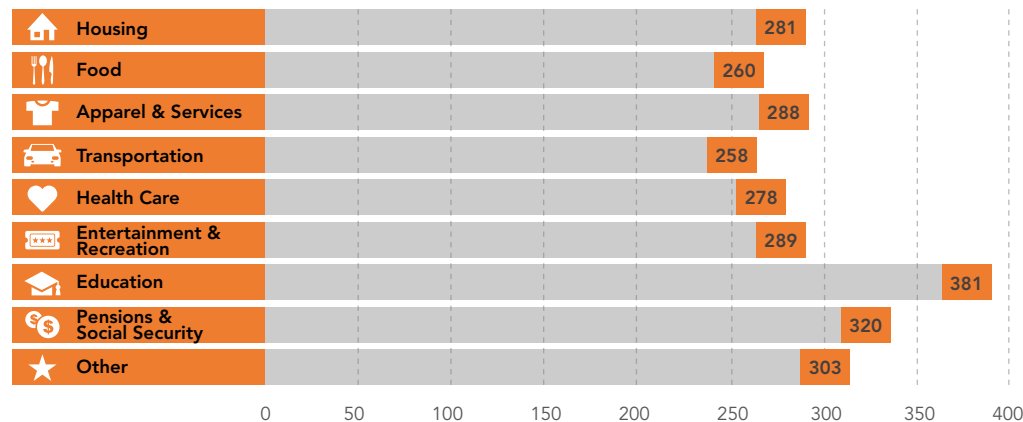


Median Net Worth



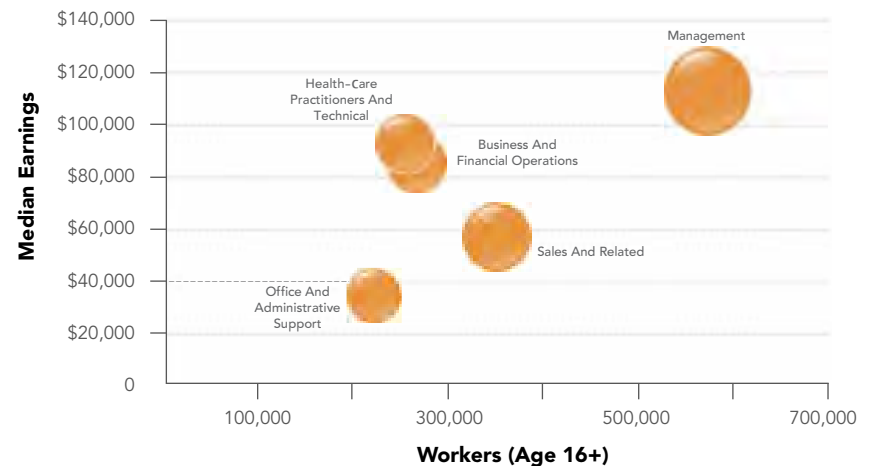
AVERAGE HOUSEHOLD BUDGET INDEX

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 MRI-Simmons.)

- Purchase or lease luxury cars with the latest trim, preferably imports.
- Contribute to arts/cultural organizations, educational and social groups, as well as NPR and PBS.
- Use every service from property and garden maintenance and professional housekeeping to contracting for home improvement or maintenance projects.
- Consumers spend money on themselves; they frequently visit day spas and salons, use dry cleaning services, and exercise at exclusive clubs.
- Near or far, downtown or at the beach, they regularly visit their lavish vacation homes.
- When at home, their schedules are packed with lunch dates, book club meetings, charity dinners, classical music concerts, opera shows, and visits to local art galleries.
- Mostly shop at high-end retailers such as Nordstrom (readily paying full price), as well as Target, Kohl's, Macy's, and Bed Bath & Beyond, and online at Amazon.com.
- At their level of spending, it makes sense to own an airline credit card. They make several domestic and foreign trips a year for leisure and pay for every luxury along the way—a room with a view, limousines, and rental cars are part of the package.

HOUSING

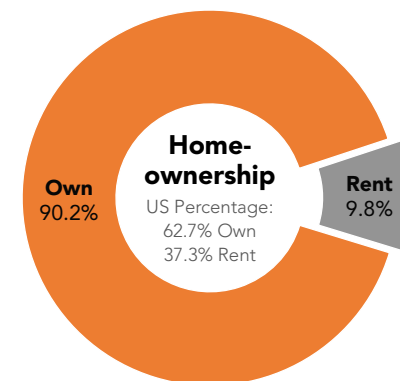
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

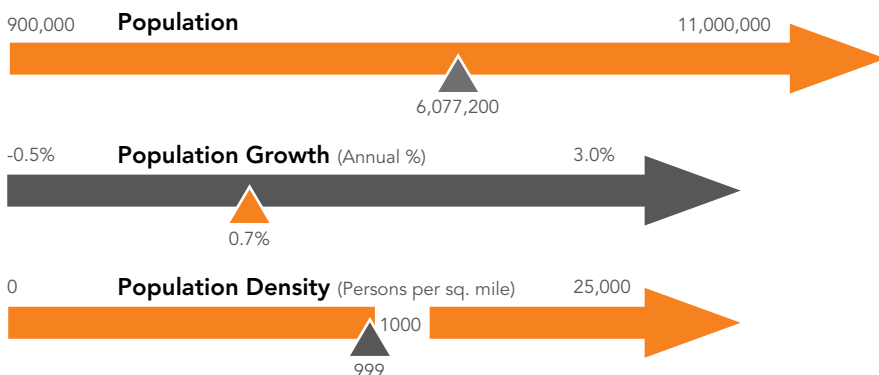
Median Value:
\$819,500

US Median: \$207,300



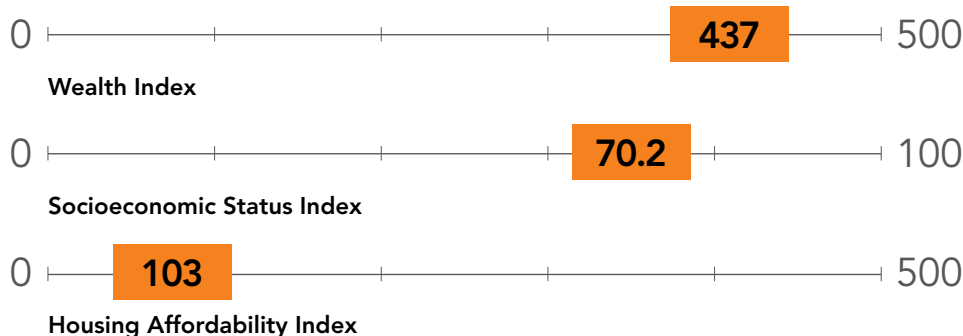
POPULATION CHARACTERISTICS

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

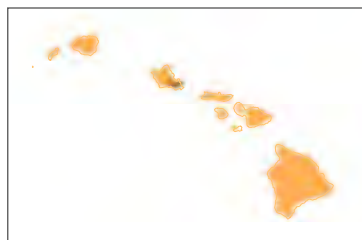
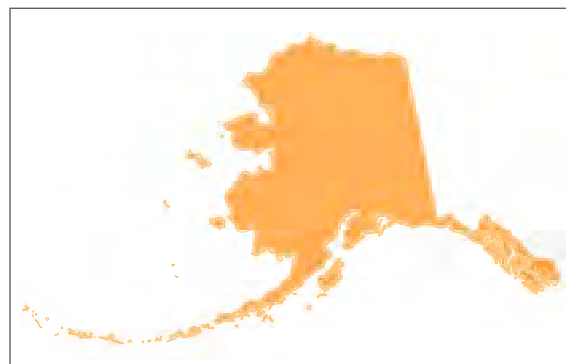
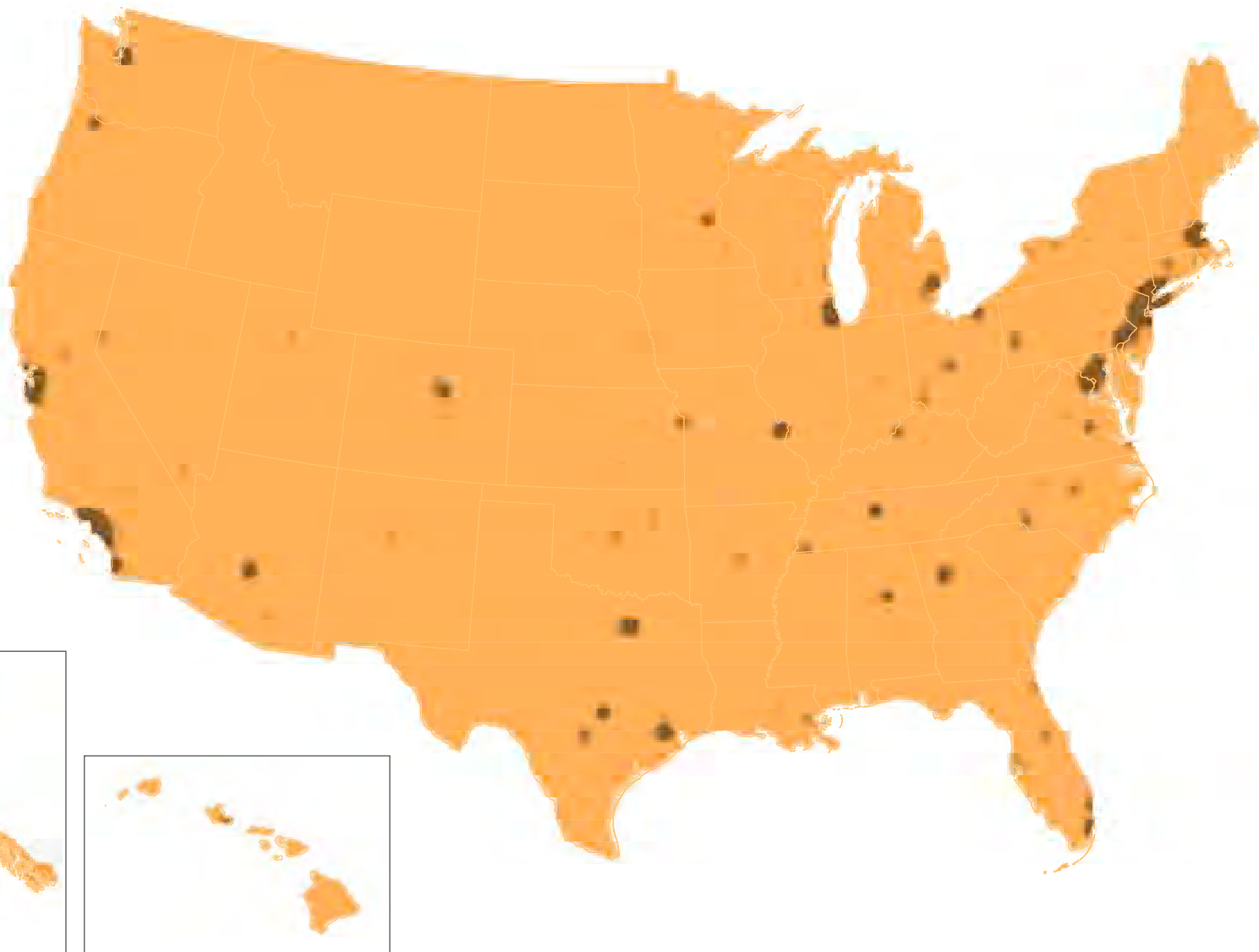
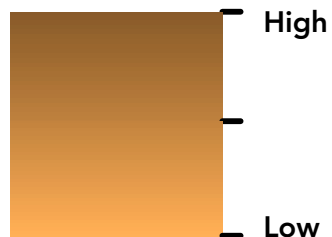
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *Top Tier* Tapestry Segment by households.





LifeMode Group: Hometown

Traditional Living

12B

Households: 2,395,200

Average Household Size: 2.51

Median Age: 35.5

Median Household Income: \$39,300

WHO ARE WE?

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

OUR NEIGHBORHOOD

- Married couples are the dominant household type, but fewer than expected from the younger age profile and fewer with children (Index 79); however, there are higher proportions of single-parent (Index 146) and single-person households (Index 112).
- Average household size is slightly lower at 2.51.
- Homes are primarily single family or duplexes in older neighborhoods, built before 1940 (Index 228).
- Most neighborhoods are located in lower-density urban clusters of metro areas throughout the Midwest and South.
- Average commuting time to work is very short (Index 22).
- Households have one or two vehicles.

SOCIOECONOMIC TRAITS

- Over 70% have completed high school or some college.
- Labor force participation is a bit higher than the national rate at 63.4%.
- Almost three-quarters of households derive income from wages and salaries, augmented by Supplemental Security Income (Index 139) and public assistance (Index 152).
- Cost-conscious consumers that are comfortable with brand loyalty, unless the price is too high.
- Connected and comfortable with the internet, more likely to participate in online gaming or posting pics on social media.
- TV is seen as the most trusted media.



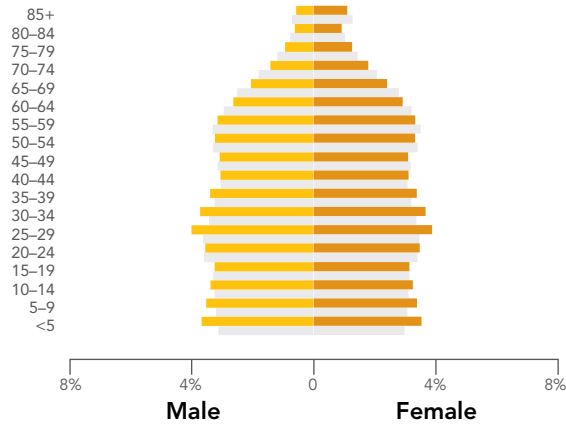
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.



AGE BY SEX (Esri data)

Median Age: 35.5 US: 38.2

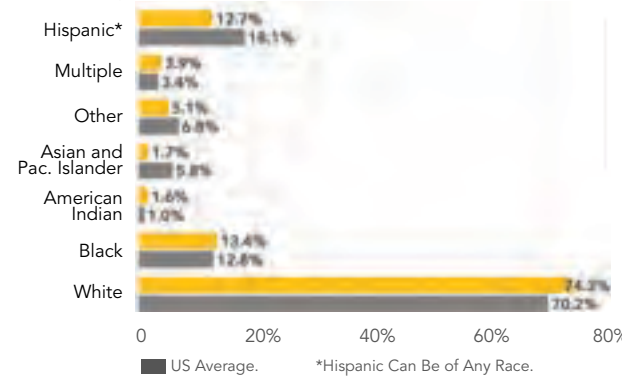
■ Indicates US



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: 55.6 US: 64.0



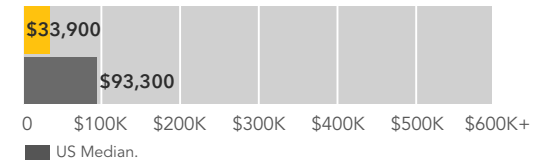
INCOME AND NET WORTH

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

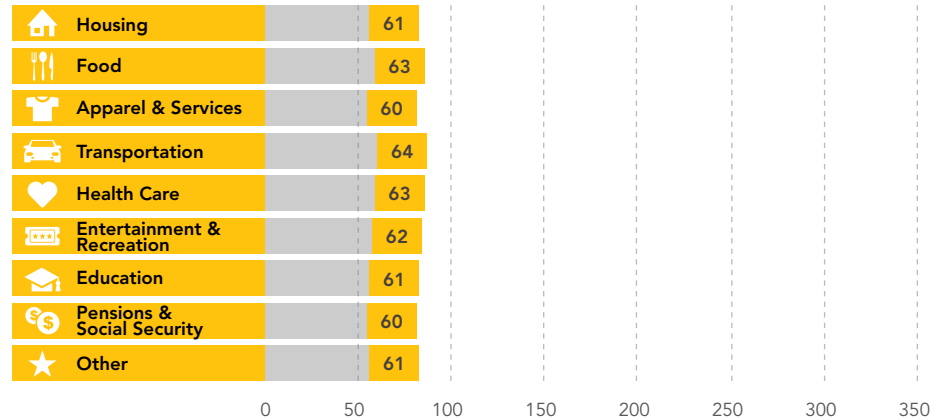


Median Net Worth



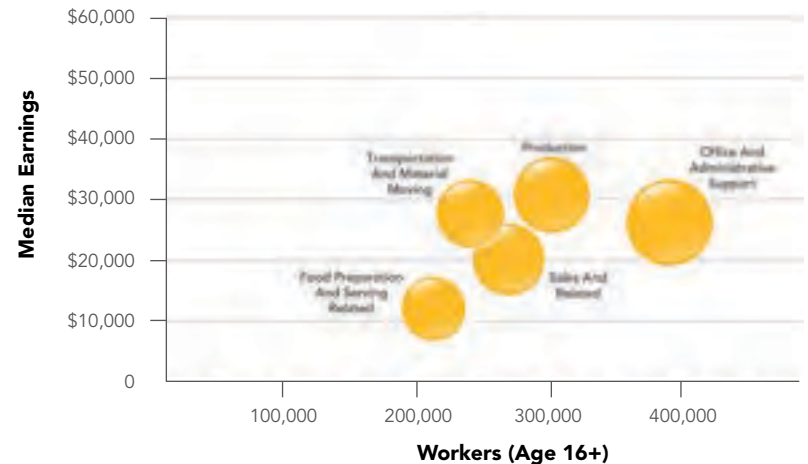
AVERAGE HOUSEHOLD BUDGET INDEX

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 MRI-Simmons.)

- Shop for groceries at discount stores such as Walmart Supercenters.
- Convenience stores are commonly used for fuel or picking up incidentals.
- Tend to carry credit card balances, have personal loans, and pay bills in person.
- Half of households have abandoned landlines for cell phones only.
- Favorite TV channels include Freedom, CMT, and Game Show Network.
- Fast-food devotees.
- Enjoy outdoor activities such as fishing and taking trips to the zoo.

HOUSING

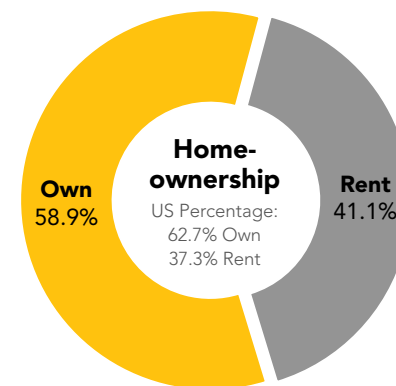
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

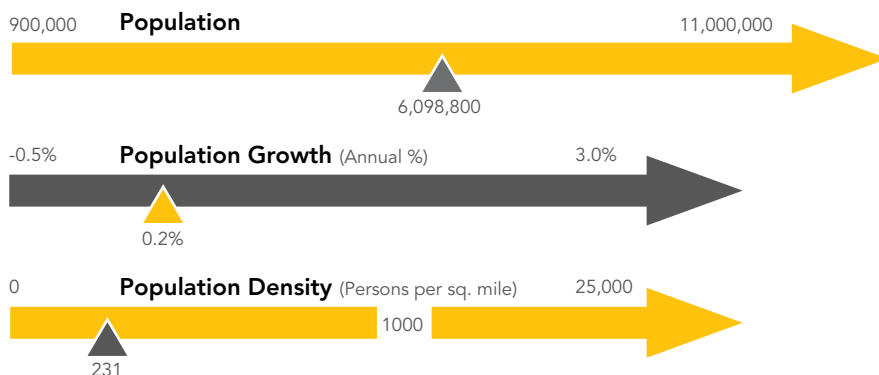
Median Value:
\$83,200

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: Hometown

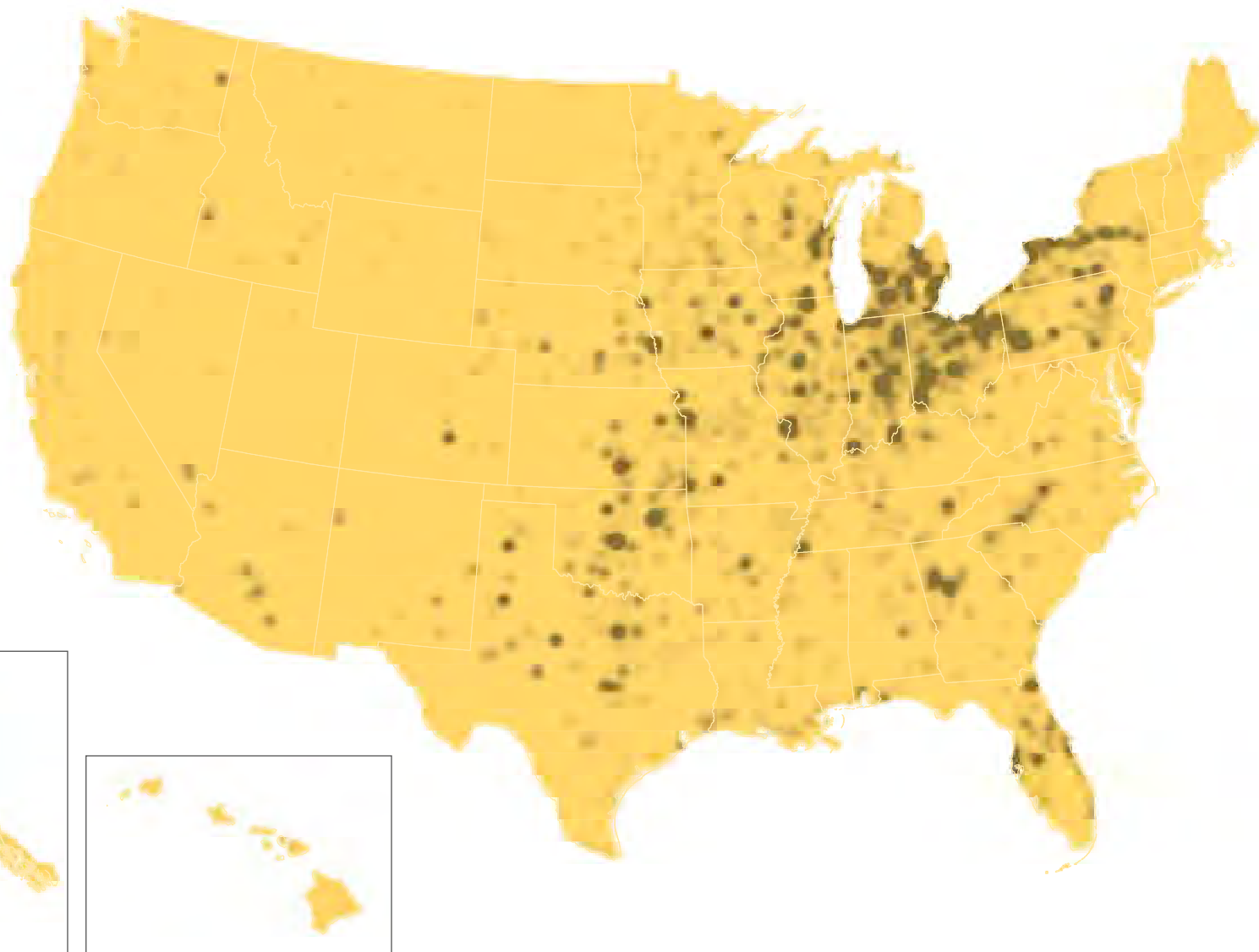
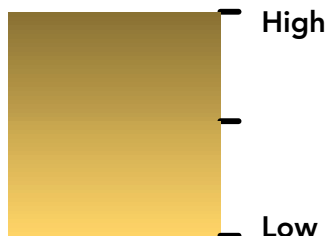
Traditional Living



TAPESTRY
SEGMENTATION
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SEGMENT DENSITY

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



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LifeMode Group: Upscale Avenues

Urban Chic

2A

Households: 1,635,200

Average Household Size: 2.39

Median Age: 43.3

Median Household Income: \$109,400

WHO ARE WE?

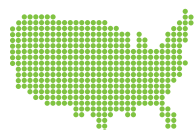
Urban Chic residents are professionals that live a sophisticated, exclusive lifestyle. Half of all households are occupied by married-couple families and about 30% are singles. These are busy, well-connected, and well-educated consumers—avid readers and moviegoers, environmentally active, and financially stable. This market is a bit older, with a median age of 43 years, and growing slowly, but steadily.

OUR NEIGHBORHOOD

- More than half of *Urban Chic* households include married couples; nearly 30% are singles.
- Average household size is slightly lower at 2.39.
- Homes range from prewar to recent construction, high-rise to single family. Over 60% of householders live in single-family homes; more than one in four live in multiunit structures.
- Two-thirds of homes are owner occupied.
- Major concentrations of these neighborhoods are found in the suburban periphery of large metropolitan areas on the California coast and along the East Coast.
- Most households have two vehicles available. Commuting time is slightly longer, but commuting by bicycle is common (Index 252).

SOCIOECONOMIC TRAITS

- Well educated, more than 65% of residents hold a bachelor's degree or higher (Index 212).
- Labor force participation is higher at 68%.
- Residents are employed in white-collar occupations—in managerial, technical, and legal positions.
- Nearly 40% of households receive income from investments.
- Environmentally aware, residents actively recycle and maintain a “green” lifestyle.
- These busy, tech-savvy residents use PCs extensively for an array of activities such as shopping, banking, and staying current—a top market for Apple computers.



TAPESTRY
SEGMENTATION
esri.com/tapestry

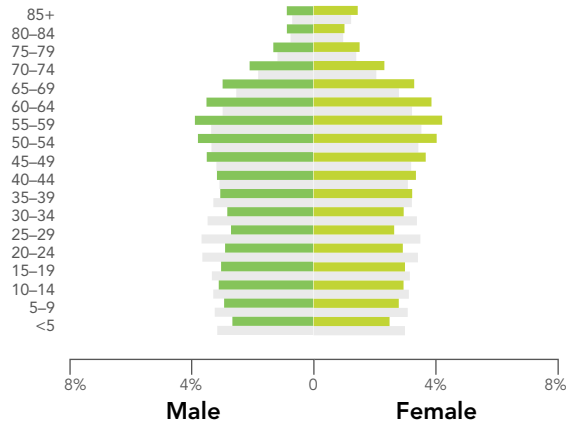
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.



AGE BY SEX (Esri data)

Median Age: **43.3** US: 38.2

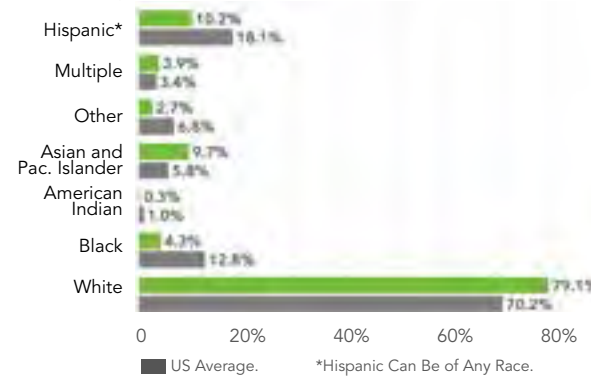
■ Indicates US



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: **48.1** US: 64.0



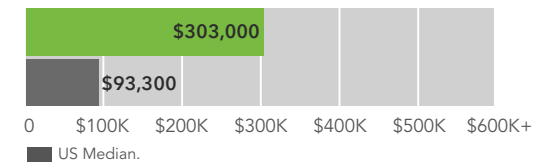
INCOME AND NET WORTH

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

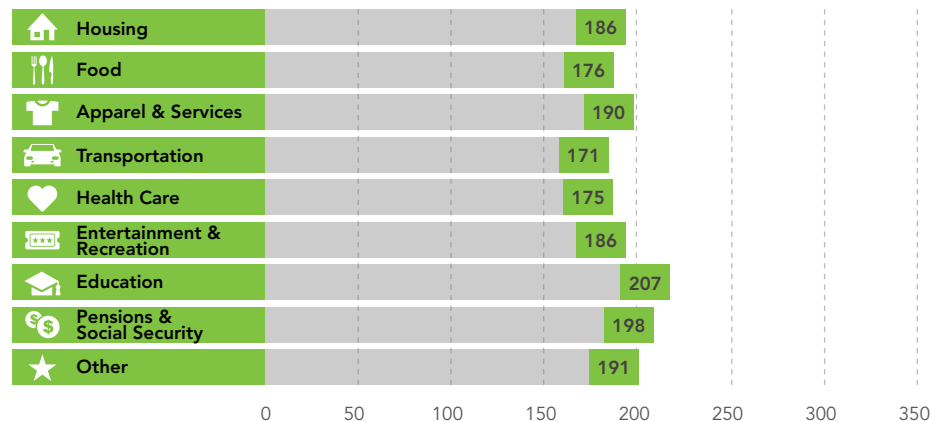


Median Net Worth



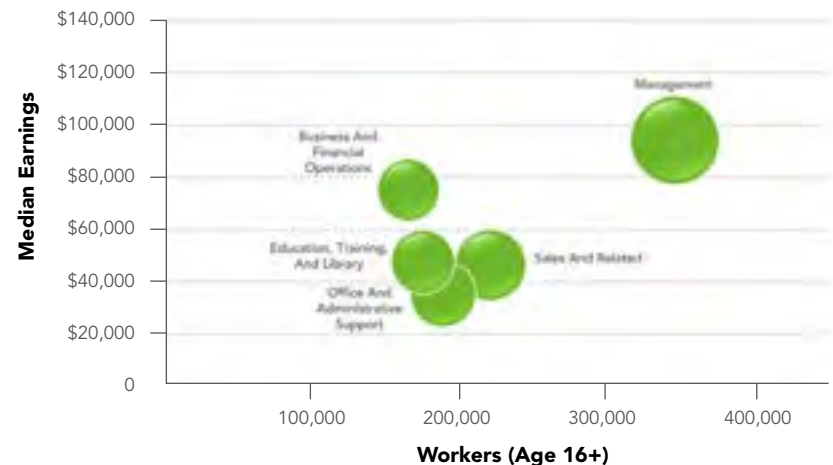
AVERAGE HOUSEHOLD BUDGET INDEX

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OCCUPATION BY EARNINGS

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





MARKET PROFILE

(Consumer preferences are estimated from data by MRI-Simmons.)

- Shop at Trader Joe's, Costco, or Whole Foods.
- Eat organic foods, drink imported wine, and truly appreciate a good cup of coffee.
- Travel extensively (domestically and internationally).
- Prefer to drive luxury imports and shop at upscale establishments.
- Embrace city life by visiting museums, art galleries, and movie theaters for a night out.
- Avid book readers of both digital and audio formats.
- Financially shrewd residents that maintain a healthy portfolio of stocks, bonds, and real estate.
- In their downtime, enjoy activities such as skiing, yoga, hiking, and tennis.

HOUSING

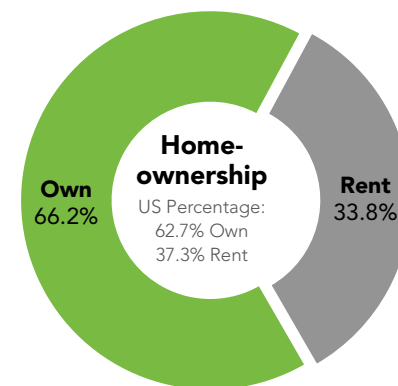
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Typical Housing:
Single Family

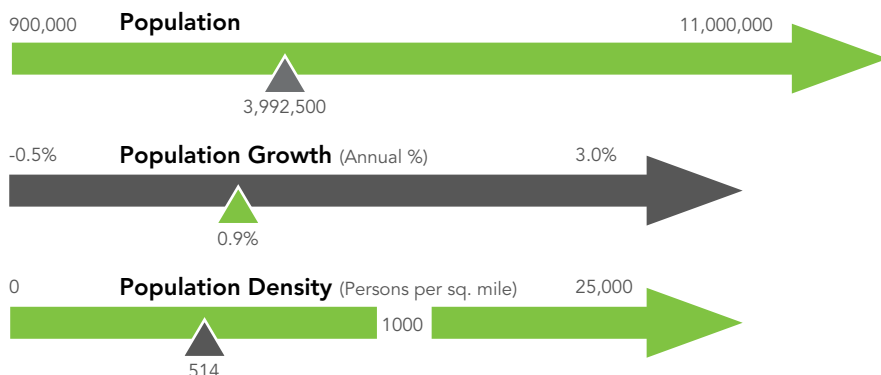
Median Value:
\$623,400

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

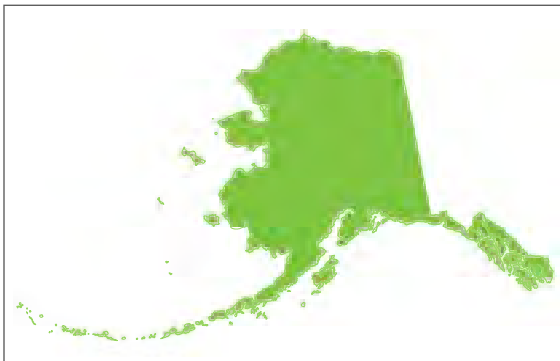
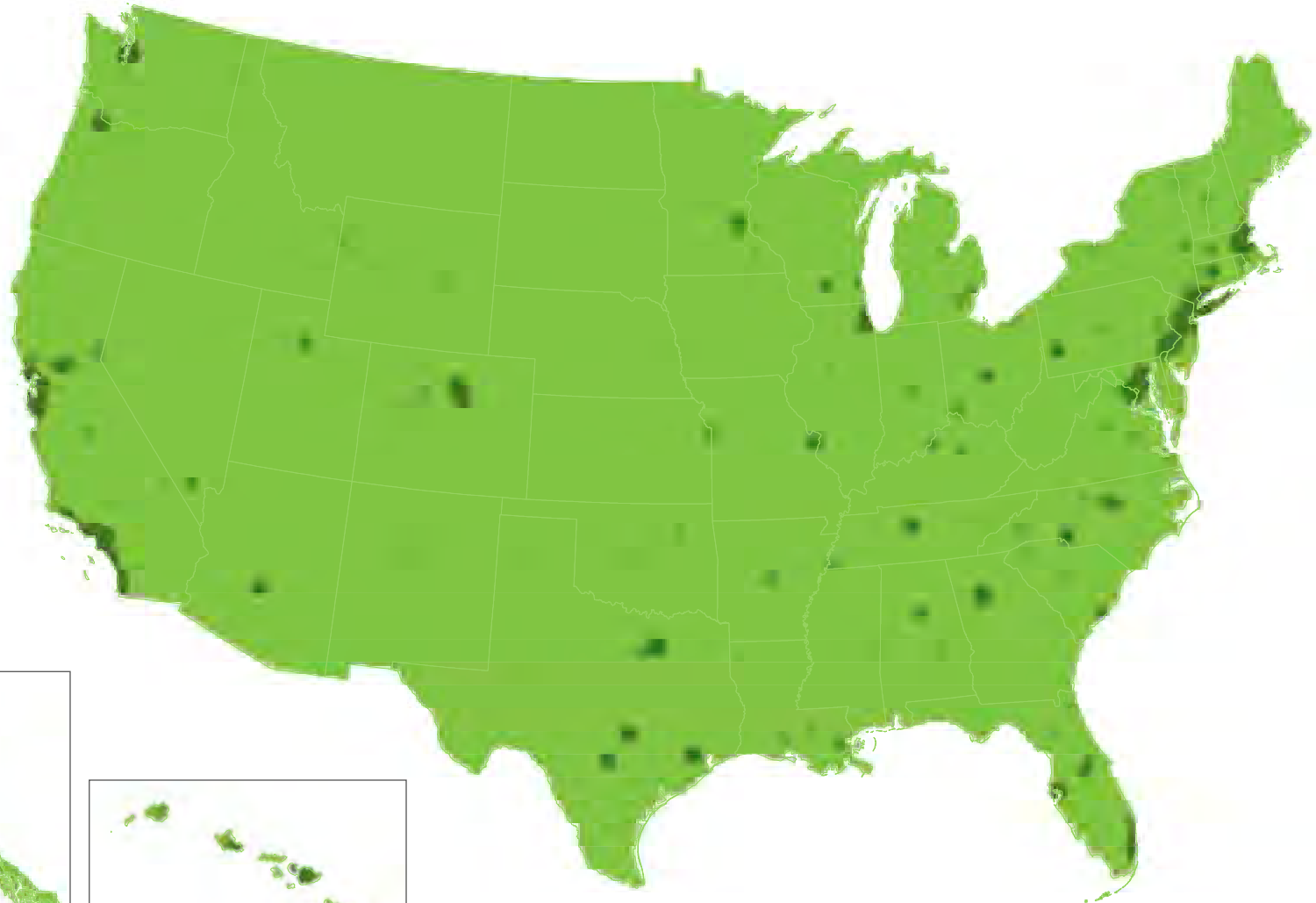
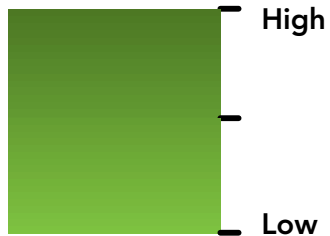
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *Urban Chic* Tapestry Segment by households.





LifeMode Group: Affluent Estates

Top Tier

1A

Households: 2,113,000

Average Household Size: 2.84

Median Age: 47.3

Median Household Income: \$173,200

WHO ARE WE?

The residents of the wealthiest Tapestry market, *Top Tier*, earn more than three times the US household income. They have the purchasing power to indulge any choice, but what do their hearts' desire? Aside from the obvious expense for the upkeep of their lavish homes, consumers select upscale salons, spas, and fitness centers for their personal well-being and shop at high-end retailers for their personal effects. Whether short or long, domestic or foreign, their frequent vacations spare no expense. Residents fill their weekends and evenings with opera, classical music concerts, charity dinners, and shopping. These highly educated professionals have reached their corporate career goals. With an accumulated average net worth of over US\$3 million dollars and income from a strong investment portfolio, many of these older residents have moved into consulting roles or operate their own businesses.



OUR NEIGHBORHOOD

- Married couples without children or married couples with older children dominate this market.
- Housing units are owner occupied with the highest home values—and above-average use of mortgages.
- Neighborhoods are older and located in the suburban periphery of the largest metropolitan areas, especially along the coasts.

SOCIOECONOMIC TRAITS

- *Top Tier* is a highly educated, successful consumer market: more than one in three residents has a postgraduate degree.
- Annually, they earn more than three times the US median household income, primarily from wages and salary but also self-employment income (Index 177) and investments (Index 251).
- These are the nation's wealthiest consumers. They hire financial advisers to manage their diverse investment portfolios but stay abreast of current financial trends and products.
- Socially responsible consumers who aim for a balanced lifestyle, they are goal oriented and hardworking but make time for their kids or grandkids and maintain a close-knit group of friends.
- These busy consumers seek variety in life. They take an interest in the fine arts; read to expand their knowledge; and consider the internet, radio, and newspapers as key media sources.
- They regularly cook their meals at home, attentive to good nutrition and fresh organic foods.

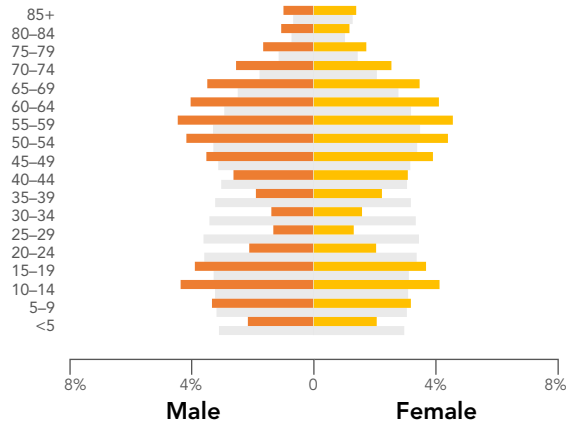
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.



AGE BY SEX (Esri data)

Median Age: 47.3 US: 38.2

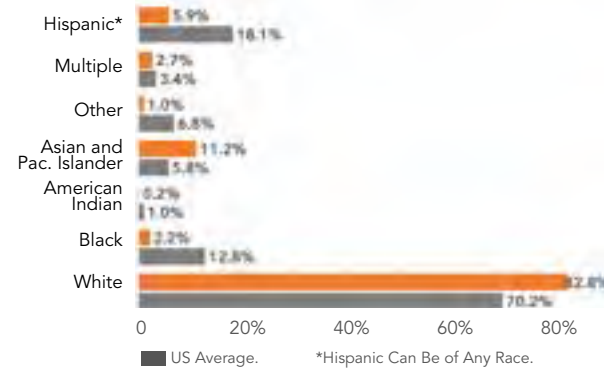
■ Indicates US



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: 37.9 US: 64.0



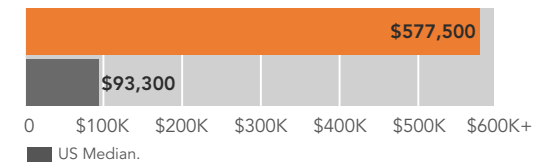
INCOME AND NET WORTH

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

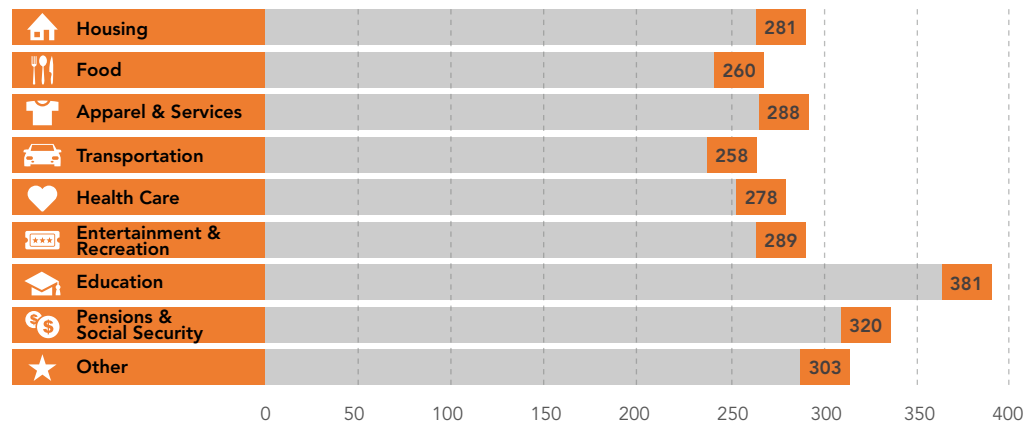


Median Net Worth



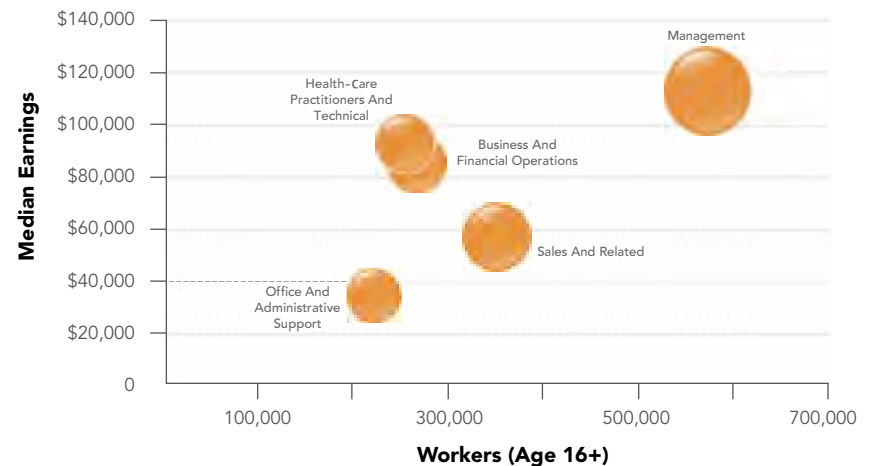
AVERAGE HOUSEHOLD BUDGET INDEX

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 MRI-Simmons.)

- Purchase or lease luxury cars with the latest trim, preferably imports.
- Contribute to arts/cultural organizations, educational and social groups, as well as NPR and PBS.
- Use every service from property and garden maintenance and professional housekeeping to contracting for home improvement or maintenance projects.
- Consumers spend money on themselves; they frequently visit day spas and salons, use dry cleaning services, and exercise at exclusive clubs.
- Near or far, downtown or at the beach, they regularly visit their lavish vacation homes.
- When at home, their schedules are packed with lunch dates, book club meetings, charity dinners, classical music concerts, opera shows, and visits to local art galleries.
- Mostly shop at high-end retailers such as Nordstrom (readily paying full price), as well as Target, Kohl's, Macy's, and Bed Bath & Beyond, and online at Amazon.com.
- At their level of spending, it makes sense to own an airline credit card. They make several domestic and foreign trips a year for leisure and pay for every luxury along the way—a room with a view, limousines, and rental cars are part of the package.

HOUSING

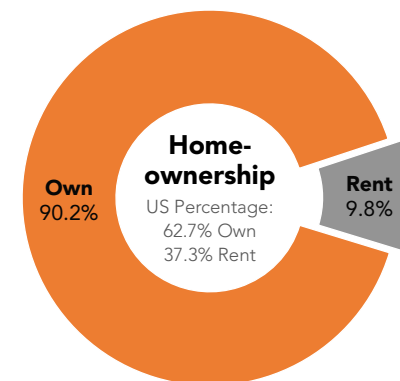
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

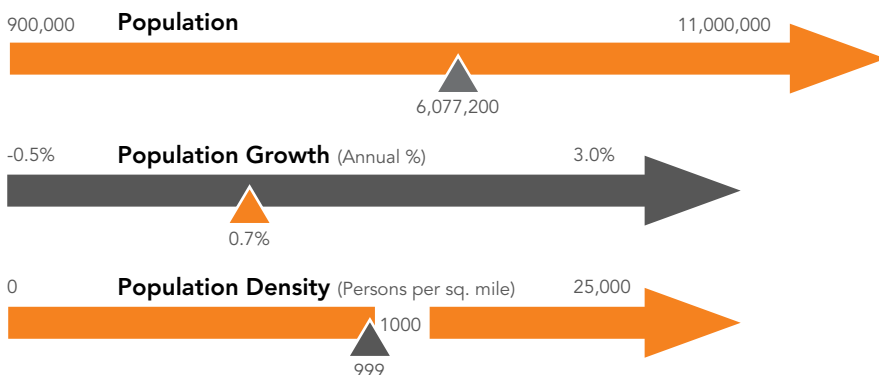
Median Value:
\$819,500

US Median: \$207,300



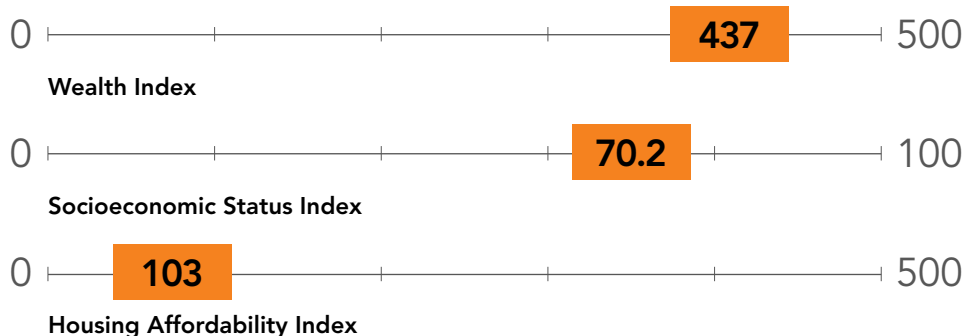
POPULATION CHARACTERISTICS

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

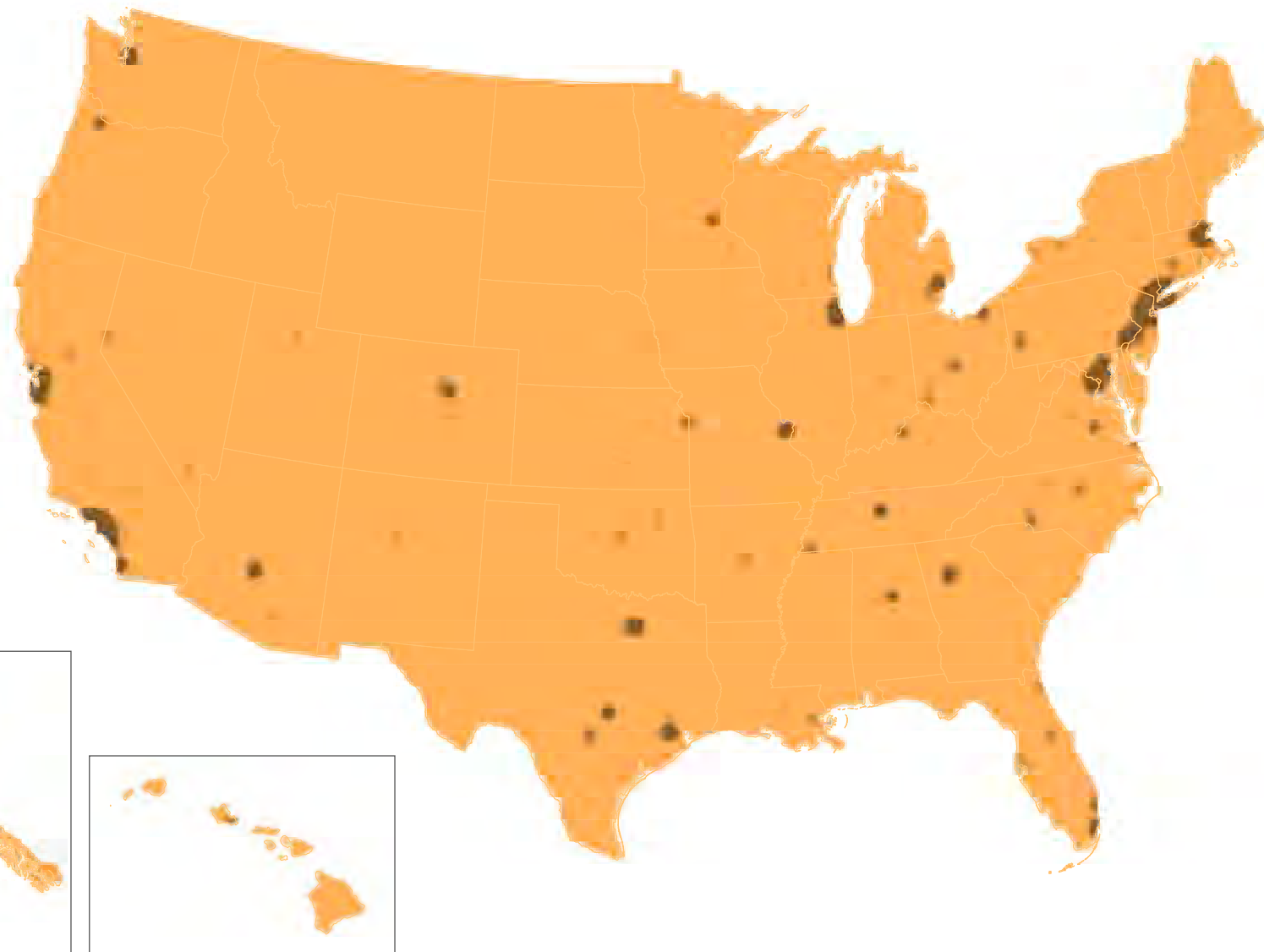
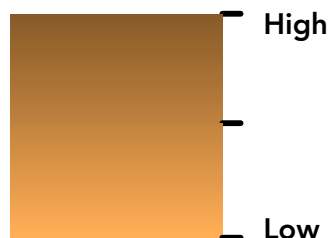
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *Top Tier* Tapestry Segment by households.





LifeMode Group: Hometown

Traditional Living

12B

Households: 2,395,200

Average Household Size: 2.51

Median Age: 35.5

Median Household Income: \$39,300

WHO ARE WE?

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

OUR NEIGHBORHOOD

- Married couples are the dominant household type, but fewer than expected from the younger age profile and fewer with children (Index 79); however, there are higher proportions of single-parent (Index 146) and single-person households (Index 112).
- Average household size is slightly lower at 2.51.
- Homes are primarily single family or duplexes in older neighborhoods, built before 1940 (Index 228).
- Most neighborhoods are located in lower-density urban clusters of metro areas throughout the Midwest and South.
- Average commuting time to work is very short (Index 22).
- Households have one or two vehicles.

SOCIOECONOMIC TRAITS

- Over 70% have completed high school or some college.
- Labor force participation is a bit higher than the national rate at 63.4%.
- Almost three-quarters of households derive income from wages and salaries, augmented by Supplemental Security Income (Index 139) and public assistance (Index 152).
- Cost-conscious consumers that are comfortable with brand loyalty, unless the price is too high.
- Connected and comfortable with the internet, more likely to participate in online gaming or posting pics on social media.
- TV is seen as the most trusted media.



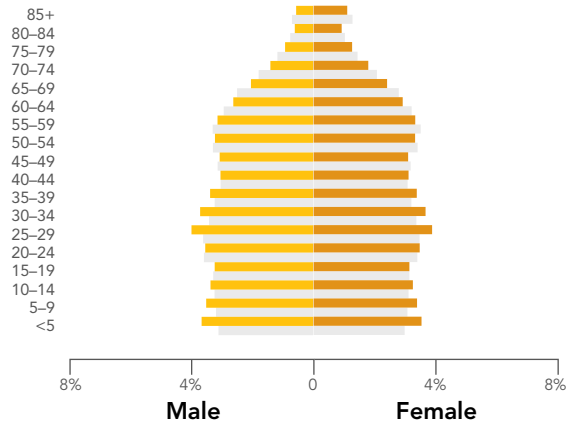
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.



AGE BY SEX (Esri data)

Median Age: 35.5 US: 38.2

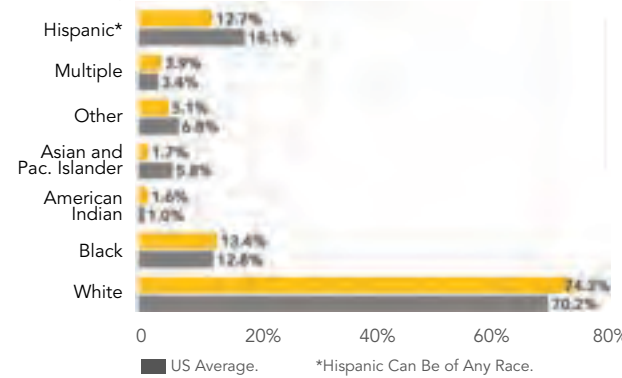
■ Indicates US



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: 55.6 US: 64.0



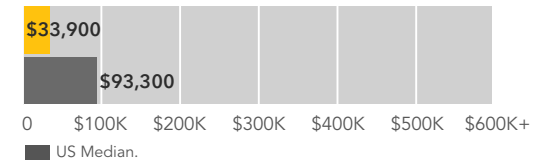
INCOME AND NET WORTH

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

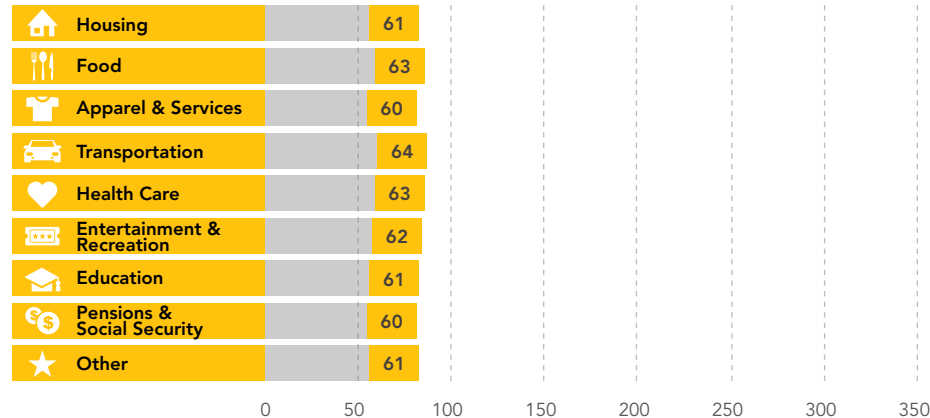


Median Net Worth



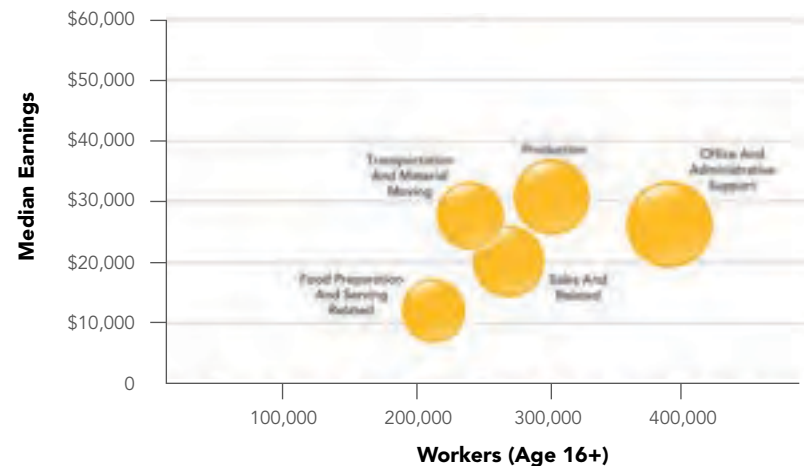
AVERAGE HOUSEHOLD BUDGET INDEX

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 MRI-Simmons.)

- Shop for groceries at discount stores such as Walmart Supercenters.
- Convenience stores are commonly used for fuel or picking up incidentals.
- Tend to carry credit card balances, have personal loans, and pay bills in person.
- Half of households have abandoned landlines for cell phones only.
- Favorite TV channels include Freedom, CMT, and Game Show Network.
- Fast-food devotees.
- Enjoy outdoor activities such as fishing and taking trips to the zoo.

HOUSING

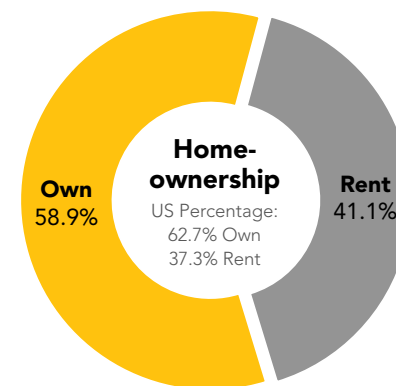
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

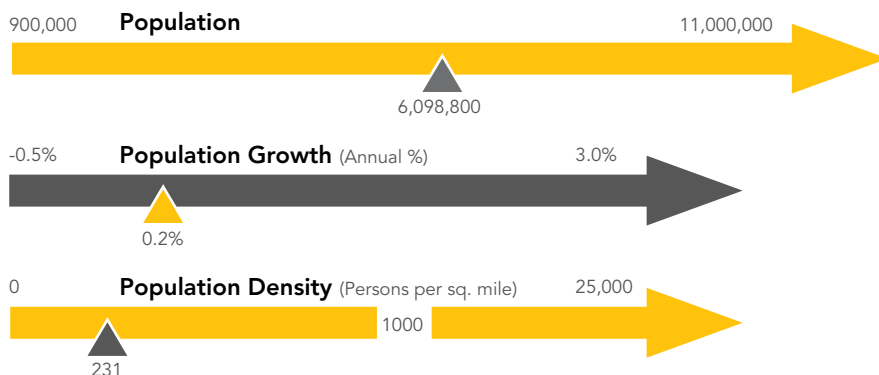
Median Value:
\$83,200

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: Hometown

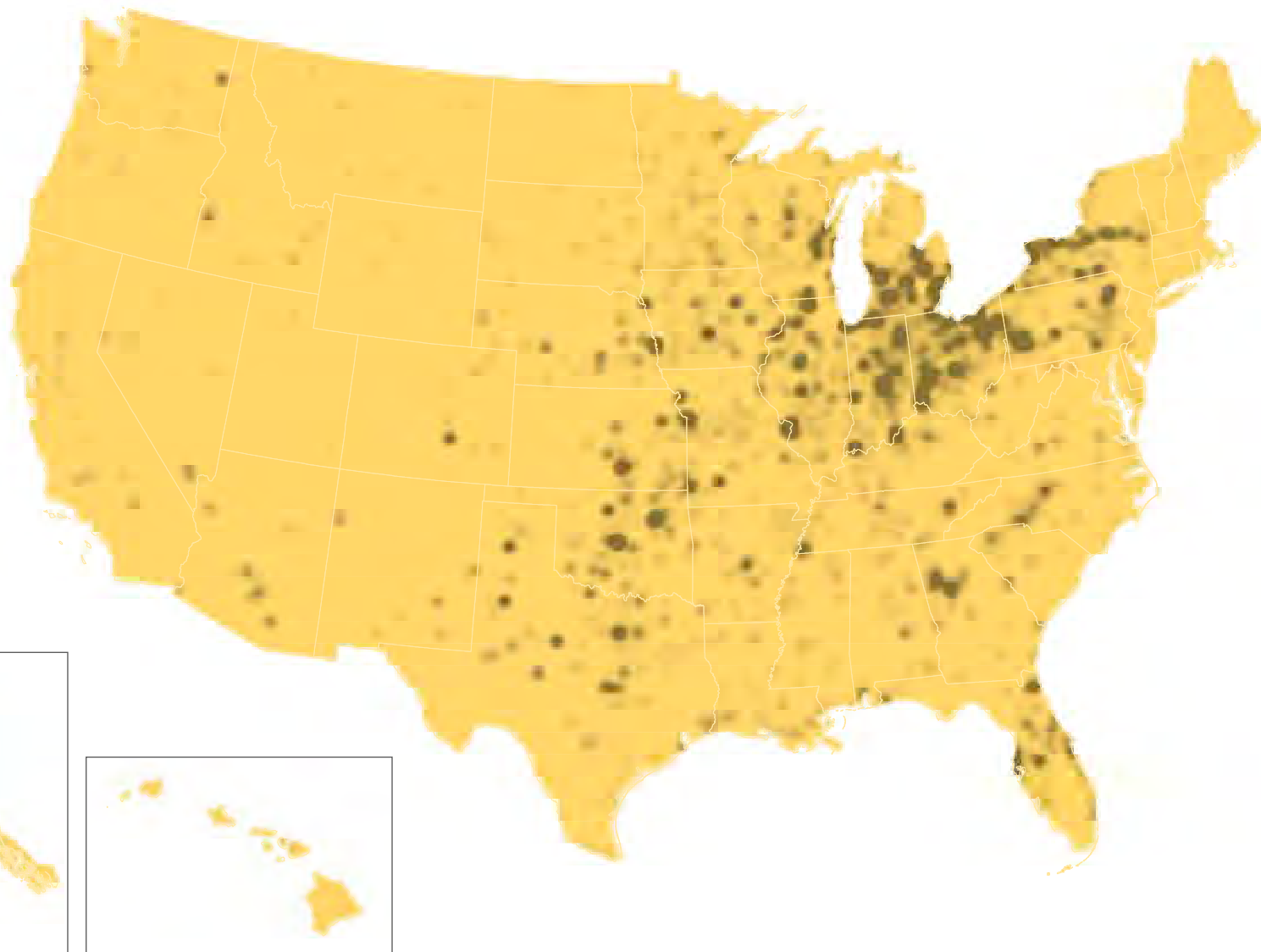
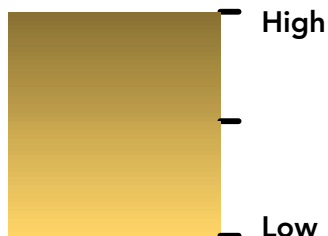
Traditional Living



TAPESTRY
SEGMENTATION
esri.com/tapestry

SEGMENT DENSITY

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



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info@esri.com
esri.com



esri

THE
SCIENCE
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LifeMode Group: Upscale Avenues

Urban Chic

2A

Households: 1,635,200

Average Household Size: 2.39

Median Age: 43.3

Median Household Income: \$109,400

WHO ARE WE?

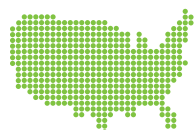
Urban Chic residents are professionals that live a sophisticated, exclusive lifestyle. Half of all households are occupied by married-couple families and about 30% are singles. These are busy, well-connected, and well-educated consumers—avid readers and moviegoers, environmentally active, and financially stable. This market is a bit older, with a median age of 43 years, and growing slowly, but steadily.

OUR NEIGHBORHOOD

- More than half of *Urban Chic* households include married couples; nearly 30% are singles.
- Average household size is slightly lower at 2.39.
- Homes range from prewar to recent construction, high-rise to single family. Over 60% of householders live in single-family homes; more than one in four live in multiunit structures.
- Two-thirds of homes are owner occupied.
- Major concentrations of these neighborhoods are found in the suburban periphery of large metropolitan areas on the California coast and along the East Coast.
- Most households have two vehicles available. Commuting time is slightly longer, but commuting by bicycle is common (Index 252).

SOCIOECONOMIC TRAITS

- Well educated, more than 65% of residents hold a bachelor's degree or higher (Index 212).
- Labor force participation is higher at 68%.
- Residents are employed in white-collar occupations—in managerial, technical, and legal positions.
- Nearly 40% of households receive income from investments.
- Environmentally aware, residents actively recycle and maintain a “green” lifestyle.
- These busy, tech-savvy residents use PCs extensively for an array of activities such as shopping, banking, and staying current—a top market for Apple computers.



TAPESTRY
SEGMENTATION
esri.com/tapestry

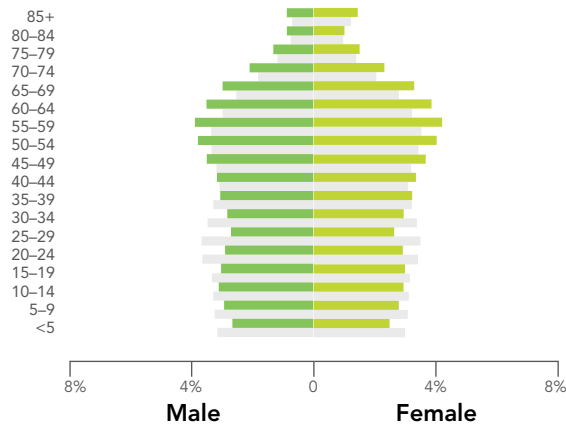
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by MRI-Simmons.



AGE BY SEX (Esri data)

Median Age: 43.3 US: 38.2

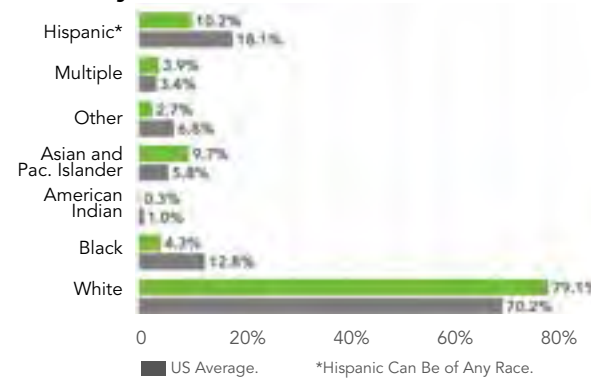
■ Indicates US



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: 48.1 US: 64.0



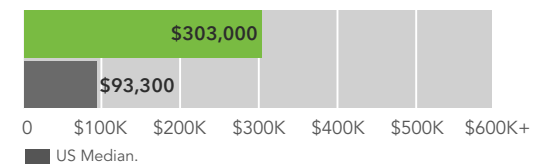
INCOME AND NET WORTH

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

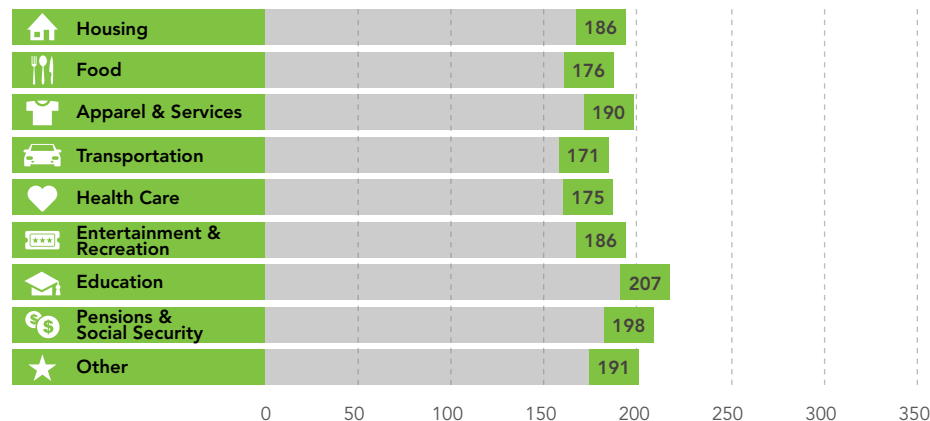


Median Net Worth



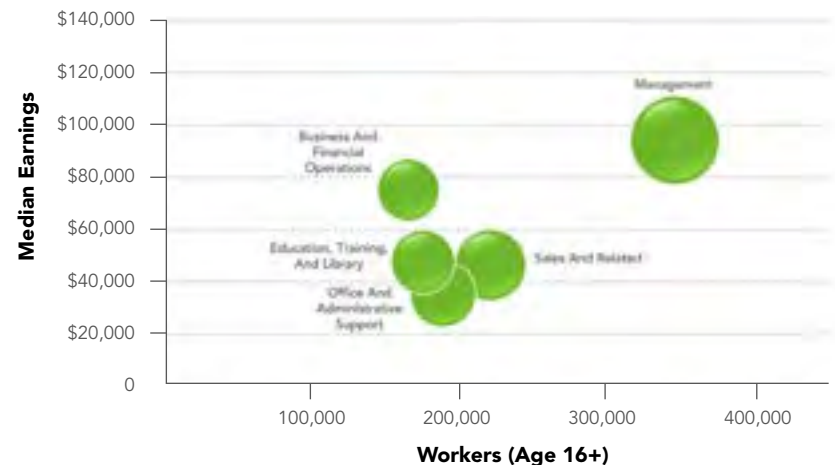
AVERAGE HOUSEHOLD BUDGET INDEX

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 MRI-Simmons.)

- Shop at Trader Joe's, Costco, or Whole Foods.
- Eat organic foods, drink imported wine, and truly appreciate a good cup of coffee.
- Travel extensively (domestically and internationally).
- Prefer to drive luxury imports and shop at upscale establishments.
- Embrace city life by visiting museums, art galleries, and movie theaters for a night out.
- Avid book readers of both digital and audio formats.
- Financially shrewd residents that maintain a healthy portfolio of stocks, bonds, and real estate.
- In their downtime, enjoy activities such as skiing, yoga, hiking, and tennis.

HOUSING

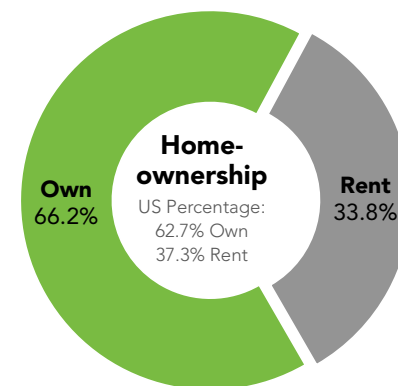
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

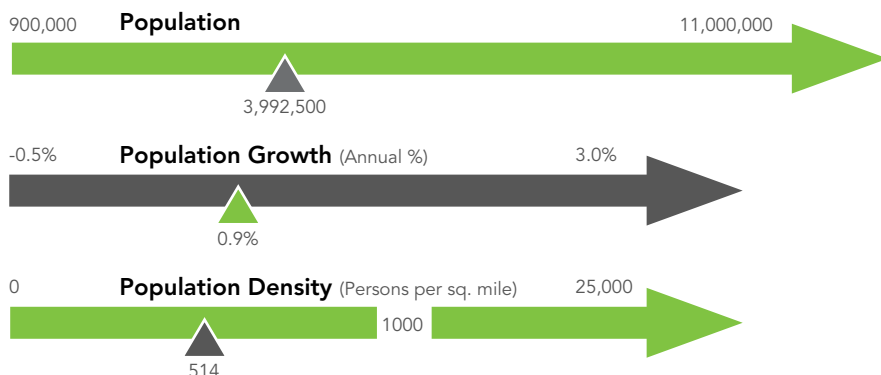
Median Value:
\$623,400

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

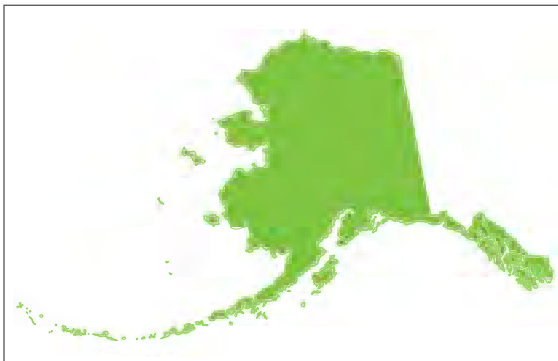
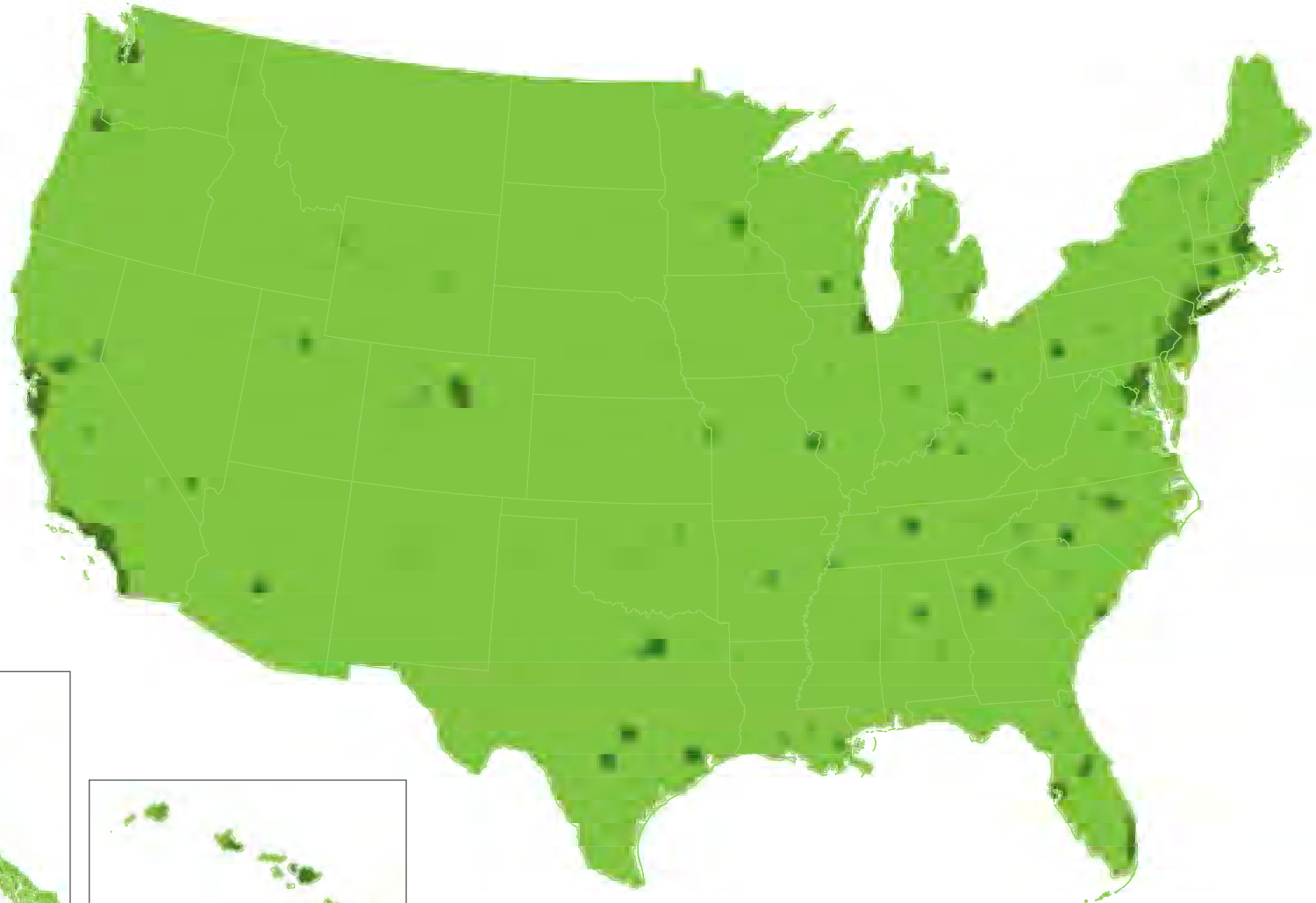
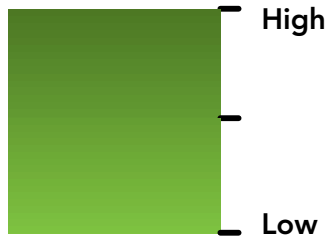
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *Urban Chic* Tapestry Segment by households.





LifeMode Group: Midtown Singles

City Commons

11E

Households: 1,106,600

Average Household Size: 2.67

Median Age: 28.5

Median Household Income: \$18,300

WHO ARE WE?

This segment is one of Tapestry Segmentation's youngest markets. It is primarily composed of single-parent and single-person households living within large metro cities located primarily in the eastern half of the US. While more than a third have a college degree or spent some time in college, nearly a quarter have not finished high school. These residents strive for the best for themselves and their children. Most occupations are within office and administrative Support.

OUR NEIGHBORHOOD

- Single parents (Index 315), primarily female, and singles head these young households.
- Average household size is slightly higher than the US at 2.67.
- *City Commons* residents are found in large metropolitan cities, where most residents rent apartments in mid-rise buildings.
- Neighborhoods are older, built before 1960 (Index 151).
- Typical of the city, many households own either one vehicle or none and use public transportation (Index 292) or taxis (Index 299).

SOCIOECONOMIC TRAITS

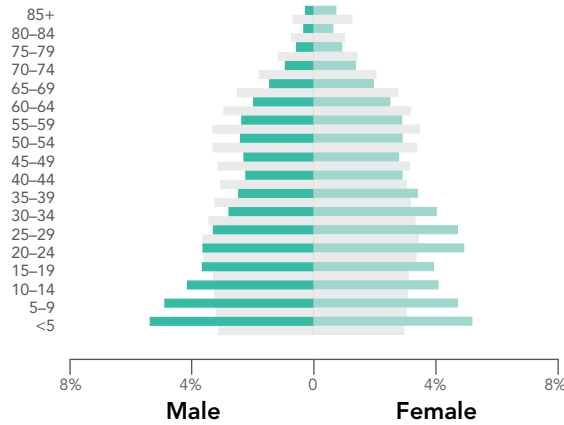
- Although some have college degrees, nearly a quarter have not graduated from high school.
- Labor force participation is low at 53% (Index 84).
- Most households receive income from wages or salaries, with nearly one in four that receive contributions from Social Security (Index 287) and public assistance (Index 355).
- Consumers endeavor to keep up with the latest fashion trends.
- Many families prefer the convenience of fast-food restaurants to cooking at home.



AGE BY SEX (Esri data)

Median Age: **28.5** US: 38.2

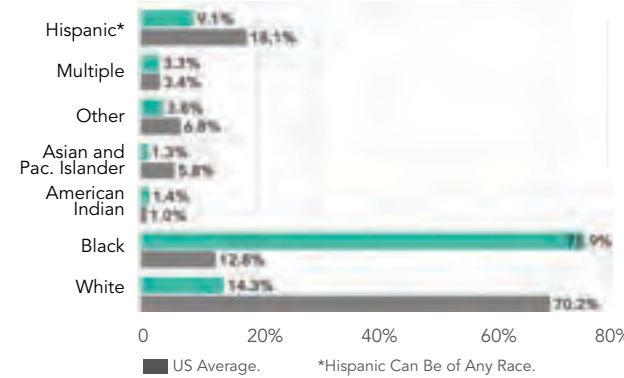
■ Indicates US



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: **50.2** US: 64.0



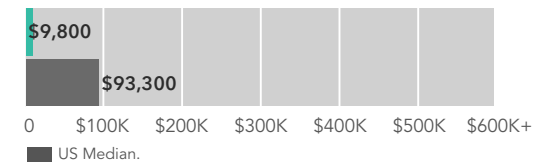
INCOME AND NET WORTH

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

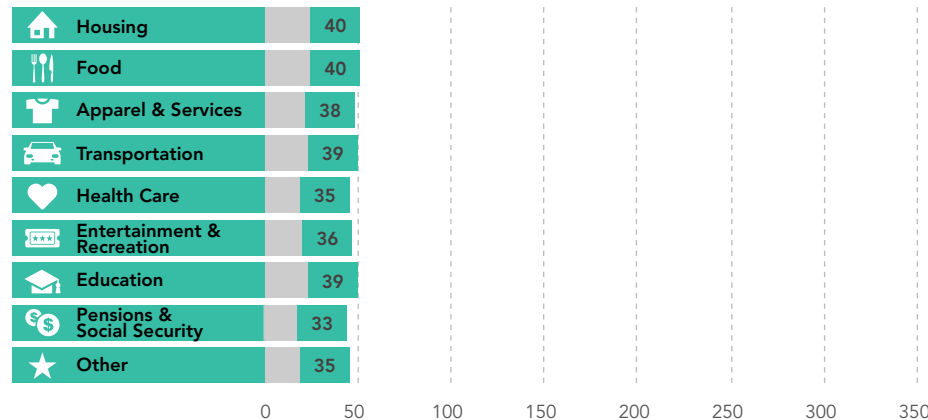


Median Net Worth



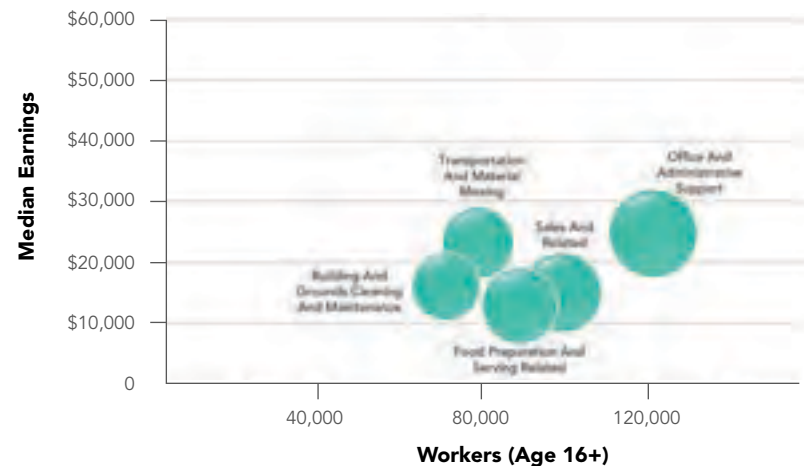
AVERAGE HOUSEHOLD BUDGET INDEX

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OCCUPATION BY EARNINGS

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





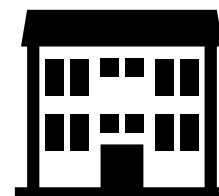
MARKET PROFILE

(Consumer preferences are estimated from data by MRI-Simmons.)

- Baby and children's products, like food and clothing, are the primary purchases.
- Shop primarily at warehouse clubs like Sam's Club, Walmart Supercenter, and discount department stores such as Old Navy and Burlington.
- While most residents obtain privately issued medical insurance plans, some are covered by federal programs like Medicaid.
- Subscribe to cable TV; children-oriented programs are popular, as are game shows and movie channels.
- Magazines are extremely popular sources of news and the latest trends, including baby, bridal, and parenthood types of magazines.
- Enjoy listening to urban radio.

HOUSING

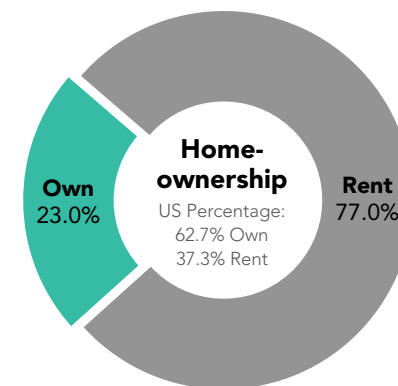
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Multiunit Rentals;
Single Family

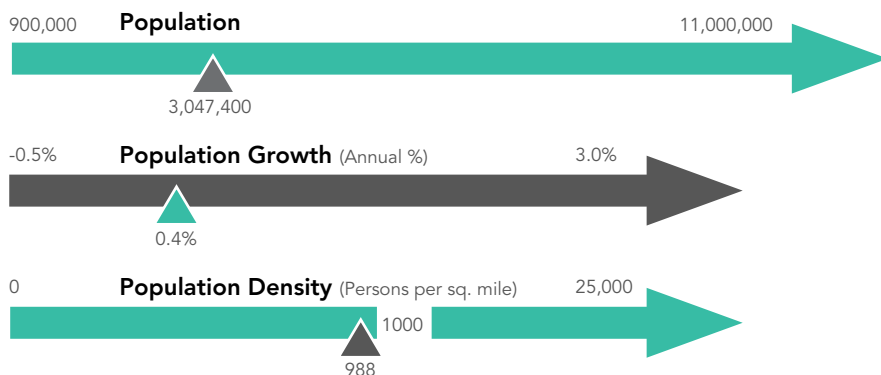
Average Rent:
\$658

US Average: \$1,038



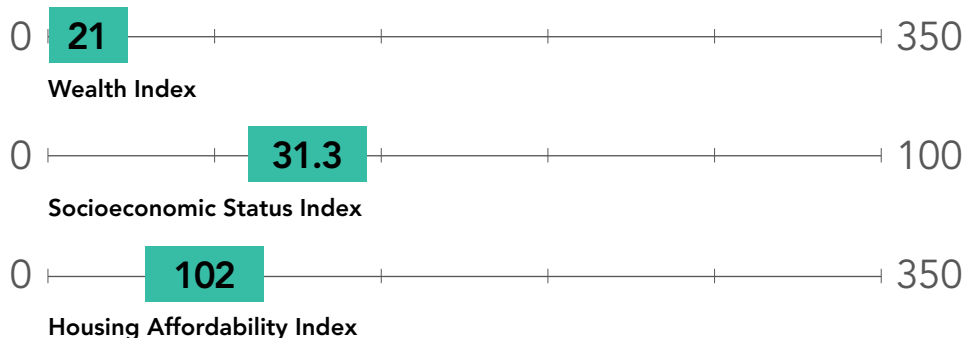
POPULATION CHARACTERISTICS

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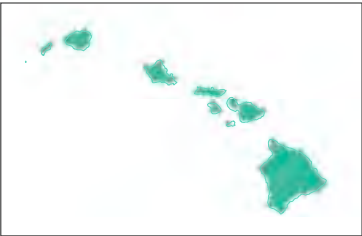
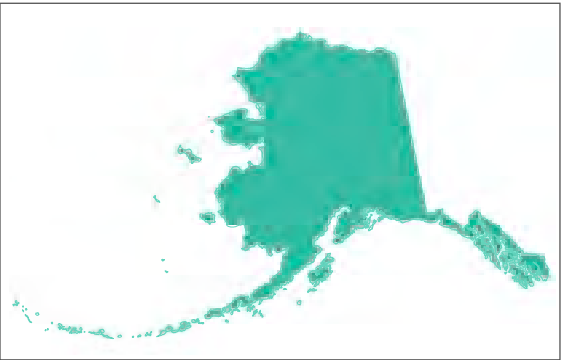
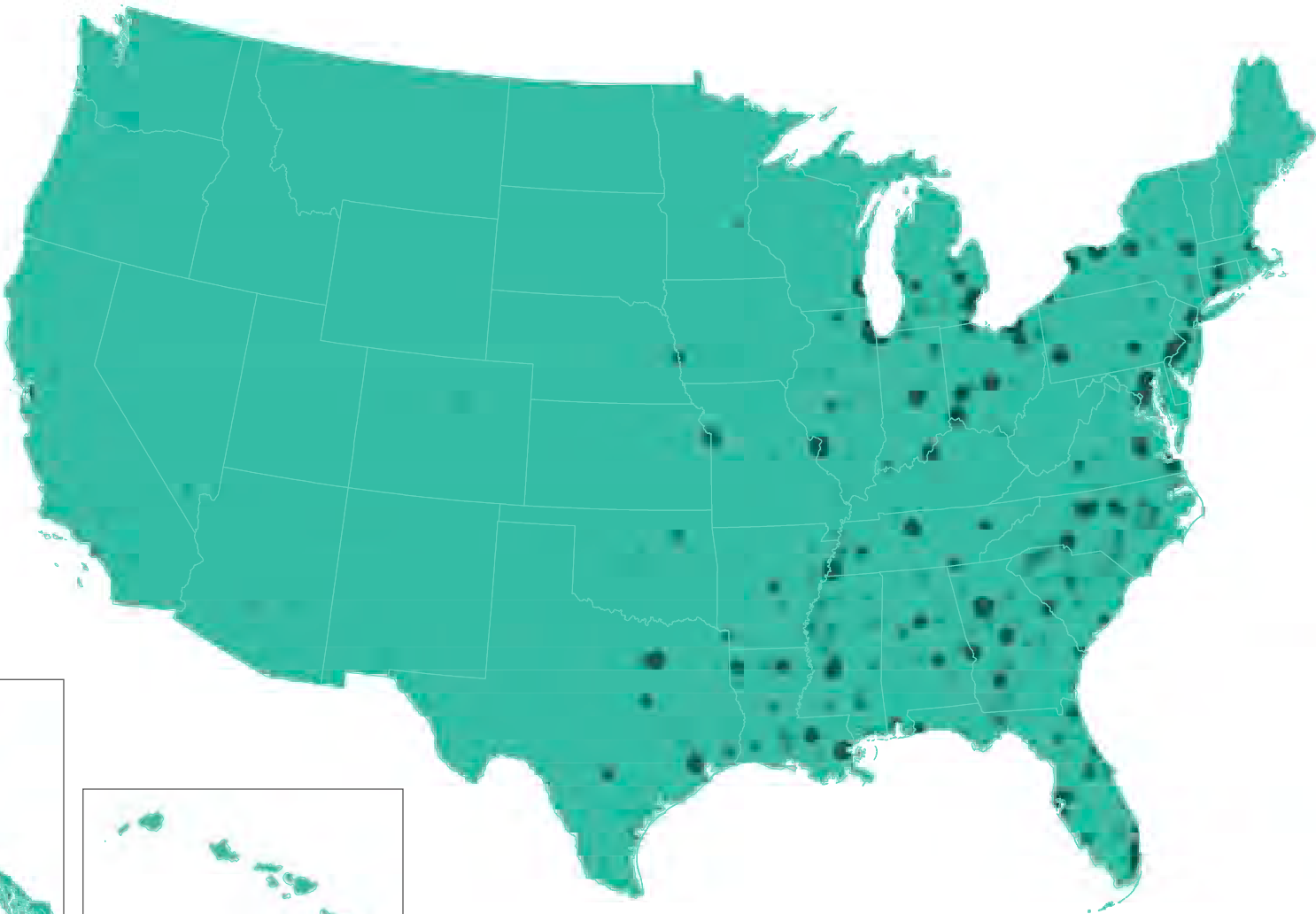
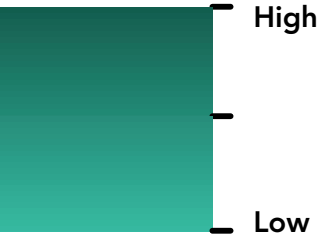
ESRI INDEXES

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 *City Commons* 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. 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

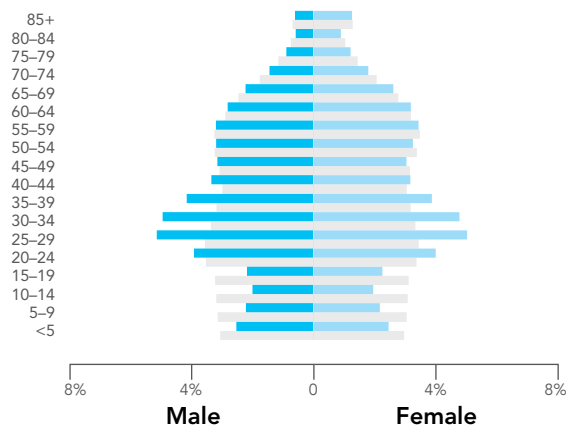
- Consumers research products carefully before making purchases.
- They buy natural, green, and environmentally friendly products.
- Very conscious of nutrition, they regularly buy and eat organic foods.
- Cell phones and text messaging are a huge part of everyday life.
- They place importance on learning 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

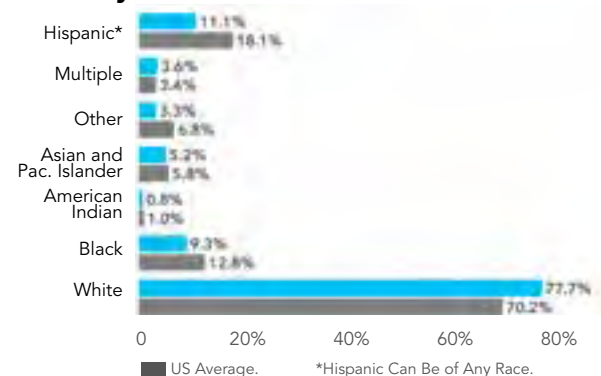
■ Indicates US



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



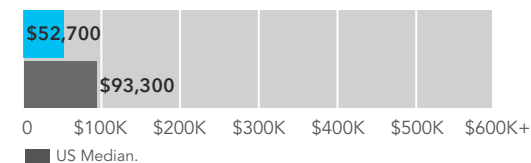
INCOME AND NET WORTH

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

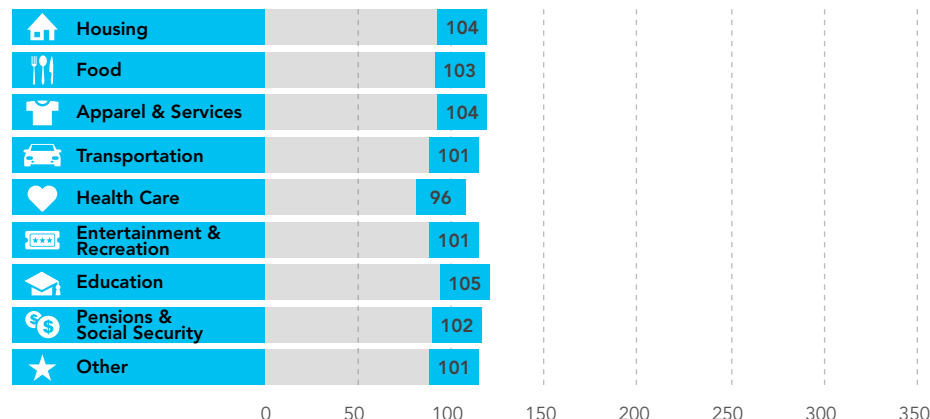


Median Net Worth



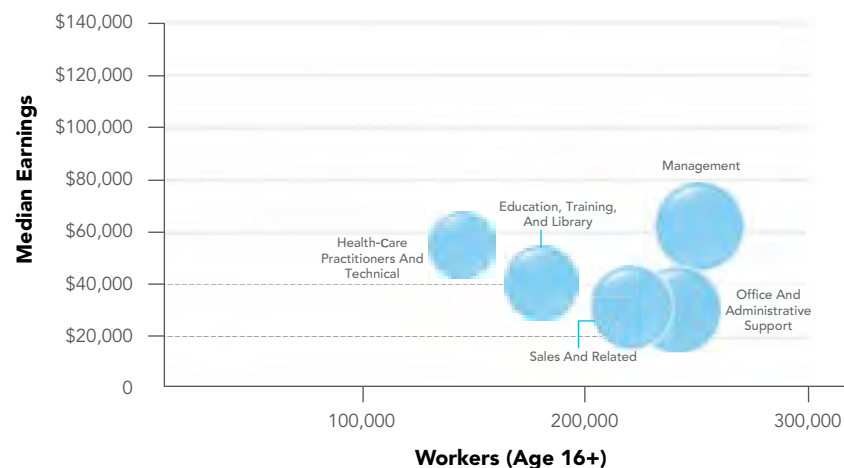
AVERAGE HOUSEHOLD BUDGET INDEX

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 MRI-Simmons.)

- 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

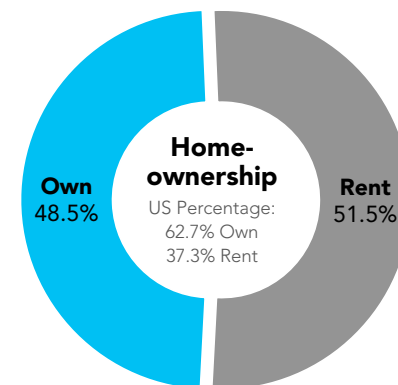
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family;
Multi-Units

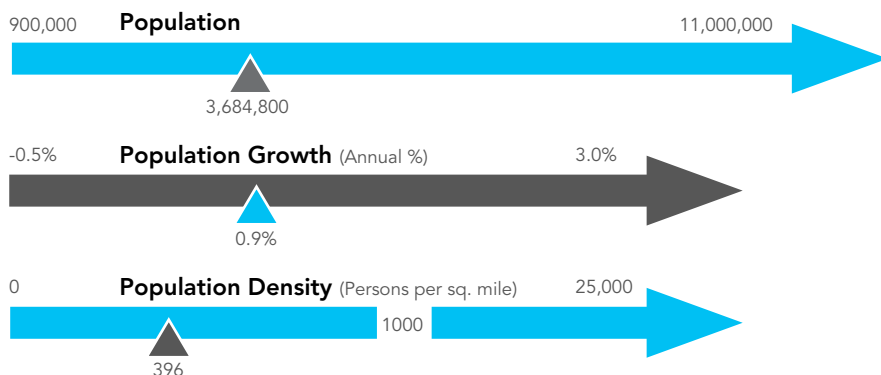
Average Rent:
\$1,087

US Average: \$1,038



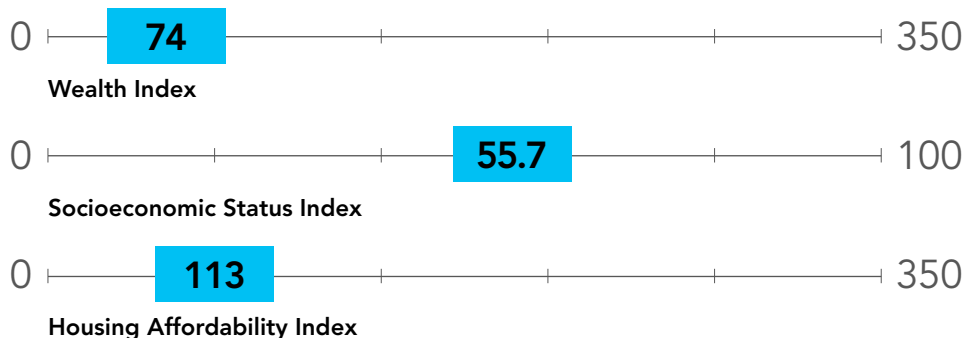
POPULATION CHARACTERISTICS

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

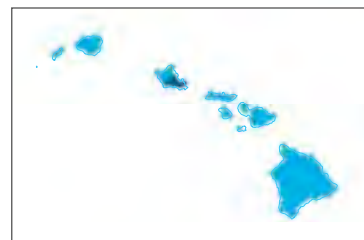
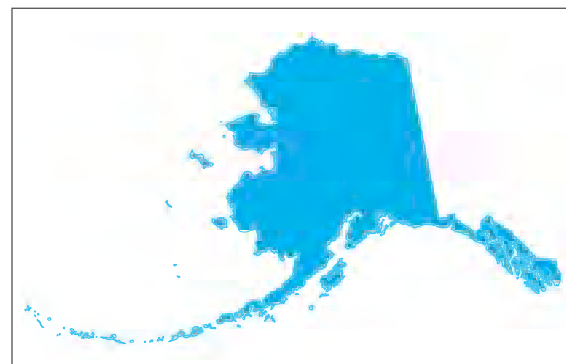
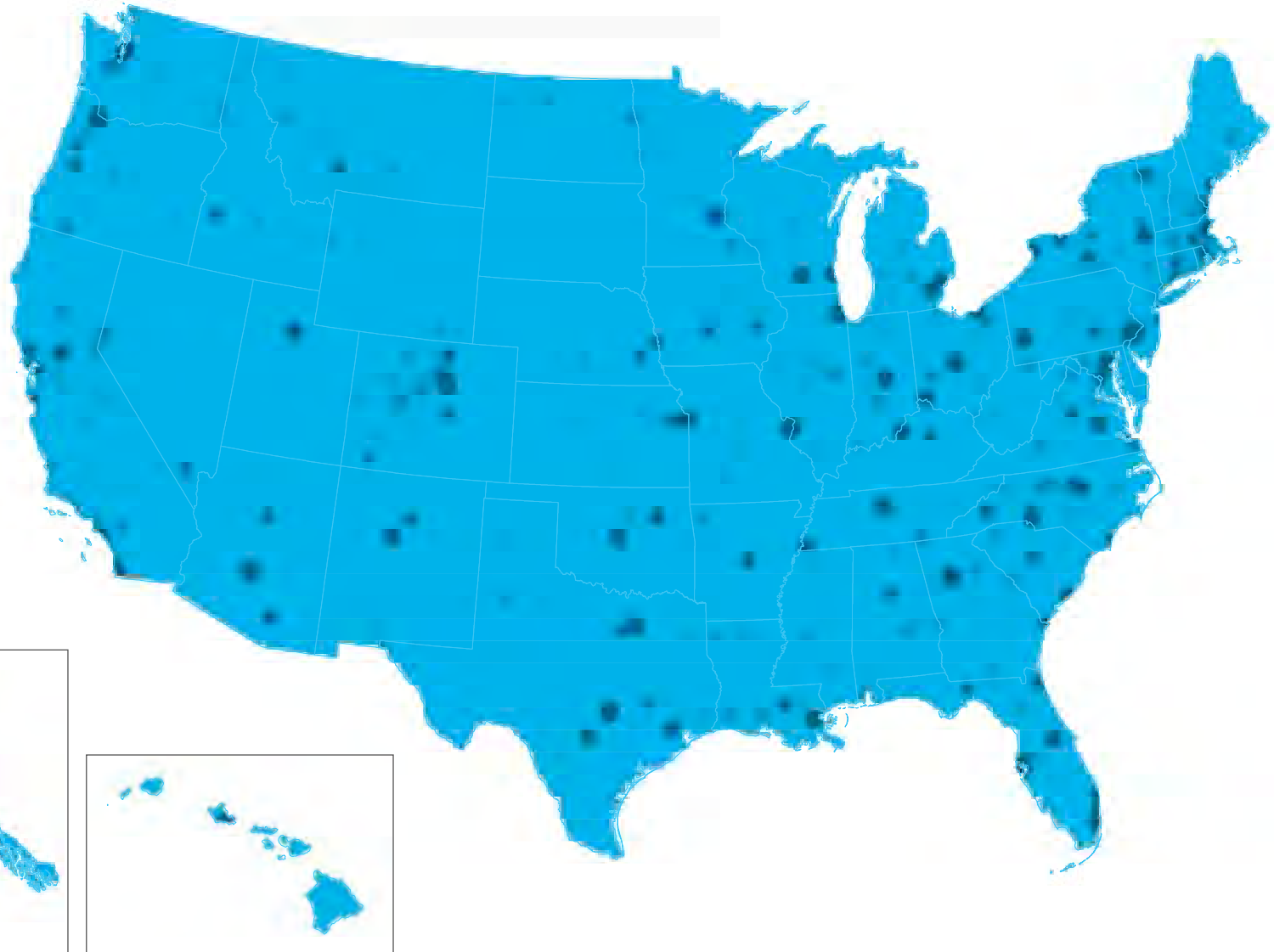
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

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





LifeMode Group: Hometown

Family Foundations

12A

Households: 1,299,600

Average Household Size: 2.71

Median Age: 39.6

Median Household Income: \$43,100

WHO ARE WE?

Family and faith are the cornerstones of life in these communities. Older children, still living at home, working toward financial independence, are common within these households. Neighborhoods are stable: little household growth has occurred for more than a decade. Many residents work in the health-care industry or public administration across all levels of government. Style is important to these consumers, who spend on clothing for themselves and their children as well as on smartphones.

OUR NEIGHBORHOOD

- *Family Foundations* residents are a mix of married couples, single parents, grandparents, and children, young and adult.
- Average household size is slightly higher at 2.71.
- Neighborhoods are found in principal cities of major metropolitan areas throughout the South and West.
- More than two-thirds are homeowners living in single-family houses built before 1970.
- Nearly three-fourths of all households have one or two vehicles at their disposal; average commute time is slightly higher.

SOCIOECONOMIC TRAITS

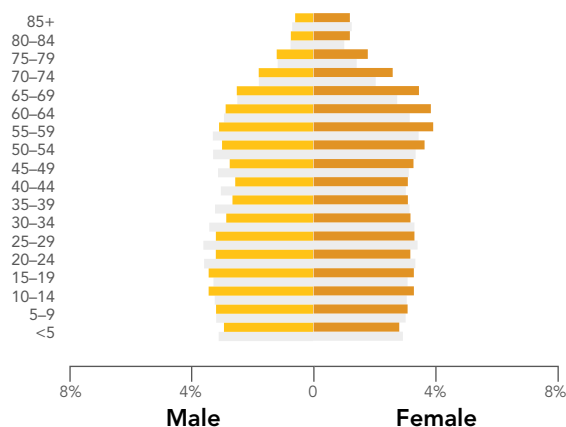
- More than half have either attended college or obtained a degree; one-third have only finished high school.
- Labor force participation rate is slightly lower at 58% as workers begin to retire.
- Over one-third of households currently receive Social Security benefits; just under a quarter draw income from retirement accounts.
- A strong focus is on religion and character.
- Style and appearance are important.



AGE BY SEX (Esri data)

Median Age: **39.6** US: 38.2

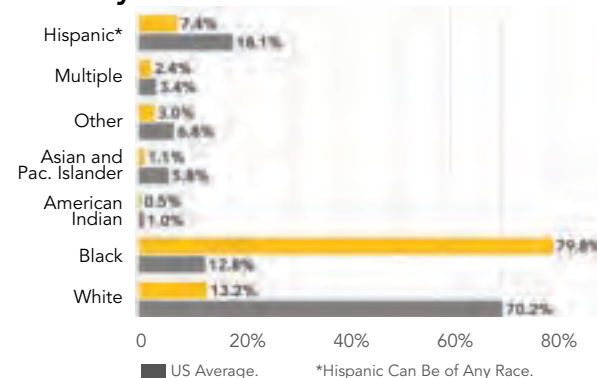
■ Indicates US



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: **43.5** US: 64.0



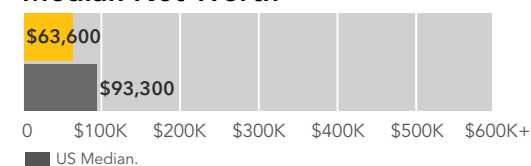
INCOME AND NET WORTH

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

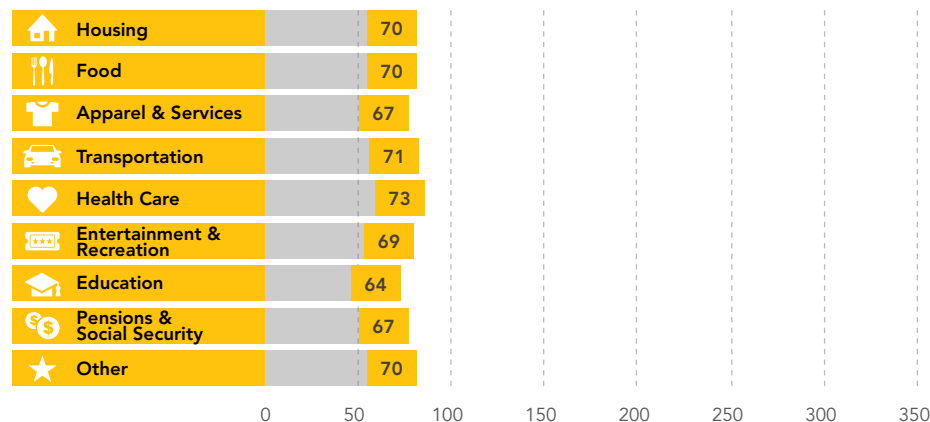


Median Net Worth



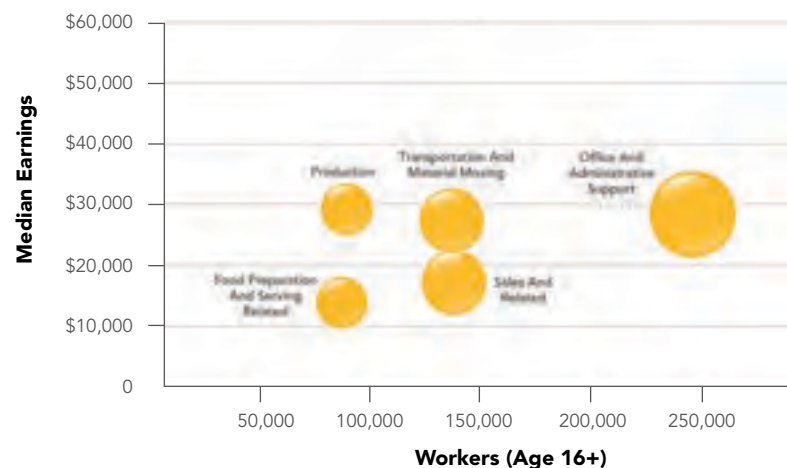
AVERAGE HOUSEHOLD BUDGET INDEX

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 MRI-Simmons.)

- Baby and children's products are the primary purchases made by *Family Foundations* residents.
- Shop at discount stores, such as Marshalls, Kmart, dollar stores, and take advantage of savings at Sam's Club.
- Many have no financial investments or retirement savings.
- Magazines, particularly focusing on health and children, are popular.
- Enjoy listening to urban format radio.
- Favorite entertainment sources include television: subscribe to premium cable channels and own three to four TVs.
- Connected, using the internet primarily for entertainment, chat rooms, and online gaming.

HOUSING

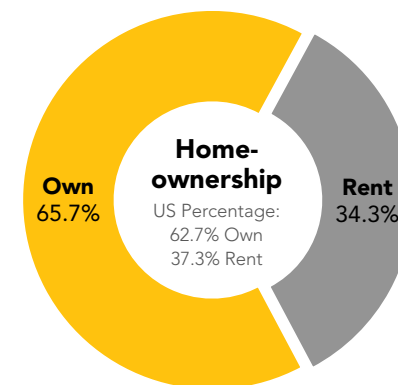
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

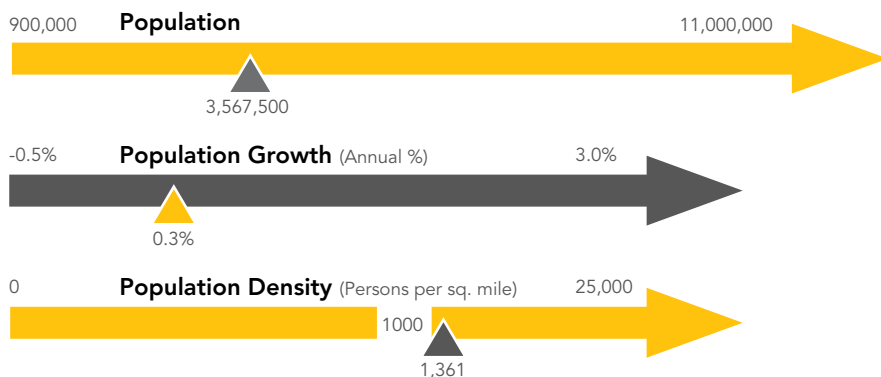
Median Value:
\$116,600

US Median: \$207,300



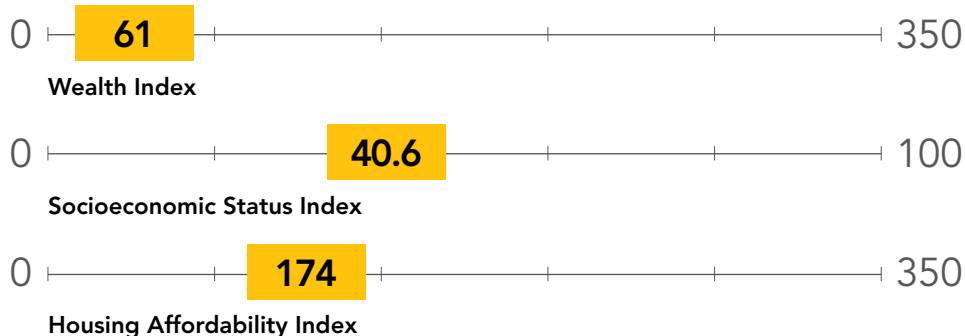
POPULATION CHARACTERISTICS

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

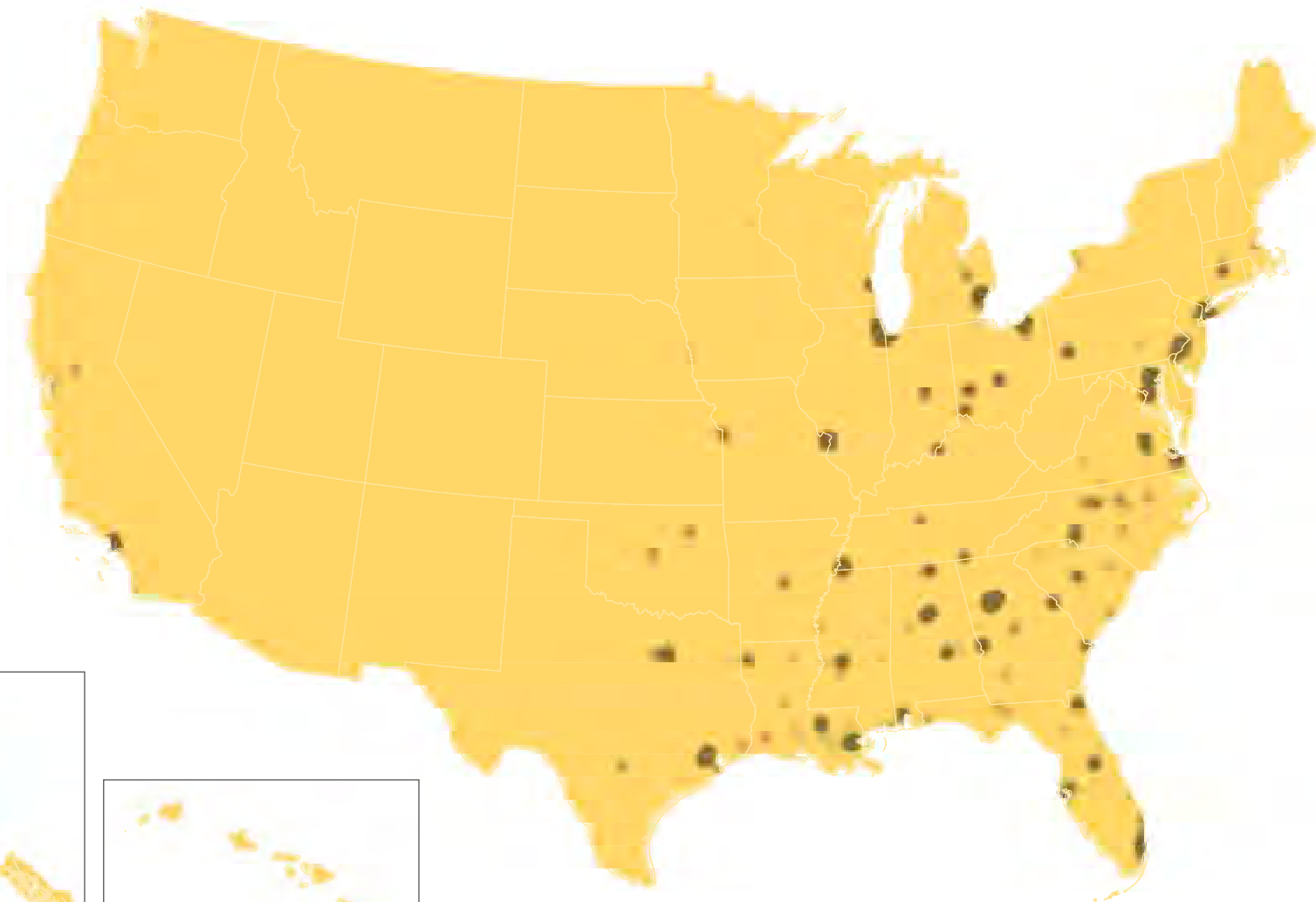
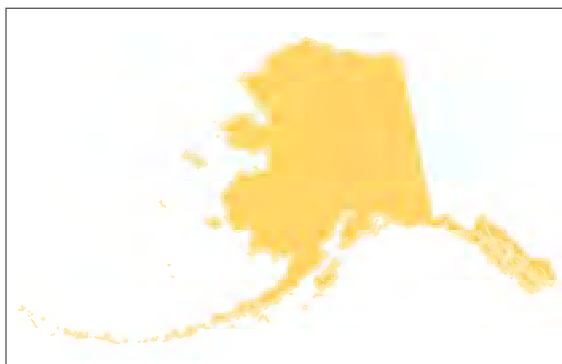
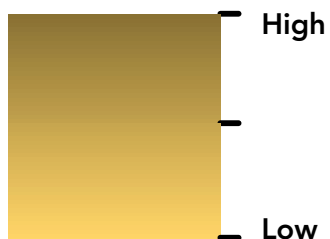
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *Family Foundations* Tapestry Segment by households.





LifeMode Group: Senior Styles

Golden Years

9B

Households: 1,657,400

Average Household Size: 2.06

Median Age: 52.3

Median Household Income: \$71,700

WHO ARE WE?

Independent, active seniors nearing the end of their careers or already in retirement best describes *Golden Years* residents. This market is primarily singles living alone or empty nesters. Those still active in the labor force are employed in professional occupations; however, these consumers are actively pursuing a variety of leisure interests—travel, sports, dining out, museums, and concerts. They are involved, focused on physical fitness, and enjoying their lives. This market is smaller, but growing, and financially secure.

OUR NEIGHBORHOOD

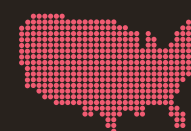
- This older market has a median age of 52 years and a disproportionate share (nearly 32%) of residents aged 65 years or older.
- Single-person households (over 40%) and married-couple families with no children (one-third) dominate these neighborhoods; average household size is low at 2.06 (Index 80).
- Most of the housing was built after 1970; approximately 43% of householders live in single-family homes and 43% in multiunit dwellings.
- These neighborhoods are found in large metropolitan areas, outside central cities, scattered across the US.

SOCIOECONOMIC TRAITS

- *Golden Years* residents—22% have graduate or professional degrees, 28% have bachelor's degrees, and 25% have some college credits.
- Labor force participation is somewhat low at 56% (Index 89), due to residents reaching retirement.
- Median household income is higher in this market, more than \$71,000. Although wages still provide income to nearly two out of three households, earned income is available from investments (Index 171), Social Security benefits (Index 146), and retirement income (Index 144).
- These consumers are well connected: Internet access is used for everything from shopping or paying bills to monitoring investments and entertainment.
- They are generous supporters of the arts and charitable organizations.
- They keep their landlines and view cell phones more as a convenience.



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



AGE BY SEX (Esri data)

Median Age: 52.3 US: 38.2

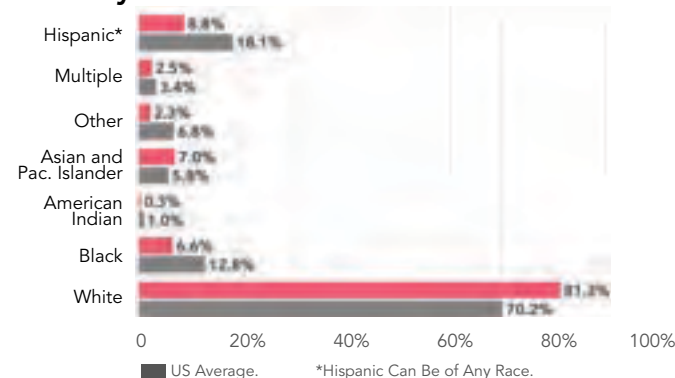
■ Indicates US



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: 43.8 US: 64.0



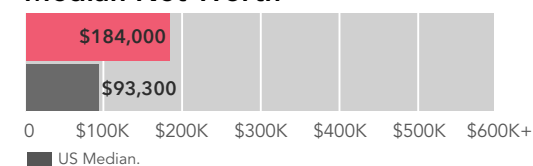
INCOME AND NET WORTH

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

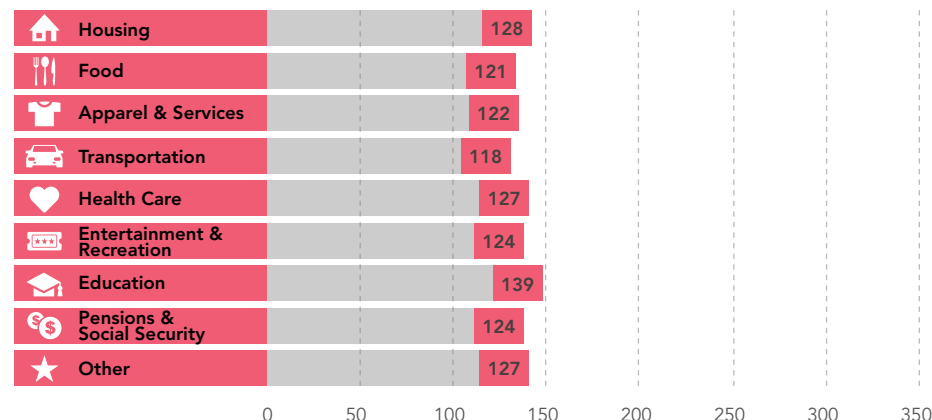


Median Net Worth



AVERAGE HOUSEHOLD BUDGET INDEX

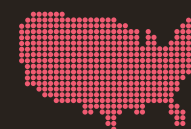
The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average.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

- Avid readers, they regularly read daily newspapers, particularly the Sunday edition.
- They subscribe to cable TV; news and sports programs are popular as well as on-demand movies.
- They use professional services to maintain their homes inside and out and minimize their chores.
- Leisure time is spent on sports (tennis, golf, boating, and fishing) or simple exercise like walking.
- Good health is a priority; they believe in healthy eating, coupled with vitamins and dietary supplements.
- Active social lives include travel, especially abroad, plus going to concerts and museums.
- Residents maintain actively managed financial portfolios that include a range of instruments such as IRAs, common stocks, and certificates of deposit (more than six months).

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.



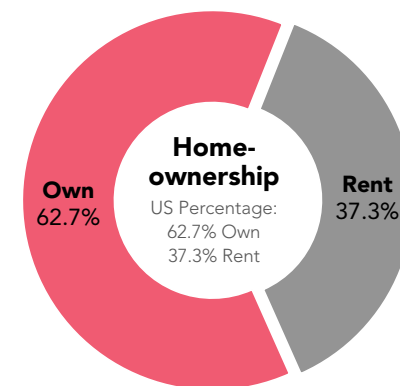
Typical Housing:

Single Family;
Multiunits

Median Value:

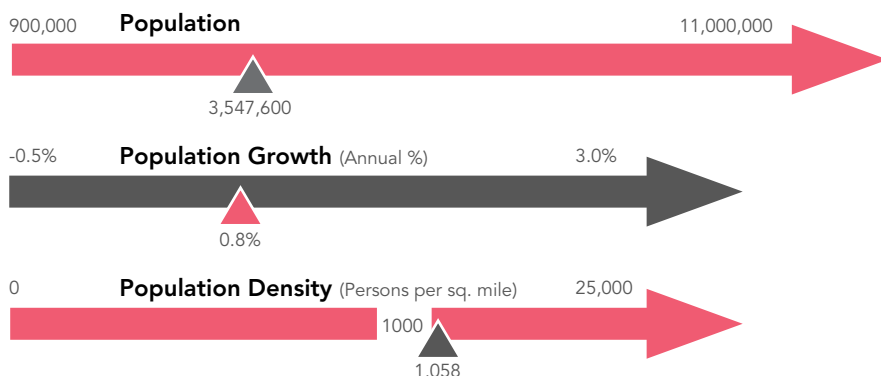
\$332,100

US Median: \$207,300



POPULATION CHARACTERISTICS

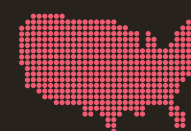
Total population, average annual population change since Census 2010, and average density (population per square mile) are displayed for the market relative to the size and change among all Tapestry markets. Data estimated by Esri.



ESRI INDEXES

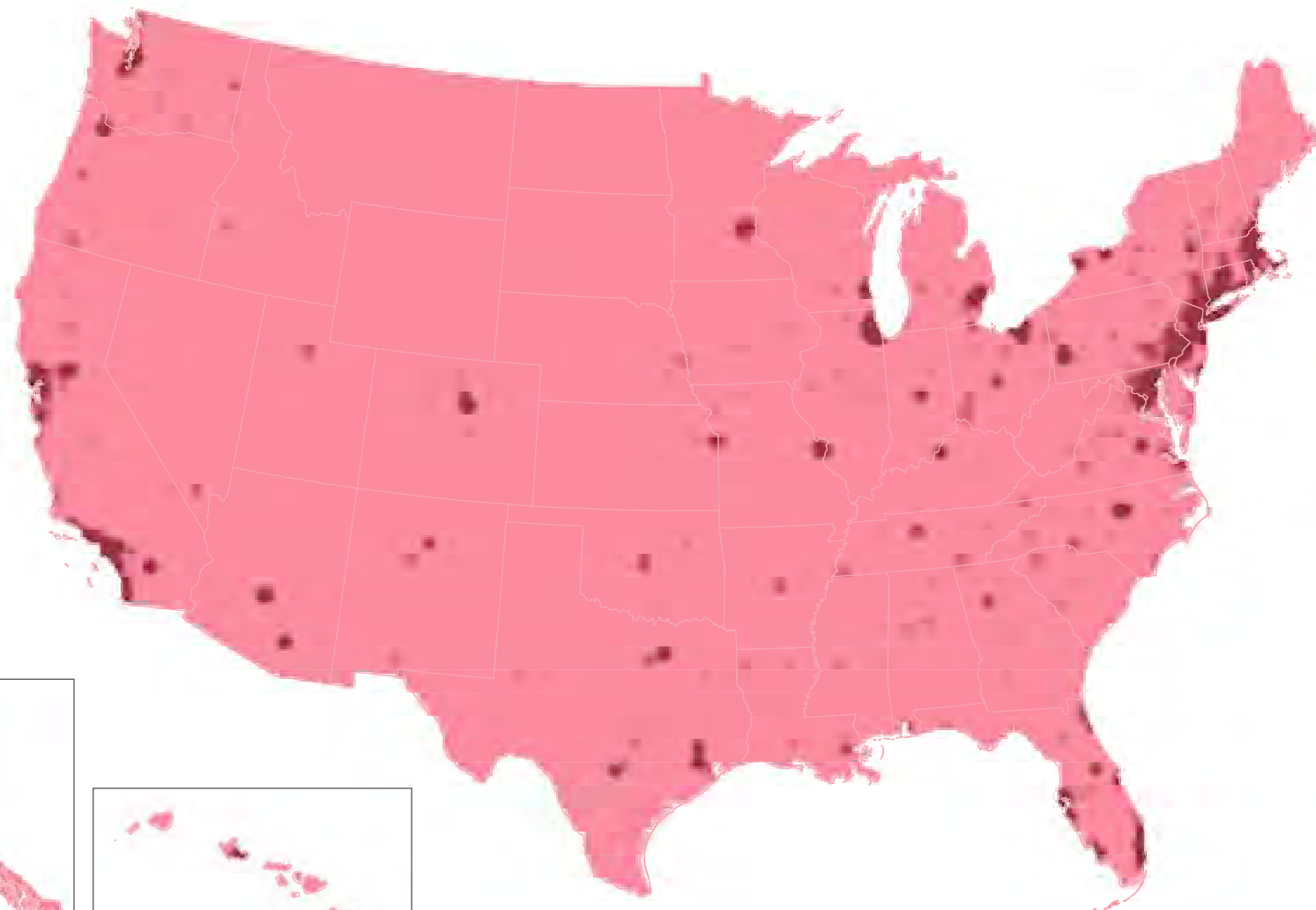
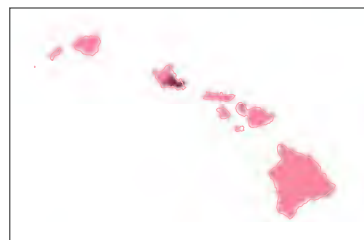
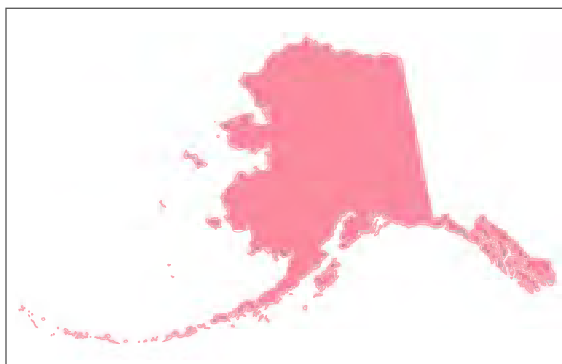
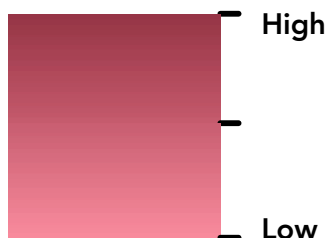
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the *Golden Years* Tapestry Segment by households.





LifeMode Group: Middle Ground

Hometown Heritage

8G

Households: 1,507,700

Average Household Size: 2.66

Median Age: 32.4

Median Household Income: \$28,200

WHO ARE WE?

Hometown Heritage neighborhoods are in urbanized areas within central cities, with older housing, located mainly in the Midwest and South. This slightly smaller market is primarily a family market, married couples (with and without children) and single parents. They work mainly in service, manufacturing, and retail trade industries. 60% of householders are renters, living primarily in single-family homes, with a higher proportion of dwellings in 2–4 unit buildings.

OUR NEIGHBORHOOD

- Renters: About three-fifths of households.
- Primarily family households, married couples with or without children, single parents (Index 203), and multigenerational households (Index 137).
- Primarily single-family homes (61%), with a higher proportion of dwellings in 2–4 unit buildings (Index 225).
- Older housing, built before 1960 (59%), with a higher proportion built in the 1940s (Index 215) or earlier (Index 257).
- Higher percentage of vacant housing units at 18% (Index 155).
- Most households with one or two vehicles (71%), but 19% have no vehicle (Index 204).

SOCIOECONOMIC TRAITS

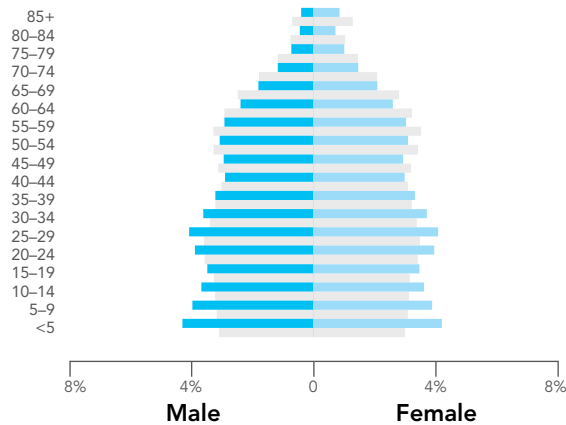
- Education completed: 38% with a high school diploma only (Index 137); 28% with some college or an associate's degree (Index 97).
- Higher rates of employment in manufacturing.
- Labor force participation rate is lower at 57.1%.
- Wages and salaries are the primary source of income for 70% of households, with contributions from Supplemental Security Income for 12% (Index 232) and public assistance for 7% (Index 254).
- These cost-conscious consumers purchase sale items in bulk and buy generic over name brands.
- They tend to save money for a specific purpose.



AGE BY SEX (Esri data)

Median Age: **32.4** US: 38.2

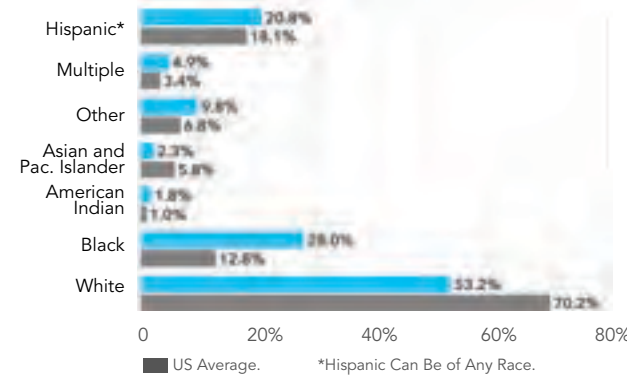
■ Indicates US



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: **75.7** US: 64.0



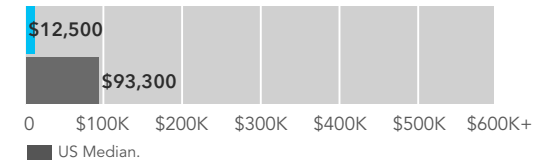
INCOME AND NET WORTH

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

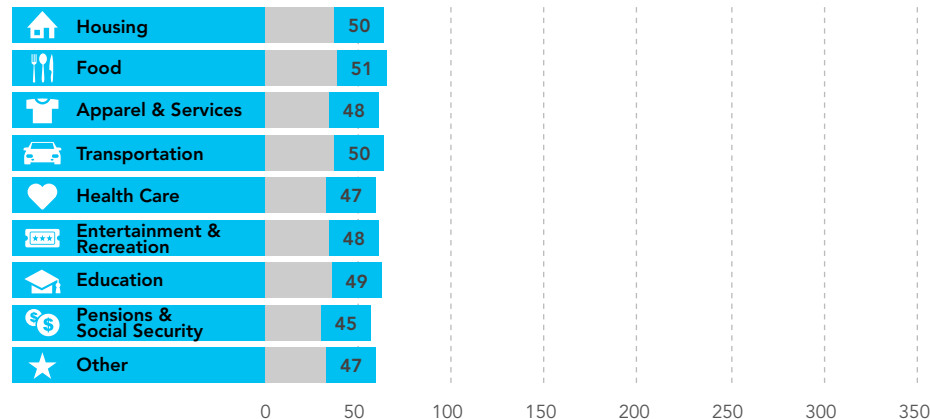


Median Net Worth



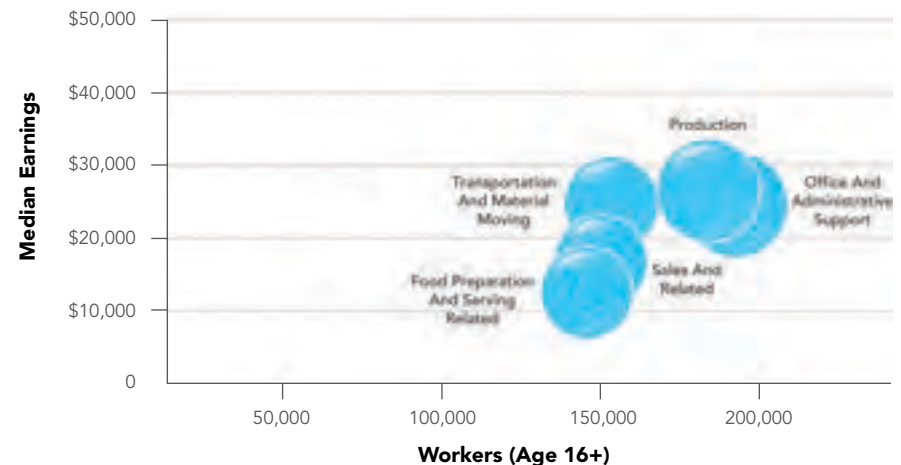
AVERAGE HOUSEHOLD BUDGET INDEX

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.





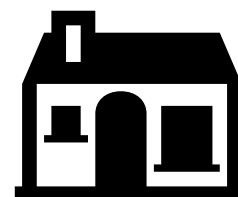
MARKET PROFILE

(Consumer preferences are estimated from data by MRI-Simmons.)

- For those with young children at home, watching Disney Channel, Cartoon Network, and Nickelodeon on TV is popular; diapers, baby food, and children's clothing are priority expenditures.
- Favor shopping at their local discount store, search for bargains on the internet, or purchasing from in-home sales representatives.
- Read parenting and health magazines.
- Watch programs on BET, VH1, and Game Show Network.
- Prefer to listen to gospel, R&B, rap, and hip-hop music.
- Like to listen to sports on the radio and watch on TV. Favorite sports include NASCAR racing, professional wrestling, and basketball.

HOUSING

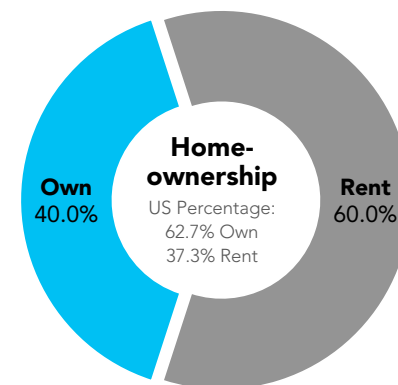
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

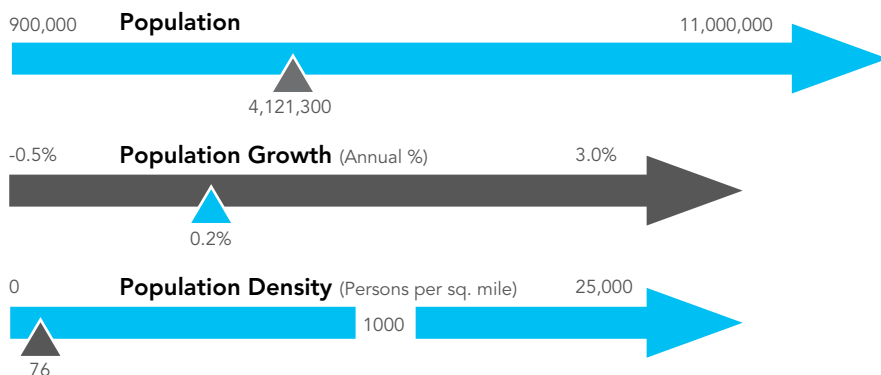
Average Rent:
\$710

US Average: \$1,038



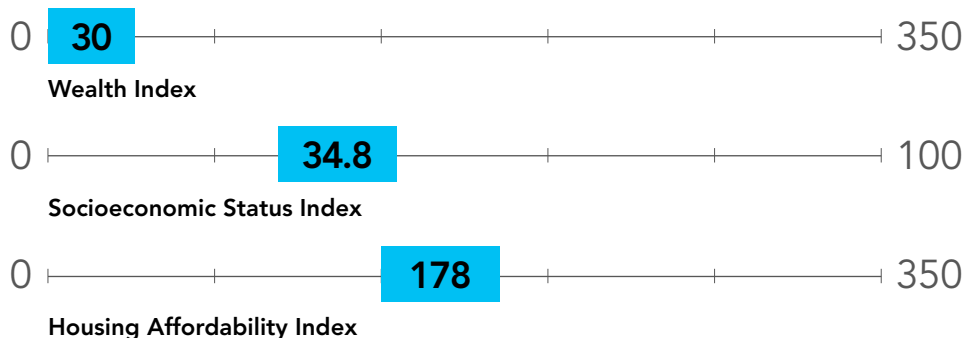
POPULATION CHARACTERISTICS

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 the US.





LifeMode Group: Middle Ground

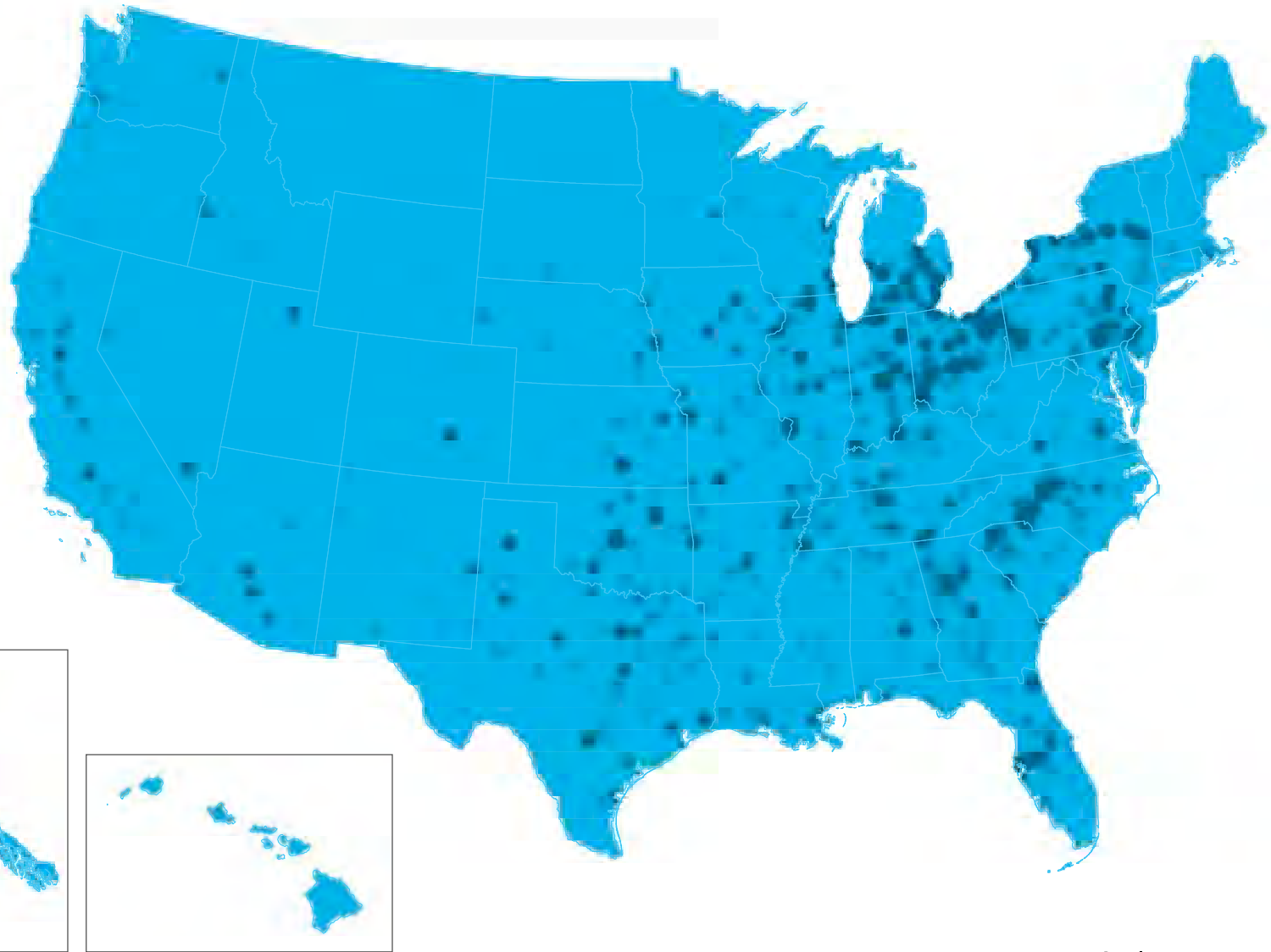
Hometown Heritage



TAPESTRY
SEGMENTATION
esri.com/tapestry

SEGMENT DENSITY

This map illustrates the density and distribution of the *Hometown Heritage* Tapestry Segment by households.



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**THE
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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.
- Homeownership 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 townhomes (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

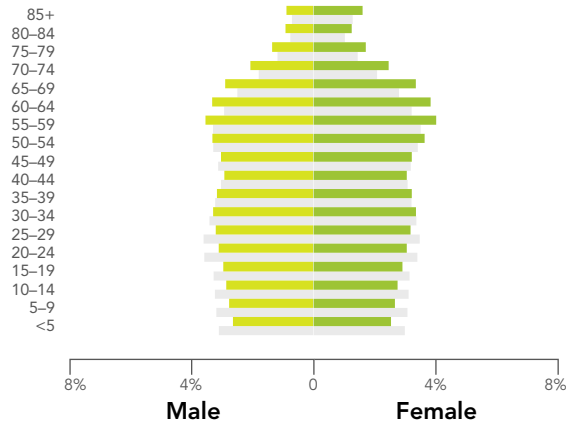
- College educated: 48% are graduates (Index 155); 77% with some college education.
- Higher labor force participation rate is at 67% (Index 108) with proportionately more two-worker households (Index 110).
- Median household income of \$73,000 reveals an affluent market with income supplemented by investments (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

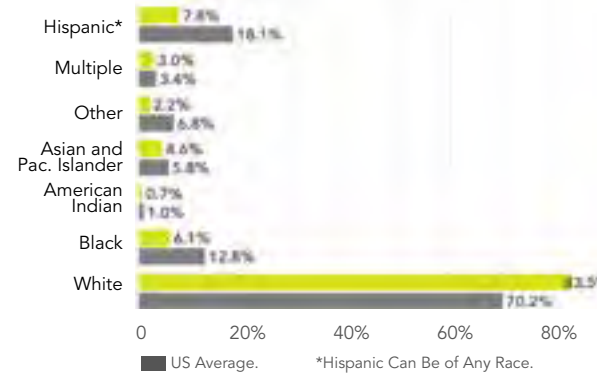
■ Indicates US



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



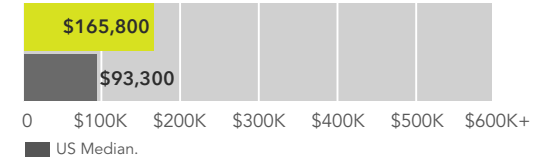
INCOME AND NET WORTH

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

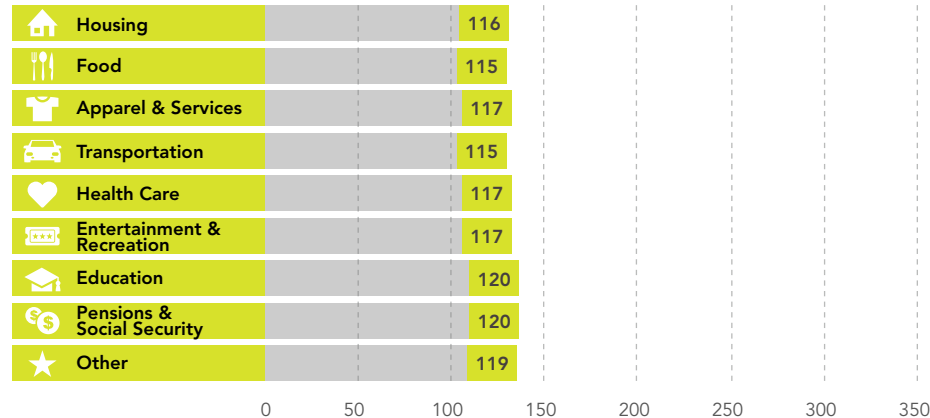


Median Net Worth



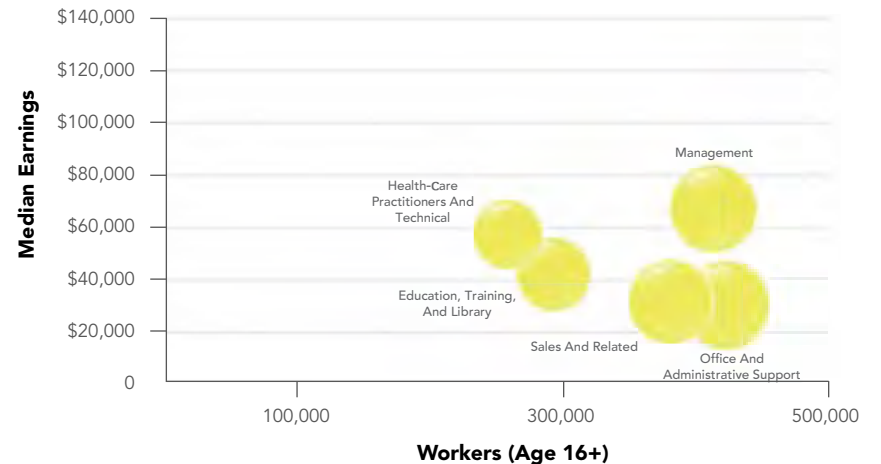
AVERAGE HOUSEHOLD BUDGET INDEX

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 MRI-Simmons.)

- 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

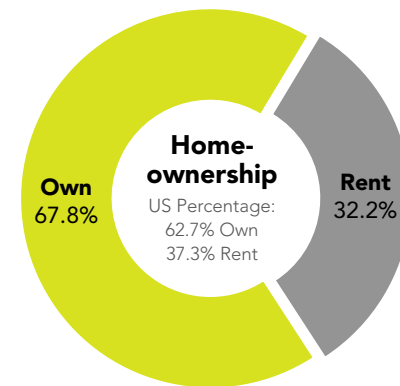
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



Typical Housing:
Single Family

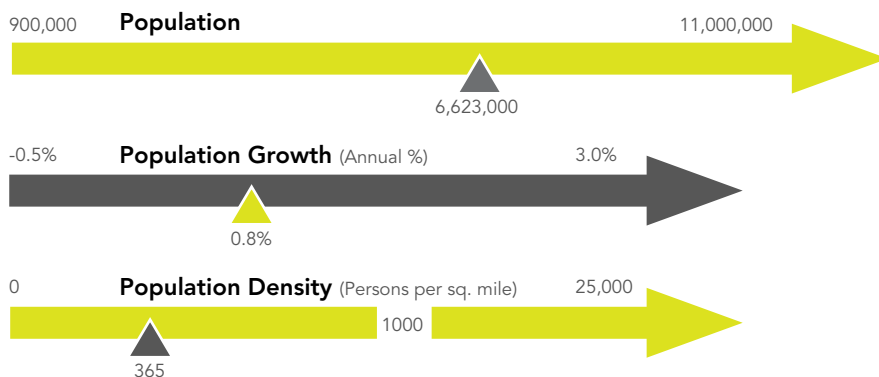
Median Value:
\$243,900

US Median: \$207,300



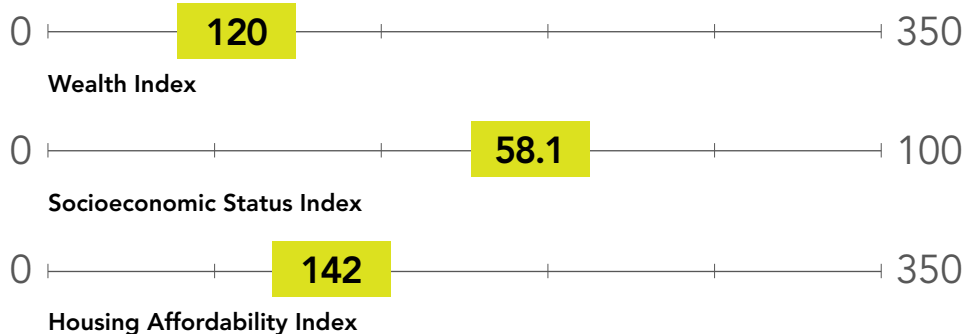
POPULATION CHARACTERISTICS

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.

