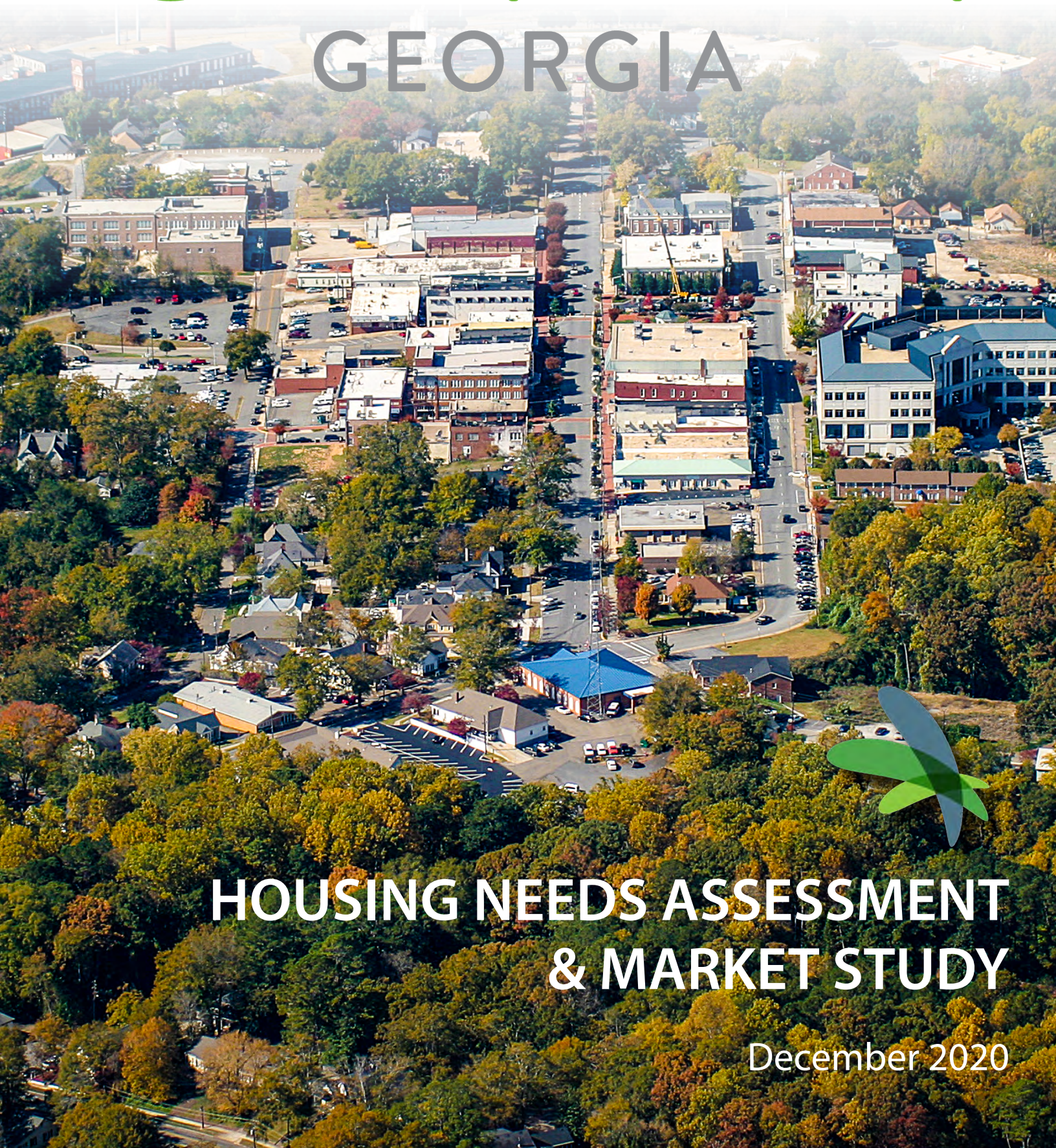


# CANTON

GEORGIA



## HOUSING NEEDS ASSESSMENT & MARKET STUDY

December 2020



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# ACKNOWLEDGMENTS

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Councilmember Sandy McGrew, Ward I  
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Councilmember Shawn Tolan, Ward II  
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THOMAS P. MILLER & ASSOCIATES

Thomas P. Miller & Associates, LLC (TPMA) envisions a world that thinks strategically, works collaboratively, and acts sustainably. In keeping with that vision, we empower organizations and communities through strategic partnerships and informed solutions that create positive, sustainable change. Our economic development approach aims to achieve community resiliency through economic diversity, resource alignment, and community vibrancy. TPMA's Economic Development and Community Resiliency Team provides expertise in assessing markets, identifying business sector opportunities, building innovation and entrepreneurial ecosystems, and conducting housing assessments to assist communities in developing solutions for local housing challenges consistent with community and economic development objectives.

The City of Canton Housing Needs Assessment and Market Study provides general housing trends analysis and specific site analysis as a guide for potential future housing development within the county. A variety of data sources were used to collect housing data for this study. Most notable were U.S. Census Bureau, ESRI Business Analyst Online, local MIBOR real estate sales data, and individual source rent information from other local stakeholders. Attempts were made to verify data as much as possible as it was used to provide population and housing market trend analysis.



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# INTRODUCTION

The City of Canton has experienced rapid growth over the past two decades. Despite a notable suburban style of development, the City also has achieved a significant number of rental and multi-family developments. It has been noted that the demand for rental units has continued to grow in recent years which is largely due to the growing number of household groups that represent young families and professionals. These groups are career-oriented and establishing their financial stability and are more likely to rent than own. Most notably, the City has a high share of household groups with larger than average household size, due to a large number of families. As a result, Canton also has a significant proportion of young adults and children below the age of 19.

As a historic mill town with access to a river, the City of Canton has a unique opportunity to not only sustain development and growth but leverage it to create a destination for residents and visitors to live, work, and play. As the City continues to build on previous planning efforts, the ability to support commercial and public space improvements with the strong growth trends will be a key step to success.

The current study aims to estimate the need for growth and to identify key areas for such growth. In addition to locations, the study will incorporate demographic information, national best practices, and stakeholder input to suggest how this development might look. As the City continues to grow, key challenge areas will include maintaining the balance of rental and for-sale options, avoiding the development of significant barriers to homeownership as the market grows, and the continued development of scalable and appropriate affordable housing options for moderate-income households.

The document is dividing into three sections.

## 01

### **BASELINE HOUSING INITIATIVE REPORT**

Includes a summary of major planning and housing-related documents and discussion about key findings related to housing development in Canton.

## 02

### **SOCIO-ECONOMIC TECHNICAL MEMORANDUM**

Covers major characteristics of the current population, estimates future population growth, and analyzes major household groups based on consumer profiles.

## 03

### **HOUSING STOCK, TRENDS, AND PROJECTIONS TECHNICAL MEMORANDUM**

Includes an analysis of the current housing stock and uses population projects and market trends to estimate the demand for future residential development.



# BASELINE HOUSING INITIATIVE REPORT



# PREVIOUS HOUSING STUDIES AND PLANS

## Canton 2040 Comprehensive Plan

The City of Canton recently published a 2040 comprehensive plan that set forth goals and objectives to be accomplished by 2040. This plan covers subject areas including economic development, housing, land use, transportation, community, and more. The section is very robust and intentional with how they view future development. Canton states that “It is not the intent to promote exclusivity in housing character, but to support a growing cultural, point in life, and economic diversity, as well as to maintain existing affordable housing stock and foster new lower and moderately priced housing opportunities in selected growth areas”. Some general housing information the report gives includes:

- » Approximately 42% of Canton’s housing stock is multi-unit which is greater than Cherokee County and Georgia;
- » Canton has a 5.6% vacancy rate which is greater than Cherokee county (2.3%) and Georgia (2.7%); and
- » Only 15% of owner-occupied units are valued at \$300,000 or more resulting in an average home value less than that of the county and state.

Late in the plan, Canton states their needs and opportunities. The needs highlight the need to attract housing development downtown and better enforcement of code-compliant to revamp blighted properties. For opportunities, Canton lists out increased connectivity of subdivisions through sidewalks, bike lanes, and trails; redevelopment of aging and blighted properties; and incorporate mixed-use housing downtown.

- » Canton has grown significantly in recent years with a population increase of 14,486 (170%) between the 2000 and 2010 censuses.
- » The only faster-growing city in Cherokee County is Woodstock.
- » Various sources estimate this growth to continue and for the population to reach between 41,349 and 51,745 by 2040.
- » The largest age group was between 0-14 (24.7%) which is slightly higher than Atlanta (21.2%) and Georgia (20.7%)
- » The smallest group is those over 65, which makes up only 11.2%.
- » A significant share of homes is 1-unit detached, which mirrors nearby communities.
- » The city has a higher vacancy rate compared to the county, 5.6% compared to 2.3%.
- » There is a lower portion of the city’s housing stock valued at \$300,000 or more (15%) which is lower than the average in the county.
- » Approximately a third of renters (30.2%) are paying more than 30% of their income in housing costs.
- » Housing Authority has a total of three operating complexes with a total of 143 units.

## Cherokee County Comprehensive Plan

With Canton being the seat of Cherokee County, the county's comprehensive plan includes and impacts Canton greatly. The plan was originally started in 2017 and updated late in 2018. The plan includes a vision and plan along with an implementation process. The plan does an overview of housing stating that over the past ten years median household income, median home value, and the number of building permits have increased. The plan mentions that the county is overwhelmingly single-family houses except for Canton and Woodstock which both have much greater diversity in the housing stock. One of the plans guiding principles is, "An array of housing choices is important to address the diverse needs of the population within our communities". The plan fleshes this out by mentioning the following:

- » Encourage a variety of housing stock to serve a range of incomes, age groups, and lifestyles to provide choices and opportunities;
- » Promote the development of housing for people with modest incomes by supporting such development with information on funding sources, appropriate locations, and the zoning and development process;
- » Remove constraints to the development of second units (i.e., accessory or granny flats) in appropriate areas to provide additional affordable housing opportunities in areas where infrastructure already exists;
- » Target the use of available CDBG funds for the Single-Family Owner-Occupied Rehabilitation program; and
- » Consider policies and regulations to support the development of quality affordable housing.

## Rental Residential Market Analysis, City of Canton

Noell Consulting Group was hired by the City of Canton to conduct a market analysis on rental residentials to allow the city to gain a greater understanding of the rental market in their city along with the surrounding areas. The report sites that Canton had significant population growth from 2000 to 2010, increasing 10.5% annually during that period. Annual growth rates decreased when looking at 2010 to 2015, with only 0.8% annual growth. Overall, in 2015 Cherokee county accounted for 3.7% of the MSA's population but was the reason for 5% of the MSA's growth over the past 5 years.

The report does an analysis of employment as the place and type of employment is a driver in where someone chooses to live. They found that the top industries in the local 10-mile area include professional, scientific, and technical services; retail trade; healthcare and social assistance; and administration & support. However, even though Canton is the largest workplace location, Atlanta was second even with the minimum hour commute.

From 2000 to 2014 Canton experienced population growth and with that came a higher population density in the city. When looking further at these demographics, there has been strong growth in family households, a rise in household income, and an increase in those 25 or older with a bachelor's degree or higher.

With the analysis of the city, county, and MSA, the report declares that Canton has a growing ability of absorption of additional units in its market. It was forecasted that Canton could absorb on average 184 units per year from 2016 to 2020.

## Out of Reach, The High Cost of Housing

Out of Reach is a study published every year by the National Low Income Housing Coalition. It looks at every state and analysis issues that surround housing and those who are low-income and cost burden. In 2018 they found that there isn't a single state, metropolitan area or county in the entire nation where a worker can earn the federal minimum wage of \$7.25/hour, or the prevailing state minimum wage in places that have a higher minimum wage, and afford a two-bedroom home at fair market rent while working a standard 40-hour week. In Georgia, there is no place that a worker could even afford a one-bedroom at a fair market rate. Accelerated redevelopment in prime real estate markets is a contributing factor, driving prices up and in some cases pushing long-time residents out. In addition, many communities in Georgia are experiencing a shrinking supply of affordable units as more lucrative housing options like luxury townhomes and condos are prioritized, or zoning changes prohibit or limit different types of housing options.

This context emphasizes the importance of retaining and expanding affordable housing. The county and city comprehensive plans point towards the fact that people move to Canton and the surrounding area due to the lower cost of living than other Atlanta suburban areas. So, if Canton replaces affordable options with higher price upscale housing, it may lose some of that appeal and draw.

## The Final Report of the Georgia House Study Committee on Workforce Housing

There is a Georgia House Study Committee in the Georgia House of Representatives that studies and releases reports about housing in the state. Their latest report published late in 2019 found that Georgia has a shortage of at least 350,000 new housing units. The report pointed at the subprime mortgage crisis in the late 2000s being a major cause due to the retraction of people from the industry. Yet with the retraction of houses being built, the Georgia population has continued to grow. The report continues and points at the Atlanta metro market and finds that affordability is starting to erode. They point at four factors that are driving this which include:

- » Labor costs;
- » Land values;
- » Prices for building materials; and
- » Land use regulations.

The report highlights land use regulations and states that they account for 24.3% of the final price for a new single-family home. This is also the factor that local jurisdictions have the most control over and can make the most impact by changing their policies around land use to allow for more affordable options to be implemented.





# **SOCIOECONOMIC TECHNICAL MEMORANDUM**

# POPULATION

As of 2019, Esri Business Analyst estimates that Canton's population was somewhere around 30,805. Using historic population data, from multiple sources, it is estimated that this is nearly three times the City's population in 2000. This rapid growth is expected to continue through the next ten years when the City could reach up to 34,565

residents in 2024 and 38,748 in 2029. These estimates are in line with the high growth scenarios established in the City's 2040 Comprehensive Plan. The characteristics of the households that fuel this growth mandate the key needs and strategies for the City of Canton moving forward.

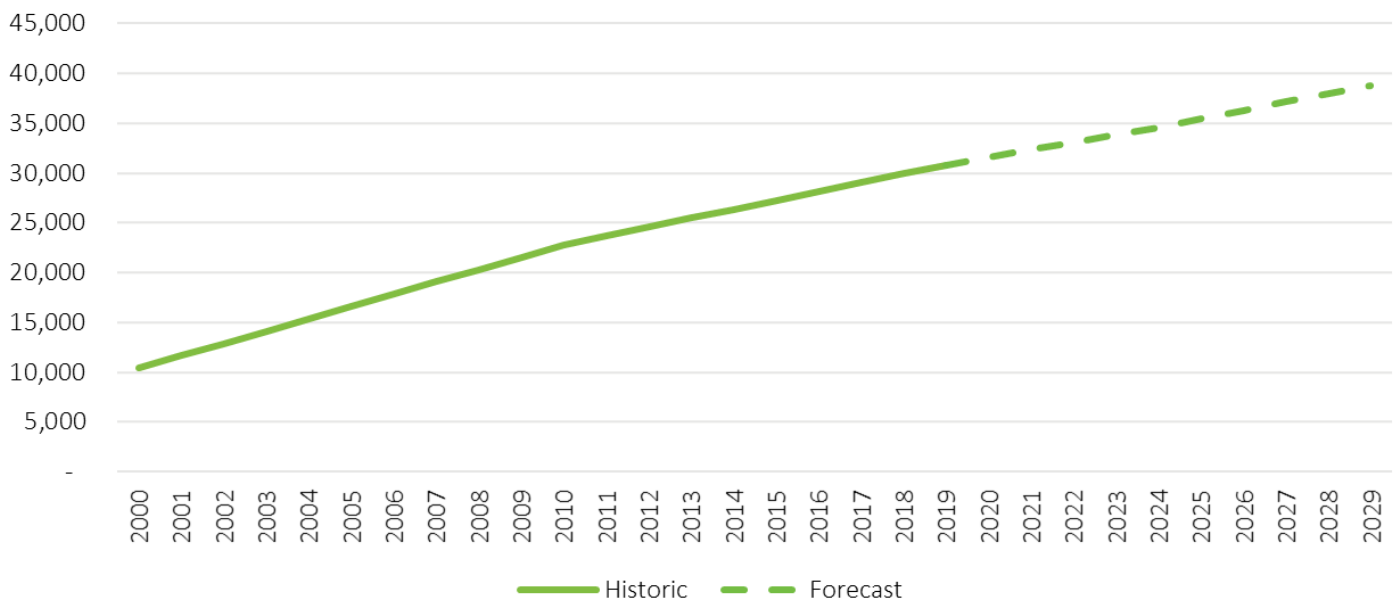


Figure 1 Historic and Projected Population Growth, City of Canton, GA

## WAGES AND INCOME

The range of household incomes in Canton demonstrates the City's diverse base of household groups, most notably with nearly a quarter of households earning above \$75,000 in 2019. However, almost half of households earn between \$25,000 and \$75,000 indicating a significant portion of the population at risk of being cost-burdened by housing costs. On a national level, the share households earning between \$30,000 and \$45,000 that are cost-burdened has grown significantly for some metropolitan areas in recent years. This trend highlights the potential demand for innovative housing products and finance techniques to deliver both for-sale and rental options missing from the residential construction market. The large share of households in Canton within this range suggests that the City should focus on programs and

housing products that are tailored to the means of this group to rent and purchase homes within an affordable range. Looking at the comparable communities reinforces this recommendation as it is evident that the household income is more concentrated in the lower-income bands. The communities of Woodstock, Kennesaw, and Acworth were chosen for comparison as they are similar to Canton in location (about an hour north of Atlanta) and similar in population. Woodstock appears to have the most wealth, while Kennesaw and Acworth are more moderate and very similar to each other. Developing more affordable homes in Canton could benefit the community and attract new residents from neighboring communities with a higher residential cost burden.



Figure 2: Distribution of household incomes in Canton, GA



Figure 3 breaks-out household income in the City of Canton by age cohorts. Residents younger than 25 and older than 75 make-up the largest percentage of household incomes less than \$50,000. Residents younger than 25 and older than 75 make up the lowest percentage of households earning more than \$75,000. This could suggest that Canton’s youngest and oldest

residents are more likely to be cost-burdened by housing. Qualitative data suggests that 22% of the housing stock is senior tax-exempt. These senior residents may be reflected in this lower-income but in reality, they are wealthier and likely retired with sufficient savings and not considered cost-burdened.

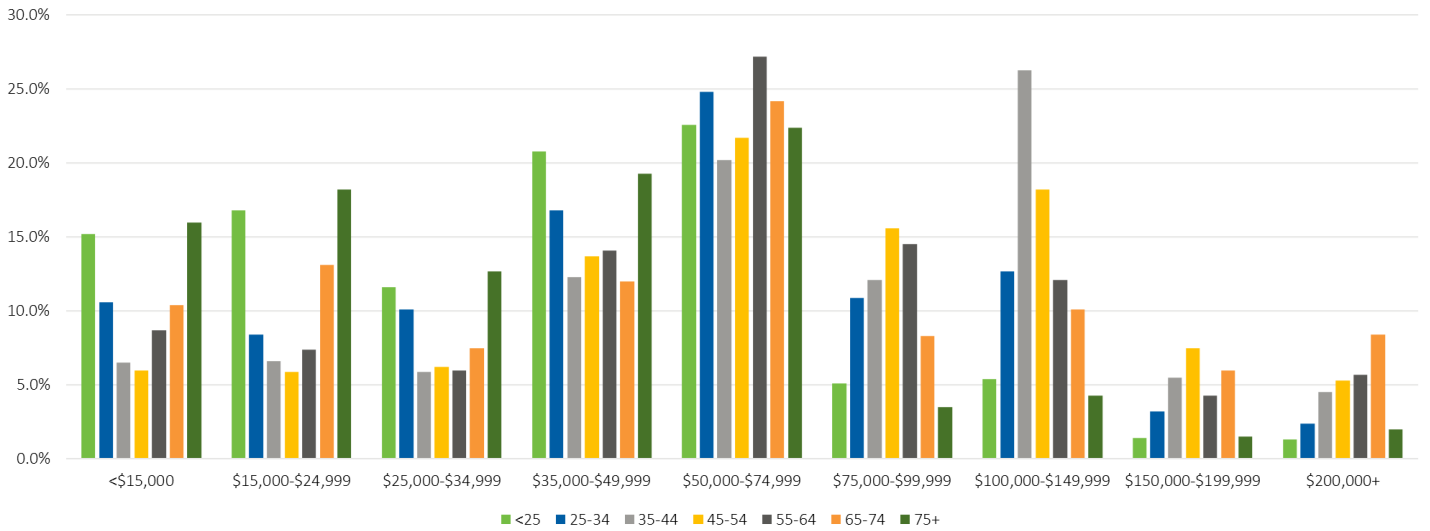


Figure 3: City of Canton Household Income by Age

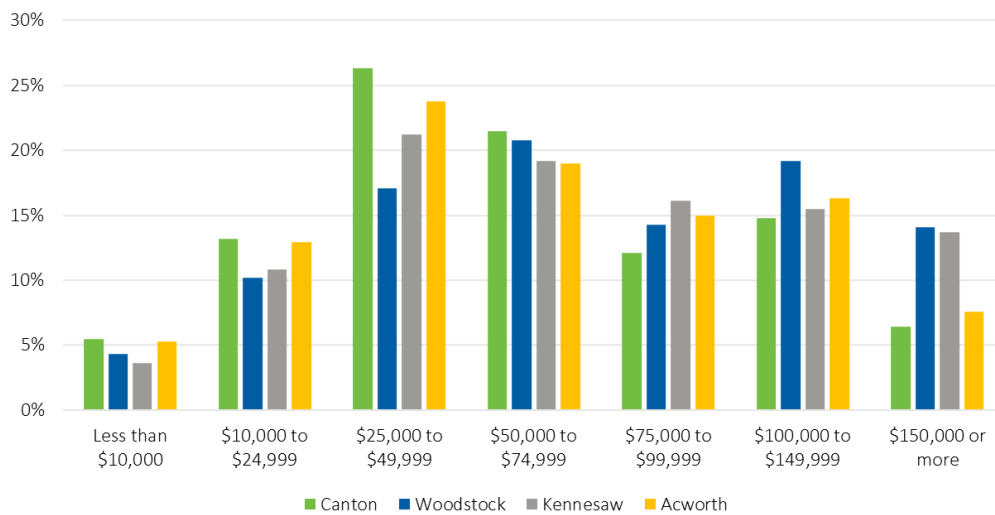


Figure 4: Distribution of household incomes in Comparable Communities, GA  
Commuting

Commuting data taken from On the Map estimates based on the 2017 American Community Survey.

On a daily basis, Canton gains population due to in-commuters from nearby cities. Among these include large shares of workers that live in Woodstock, Holly Springs, Atlanta, and Sandy Springs. OnTheMap estimates approximately 9,564 individuals entered Canton daily for work in 2017. At the same time, roughly 8,167 Canton residents left for work to jobs located in Atlanta, Alpharetta, Sandy Springs, and Marietta. Given its proximity to Atlanta, Canton's ability to draw in additional population for work is indicative of a strong economy. In determining the needs of potential future

residents, the population of in-commuters is likely to provide context for the most likely target population for additional residential growth for the City. Overall, about 9.1% of the workforce that lives in Canton, also works in Canton rather than leaving the city for employment. When looking at the data for comparable communities, Canton's share of the residents working in the community is the greatest. Woodstock has 6.3% of residents living and working there, while Kennesaw has 5.8% and Acworth has 3.6%.



Figure 5: Commuter In-Flow and Out-Flow, Canton, GA

Workers commuting into Canton come from a range of nearby municipalities in Cherokee County, with the largest share originated from Woodstock, Holly Springs, Atlanta, and Sandy Springs in order. As mentioned above, the types of individuals coming from these areas are likely to make up Canton's potential residential growth market. These communities will also serve as benchmarks for comparison when determining what housing products

can be developed that either meet market demand or distinguish Canton from its neighbors. The population of those commuting elsewhere for work shows a higher share of workers commuting to Atlanta for work. This is expected given the relative size and number of jobs concentrated in Atlanta. Roughly 7.6% of those who live in Canton but work elsewhere are employed in Atlanta.

Home City	Count	Share
Canton	818	7.9%
Woodstock	239	2.3%
Holly Springs	173	1.7%
Atlanta	166	1.6%
Sandy Springs	92	0.9%

Table 1: Job Count by Place, Where Canton Workers Live, 2017

Destination City	Count	Share
Canton	818	9.1%
Atlanta	683	7.6%
Sandy Springs	428	4.8%
Alpharetta	426	4.7%
Marietta	351	3.9%

Table 2: Job Count by Destination, Where Canton Residents Work, 2017

Commuting data taken from On the Map estimates based on the 2017 American Community Survey.

# MAJOR OCCUPATIONS

The MIT Living Wage Calculator provides an estimate of the cost of living to meet the minimum quality of life standard for an area based on household consumption patterns. The living wage for a family of four with both parents working is \$16.07 per hour in pre-tax income. This would equal roughly \$32,140 for an individual pre-tax income. This cost of living is the same for both Cherokee County and the Atlanta MSA as a whole. Five of the top ten occupations in Cherokee County, determined by Standard Occupation Code (SOC) major group, have a median annual earning less than this. Among them, the three largest occupations that comprise 39% of 2019

jobs each earn \$15 or less per hour and include Office and Administrative Support Occupations; Sales and Related Occupations; and Food Preparation and Serving Related Occupations. These three major groups together represent 26,561 individuals whose income puts them at risk to face challenges in the housing market. Looking ahead, however, the largest growth in jobs is expected for Healthcare Practitioners and Technical Occupations that make up just 5% of the county's employment. This occupation group has a median annual earning that is significantly higher and may indicate overall wage growth for the County and as a result, Canton.

Description	Share of 2019 Jobs	2019 Jobs	2024 Jobs	2019-2024 Change	Median Hourly Earnings	Median Annual Earnings
Office and Administrative Support Occupations	13%	8,658	9,512	10%	\$15	\$31,731
Sales and Related Occupations	13%	8,594	9,775	14%	\$11	\$22,579
Food Preparation and Serving Related Occupations	13%	8,309	9,751	17%	\$9	\$17,932
Education, Training, and Library Occupations	8%	4,983	5,454	9%	\$21	\$42,892
Transportation and Material Moving Occupations	7%	4,351	4,987	15%	\$14	\$28,824
Production Occupations	6%	4,182	4,817	15%	\$15	\$31,049
Management Occupations	5%	3,517	3,981	13%	\$46	\$94,972
Construction and Extraction Occupations	5%	3,444	3,902	13%	\$18	\$36,739
Healthcare Practitioners and Technical Occupations	5%	3,201	3,850	20%	\$29	\$60,917
Business and Financial Operations Occupations	4%	2,520	2,827	12%	\$29	\$60,304

Table 3: Top Occupations in Cherokee County, Grouped by Major Group



Looking at detailed occupations reinforces the high number of workers in Cherokee County with wages that fall below the calculated living wage for a family of four. While these individuals are not guaranteed to be cost-burdened they do represent a population that may be at risk in the housing market or who may lack the means to make first-time home purchases. While they will not comprise the bulk of demand, the number of workers in

these job classes should be factored into mixed-income developments as part of a balanced strategy to maintain a well-functioning housing market.

Description	Share of 2019 Jobs	2019 Jobs	2024 Jobs	2019-2024 Change	Median Hourly Earnings	Median Annual Earnings
Retail Salespersons	5%	2,982	3,503	17%	\$10	\$19,863
Cashiers	4%	2,529	2,776	10%	\$9	\$18,709
Combined Food Preparation and Serving Workers, Including Fast Food	4%	2,445	3,025	24%	\$8	\$17,158
Waiters and Waitresses	3%	1,790	2,002	12%	\$8	\$17,083
General and Operations Managers	2%	1,298	1,466	13%	\$44	\$92,093
Customer Service Representatives	2%	1,255	1,364	9%	\$15	\$31,360
Stock Clerks and Order Fillers	2%	1,226	1,398	14%	\$11	\$23,124
Laborers and Freight, Stock, and Material Movers, Hand	2%	1,159	1,366	18%	\$12	\$24,475
Elementary School Teachers, Except Special Education	2%	1,156	1,261	9%	\$25	\$52,443
Office Clerks, General	2%	1,041	1,145	10%	\$13	\$26,915

Table 4: Top Occupations in Cherokee County, Grouped by Detailed Occupation

Based on the North American Industry Classification System, the largest employment sector in Cherokee County is Retail Trade with 17% of the jobs, expected to grow by 13% in 2024. These 11,015 jobs make up a group of residents with average earnings of \$33,843 per job. Similar to the household income distribution for Canton the share of jobs across sectors shows a mix of moderate and high-income sectors. Expected growth includes

significant projected growth by 2024 for Accommodation and Food Services, Health Care and Social Assistance, Manufacturing, and Administrative. In general, this can be taken as an indication that no single industry is expected to dominate job growth in Cherokee County and that high-income households may make up a larger share of the population over the next decade.

Description	Share of 2019 Jobs	2019 Jobs	2024 Jobs	2019-2024 Change	Avg. Earnings Per Job
Retail Trade	17%	11,015	12,487	13%	\$33,843
Government	14%	9,417	10,028	6%	\$61,390
Accommodation and Food Services	12%	7,939	9,338	18%	\$19,260
Health Care and Social Assistance	11%	7,027	8,402	20%	\$57,210
Manufacturing	9%	5,976	6,998	17%	\$65,559
Construction	8%	5,034	5,568	11%	\$66,625
Administrative and Support and Waste Management and Remediation Services	6%	3,806	4,436	17%	\$56,920
Other Services (except Public Administration)	4%	2,893	3,151	9%	\$34,345
Professional, Scientific, and Technical Services	4%	2,833	3,199	13%	\$74,048
Wholesale Trade	3%	2,054	2,237	9%	\$81,485

Table 5: Top Industries by Number of Jobs, Cherokee County, Grouped by Sector'

# HOUSEHOLD CHARACTERISTICS

Understanding the current characteristics of households helps better understand the market of housing demand and future outlooks. Looking at educational attainment, Canton is a well-educated city with almost 60% of people having at least some college education. This is an indicator of higher income potential and therefore

higher median home value. This matches the trend of the industry and sectoral growth for higher-income groups in Cherokee County. Additionally, when looking at the median earnings by education level, there is a significant increase when someone has a bachelor's degree.

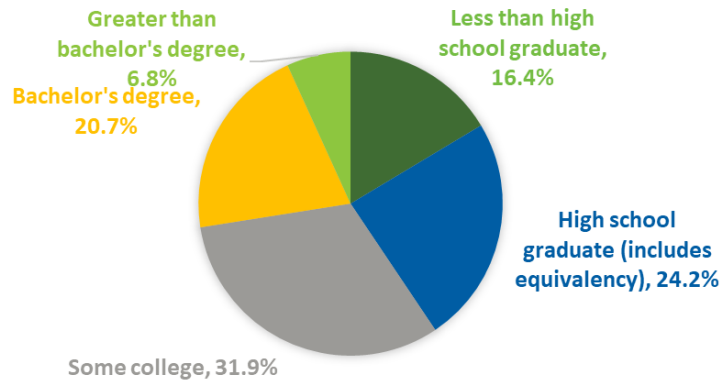


Figure 6: Educational Attainment, City of Canton, GA

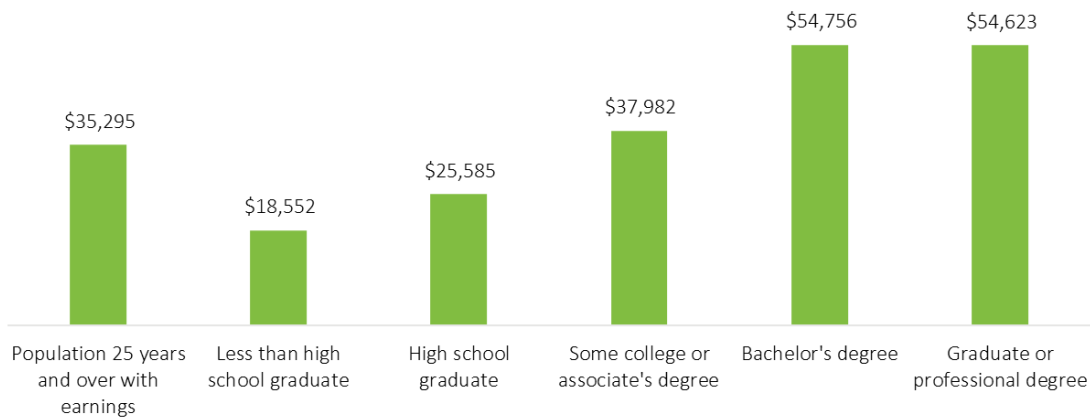


Figure 7: Median Earnings by Educational Attainment, City of Canton, GA

Source: 2018 ACS 5 Year Estimates, Educational Attainment Table  
 Source: 2018 ACS 5 Year Estimates, Educational Attainment Table

In some communities, educational attainment is generational and concentrated among certain age bands. However, in Canton that seems to not be the case as the attainment is relatively similar among the major age groups. When further looking at attainment according to race and ethnicity, the attainment is also consistent

across races. The one difference is the educational attainment for those of Hispanic or Latino Origin. They have significantly less education attainment with only 50% have graduated high school or greater. This contrasts with the overall population which over 80% have graduated high school.

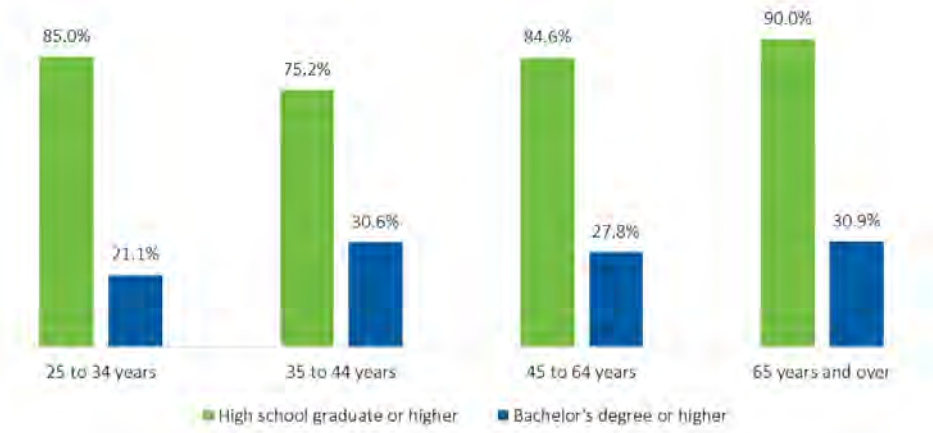


Figure 8: Educational Attainment by Age, City of Canton, GA

Most notable about Canton’s population is the high number of residents under 19 years of age. Nearly 30% of both the male and female population fall within this category, and particularly nearly 1 in 5 Canton residents are between the ages of 5 and 19. Residents are relatively evenly spread across all other age groups. This highlights the City’s potential to provide a significant workforce for industry growth across the County. The high share of young individuals would imply a coming need for

units suited to young professionals and young families. This age group represents an opportunity for sustained growth from within Canton as individuals begin careers and families and choose where to rent and purchase their first homes. Given the high share of residents with a college education, this also indicates that many of those aged 20 and above are likely part of a well-educated and potentially skilled workforce that will drive the future high-wage growth for the County.

Source: 2018 ACS 5 Year Estimates, Age and Sex Table  
 Source: 2018 ACS 5 Year Estimates, Educational Attainment Table



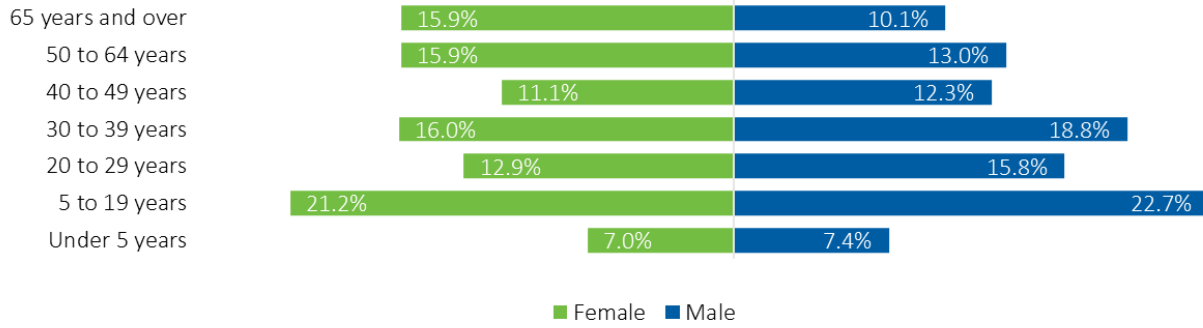


Figure 9: Age of Population, City of Canton, GA

The largest category of both renter and homeowner in Canton is two-person households. The next largest group includes renter-occupied units with 4 or more people and one-person owned households. In general, it appears that owner-occupied households tend to be smaller than renter-occupied households. This may be due to shared units between non-family individuals, or also a higher than average number of young families. A mix of household size underscores the importance of diverse single and multi-family housing units in Canton. This also highlights the importance of housing products like higher-density single-family units and smaller first-time-home-buyer options such as duplexes or townhomes

that can promote higher densities while maintaining a sense of place and neighborhood. When looking at comparable communities of Woodstock, Kennesaw, and Acworth, each community is comprised uniquely. Canton has the most similarities to Kennesaw with the number of persons per household, while it is the most in contrast to Acworth. Overall, Acworth has the evenest spread of housing stock by occupancy, but these differences could be a factor of different population characteristic factors such as a higher number of families or a higher number of young singles in one community versus another. Housing sizes need to be diverse, but communities must address the greatest needs of the current and future residents.



Figure 10: Number of Occupants, City of Canton, GA

Housing cost burden is defined as spending over 30% of gross income on rent or mortgage. For the City of Canton, the most cost-burdened households are those earning less than \$35,000. This is characteristic of this household group as few housing markets can naturally provide housing that is priced low enough for low-income households. Taking into consideration the largest

occupations in Cherokee County, these households are most likely those in the service industry and some of the lower-end occupations in the production or logistics related occupations. In line with trends in other growing metropolitan areas, however, there is still a notable proportion of households earning between \$35,000 and \$75,000 that are also cost-burdened.

Household Income	Owner-Occupied			Renter-Occupied		
	Total Households	Cost-Burdened	Share Cost-Burdened	Total Households	Cost-Burdened	Share Cost-Burdened
Less than \$20,000	454	371	82%	656	575	88%
\$20,000 to \$34,999	577	473	82%	922	922	100%
\$35,000 to \$49,999	474	111	23%	1,111	493	44%
\$50,000 to \$74,999	1,208	219	18%	861	233	27%
\$75,000 or more	2,086	25	1%	1,143	0	0%

Table 6: Share of Cost Burdened Households, Canton, GA

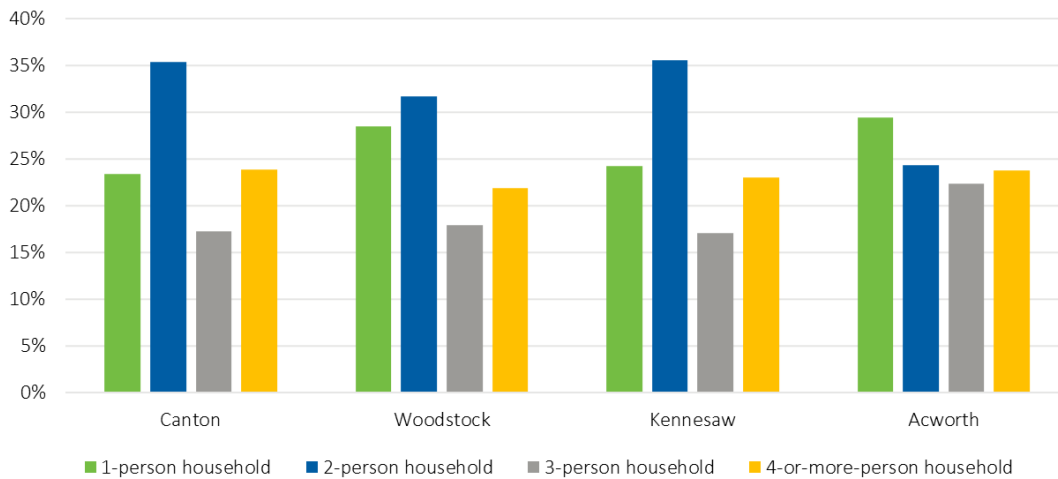


Figure 11: Number of Occupants, Comparative Communities, GA

Slight variations in total households between ACS tables occurs due to rounding error, however the general magnitude and distribution of total households is assumed to be accurate.

Source: 2018 ACS 5 Year Estimates, Financial Characteristics Table

# COMMUNITY TAPESTRIES

ESRI’s Tapestry Segmentation Profiles are a consumer analysis tool that identifies distinctive markets in the US based on socioeconomic and demographic characteristics to provide an accurate, comprehensive profile of US consumers. In essence, each tapestry provides consumer market profiles that categorize households based on their preference for goods, leisure activities, and housing choice. These profiles estimate the average national growth, demographic characteristics, and buying power of such households. Using these household tapestry profiles; the City of Canton can identify the broad categories of households already present in the city and gauge the types of development likely to attract target groups.’

The following are the tapestries that make up most Canton households. The Canton tapestries show a concentration of family and young professional demographics across income categories. General descriptions of the Canton tapestries are below.

- **Up and Coming Families** – Younger and more mobile residents just starting their family. They are one of the fastest-growing markets in America.
- **Middleburg** – Semirural subdivision residents. Typically, conservative, and family-oriented consumers.

- **Green Acres** – Residents who typically grew up with a country lifestyle and still prefer some of those lifestyle tendencies such as self-reliance.
- **Front Porches** – Young families that are still starting out and tend to live in older homes, duplexes, or townhomes.
- **NeWest Residents** – Young and new to career Hispanic residents who are still getting their roots.
- **Hardscrabble Road** – More established families and single parents in urban cores, typically in older homes.

Several of the predominant tapestry groups that make up Canton are over-represented in Canton compared to Cherokee County and the United States. For example, roughly 1 in 5 households in Canton are classified as Up and Coming Families. This is nearly double the number of households in this group in Cherokee County and nearly ten times that of the US. Each household group shows a similarly high representation in the Canton-Cherokee County Area compared to the nation. Three key factors that the household profiles for Canton signal are: Young and established families, semirural or rural lifestyles, and a growing number of Hispanic households.

Tapestry Segment	Canton	Cherokee County	United States
Up and Coming Families (7A)	22.8%	9.1%	2.5%
Middleburg (4C)	20.9%	17.9%	2.9%
Green Acres (6A)	17.7%	11.0%	3.2%
Front Porches (8E)	17.2%	2.5%	1.6%
NeWest Residents (13C)	17.0%	2.0%	0.8%
Hardscrabble Road (8G)	4.4%	0.5%	1.2%

Table 7: Tapestries with Greatest Concentration

The three largest of the household groups in Canton tend to own at a higher rate than rent, most likely a result of family size, young families establishing homeownership, and also financial means to do so. Similarly, the largest group, Up and Coming Families, is also one of the fastest-growing segments with 2.8% annual growth nationally. It is expected that in this group alone at least an additional 257 homeowners will be generated by 2024 based on this group's growth rate. This does not factor in the significant growth expected in Canton based on recent growth trends.

Similar to the estimated household incomes for Canton, the major tapestry groups in the City have various

median household incomes, likely indicative of a mix of household types, sizes, and occupations. The largest group, Up and Coming Families, tend to have higher household incomes with a median of \$72,000 per household. The third-largest group also has a high median household income of \$76,800. Despite higher median ages for each group, the fact that most represent families likely contributes to the high population of residents under 19 years of age in Canton. In terms of housing needs, each of these groups has an average household size of more than 2.5, with the largest average household size being 3.35 people per NeWest Residents household. This likely relates to the family orientation of each of these groups as well.

Tapestry Segment	2019 HHs	% Own	% Rent	Annual Growth	2024 Households	Homeowner Growth	Renter Growth
Up and Coming Families (7A)	2,487	73.9%	26.1%	2.80%	2,835	257	91
Middleburg (4C)	2,280	73.4%	26.6%	1.40%	2,440	117	42
Green Acres (6A)	1,924	86.1%	13.9%	0.90%	2,011	75	12
Front Porches (8E)	1,871	46.6%	53.4%	0.60%	1,927	26	30
NeWest Residents (13C)	1,855	16.6%	83.4%	1.10%	1,957	17	85
Hardscrabble Road (8G)	474	40.0%	60.0%	0.20%	479	2	3

Table 8: Tapestry Forecasts

Tapestry Segment	Median Household Income	Median Age	Average Household Size	Wealth Index	Socioeconomic Status Index
Up and Coming Families (7A)	\$72,000	31.4	3.12	85	116
Middleburg (4C)	\$59,800	36.1	2.75	86	106
Green Acres (6A)	\$76,800	43.9	2.7	133	130
Front Porches (8E)	\$43,700	34.9	2.57	47	81
NeWest Residents (13C)	\$30,200	27.3	3.35	29	65
Hardscrabble Road (8G)	\$28,200	32.4	2.66	30	59

Table 9: Tapestry Statistics at the National Level





# **HOUSING STOCK, TRENDS, & PROJECTIONS**

## EXISTING HOUSING STOCK

In total there is a housing stock of roughly 10,046 units. The majority of units have been built in the past 30 years to help support the City's growth. Most notably, there was significant construction in the early 2000s that has since slowed down. This boom has helped supply the market, yet as the City continues to grow, a concerted strategy around types and size of units will ensure that

growth is consistent with maintaining the City's current qualities while meeting the needs of future residents to keep Canton a desirable place to live, work, and play for a diverse range of households. Despite the relatively young housing stock, there are likely a number of units constructed before 2000 that require rehab programs to maintain value and overall quality of neighborhoods.

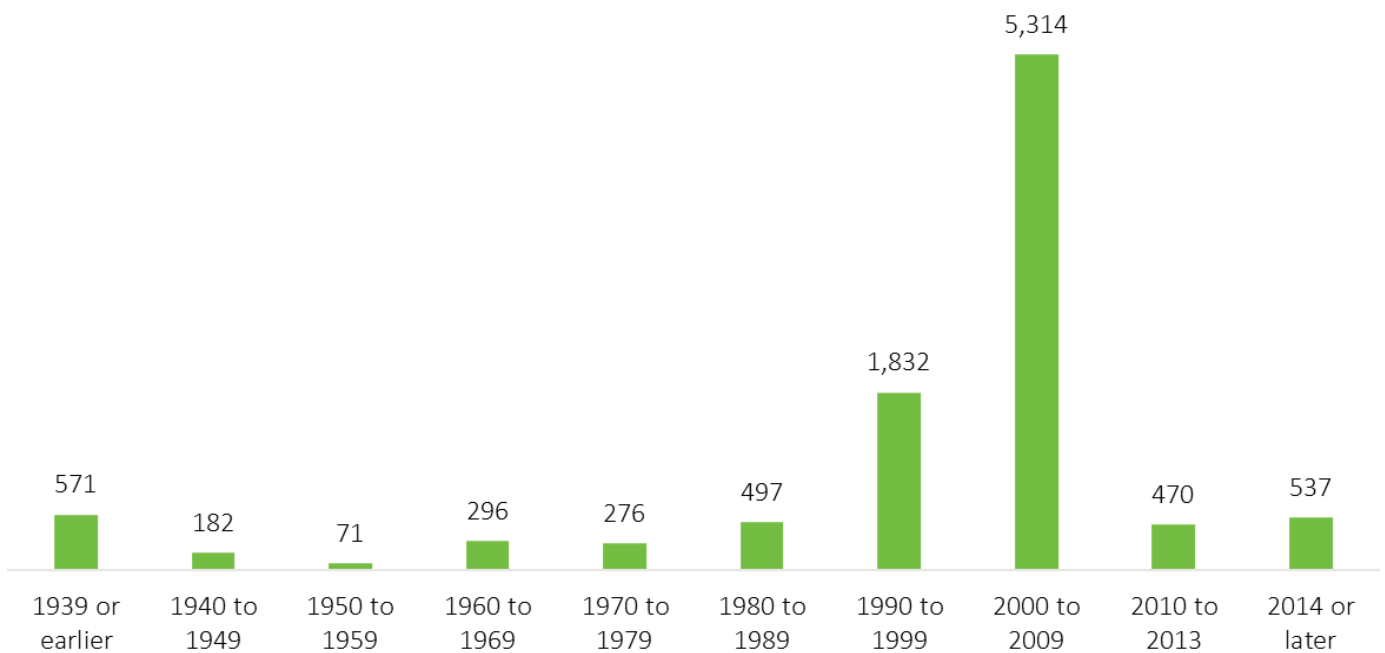


Figure 12: Year Housing Structure Built, City of Canton, GA

When comparing the year of structure built between Canton and peer communities, Canton is an outlier in two categories, those structures built 1939 or earlier and built from 2000 to 2009. During these two periods, Canton experienced more residential construction than

peer communities. All communities saw a boom between 1980 and 2009. Kennesaw and Acworth experienced significant growth between 1990 and 1999 while Canton and Woodstock experienced more growth from 2000 to 2009.

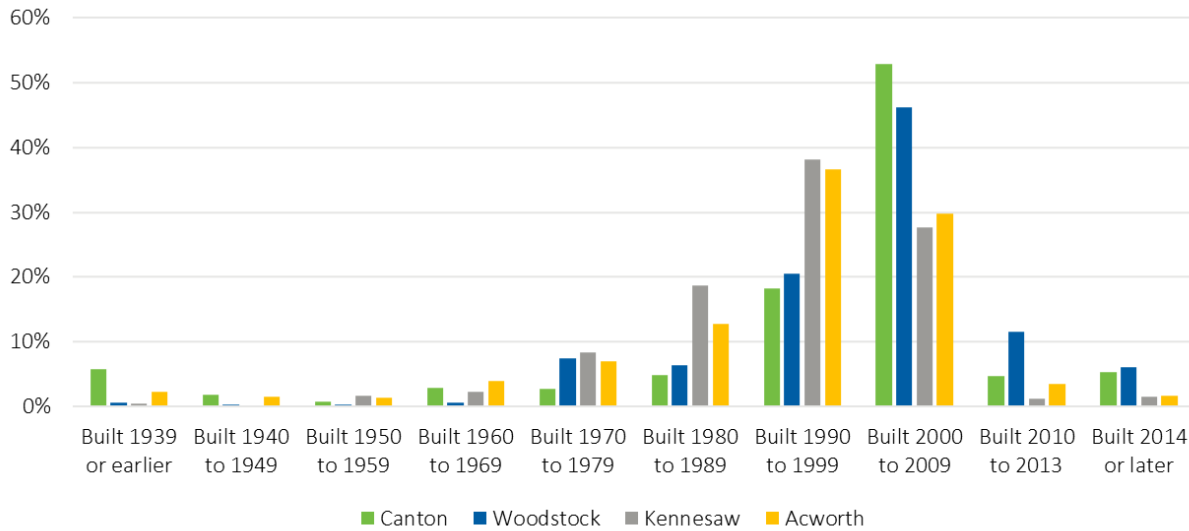
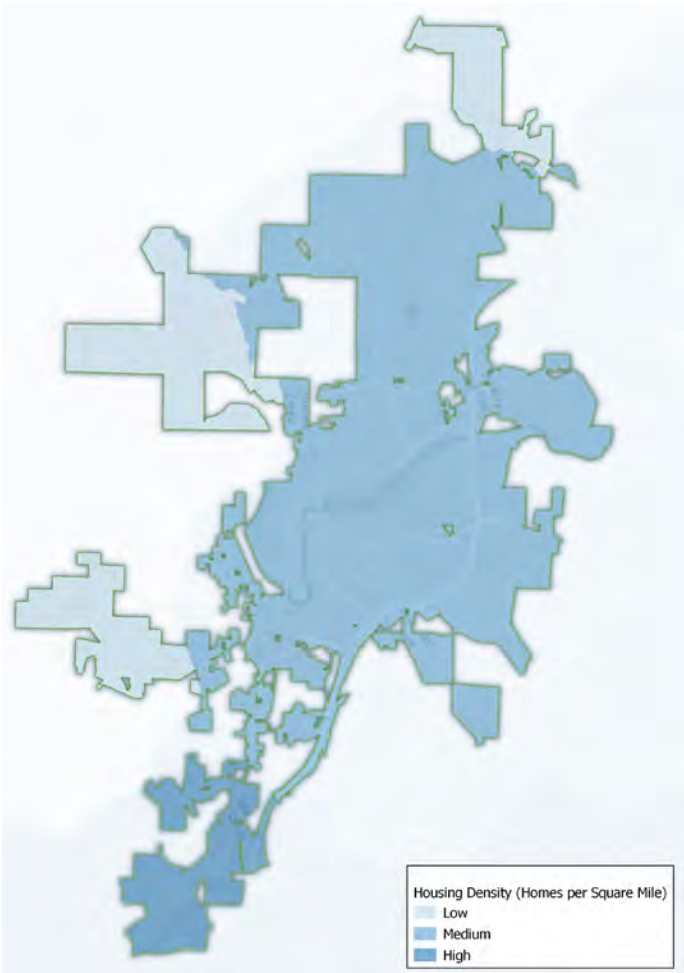


Figure 13: Year Housing Structure Built, Comparative Communities, GA

Comparing census tracts within Canton illustrates the concentration of relatively new housing units in southern and western portions of the City. Not surprisingly, the concentration of older units tends to be located centrally within the City where the median year structures were built is prior to 1988. As the city has expanded, different directions demonstrate a mix of development approaches that have yielded distinct areas of the City with very different densities. The higher density housing (more than 300 homes per square mile) is predominantly

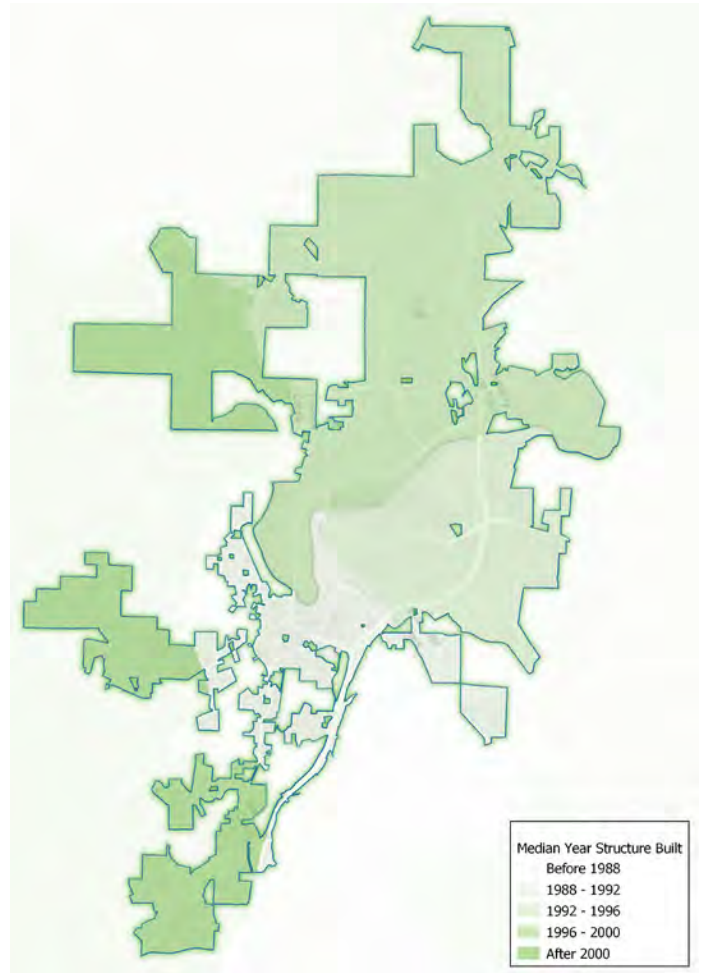
located in the southern portion of the city. This area may embody the high share of rental and multi-family units present in Canton in comparison to surrounding areas. Toward the west, the City has medium density areas that likely include single-family neighborhoods that can support additional infill development or owner-occupied strategies such as owner-occupied rehab and other forms of direct assistance to promote and maintain homeownership for families.





Map 1: Housing Density in Canton, GA

Home values in Canton follow a normal distribution with the bulk of homes values between \$150,000 and \$199,999 (27.5% of homes) and \$200,000 and \$299,999 (28.0%). Despite a large supply of high-end homes, the City of Canton does have a notable share of homes valued at below \$150,000 which are most likely suitable



Map 2: Median Year Structure Built, Canton, GA

for first-time homebuyers and young families. As the City looks to develop new housing, there will likely be a higher demand for single-family homes at this price point. Given the diversity of price points, there is likely a healthy supply of housing as individuals' incomes grow and they seek larger or more expensive housing options.



Figure 14: Gross Home Values, City of Canton, GA

When looking at comparable communities, Woodstock has a larger stock of higher value homes. While Canton trails, it has more high-value homes than Kennesaw and Acworth, especially in the \$200,000 to \$299,999 range. Kennesaw and Acworth have a more diversified

stock of home values across bands, though the highest percentage of homes for all communities is concentrated in the \$150,000 to \$199,999 and \$200,000 to \$299,999 ranges.

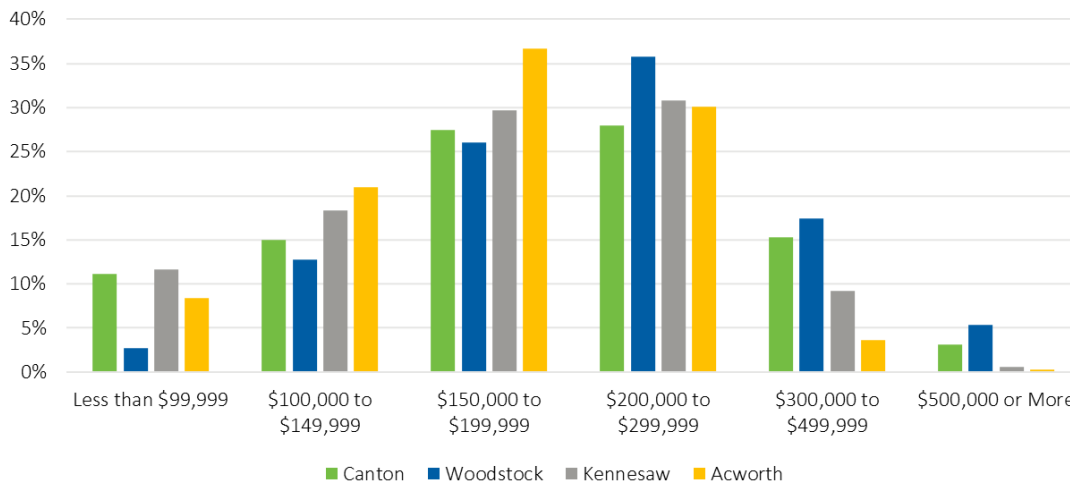


Figure 15 Gross Home Values, Comparative Communities, GA

In addition, the City has a significant number of rental units with monthly costs estimated between \$500 and \$1,000. Nearly half (43%) of units at this level indicates a large share of affordable rental units in Canton. As the City considers future developments, a balanced supply of rental and multi-family units at various price ranges will allow for a similar mix of households. As the City grows the demand for higher-end rental products may

increase, especially when considering the growth of certain household groups, projected population, and also the types of jobs expected to grow the most in Cherokee County. This is reinforced when looking at comparable communities. Canton has a larger stock of more affordable rental units but has fewer units in the range of \$1,000 to \$2,000.

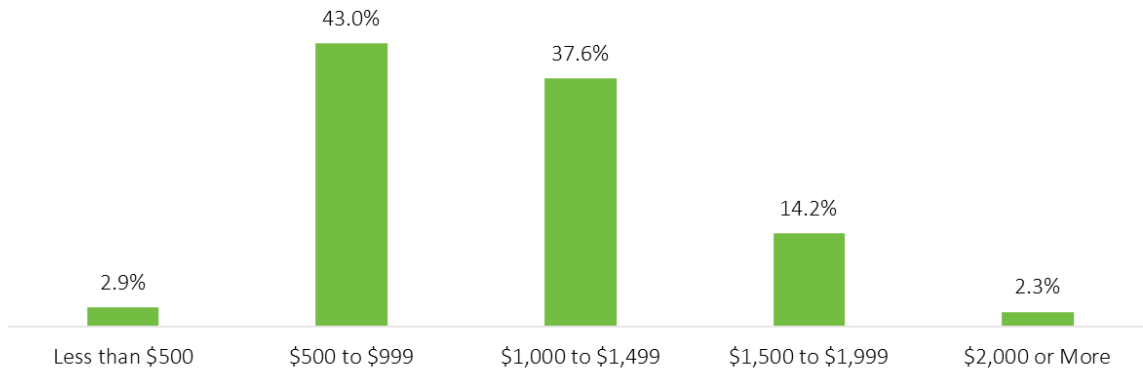


Figure 16: Gross Rent Values, City of Canton, GA

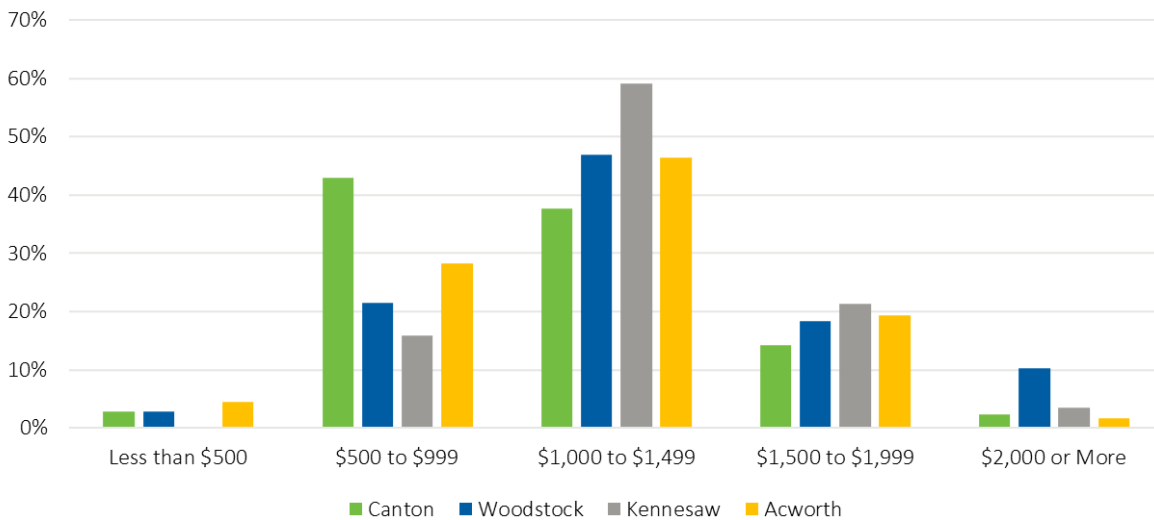
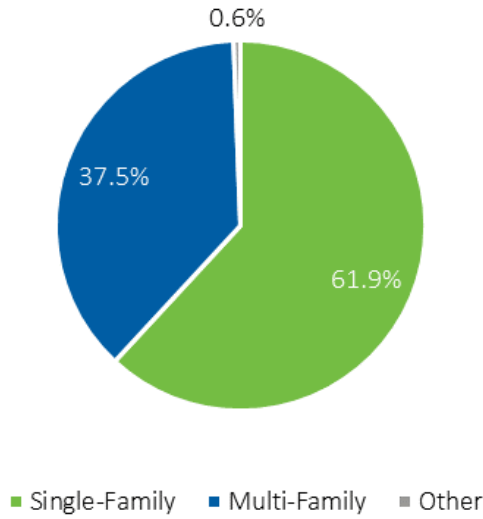


Figure 17: Gross Rent Values, Comparative Communities, GA



The City of Canton has an attractive mix of single-family, as well as multi-family housing units. Specifically, the large share of multi-family units provides a diverse housing base additional residential option. This makes the city more appealing to a wide range of lifestyles, demographics, and incomes. This is a trend among the other communities with Woodstock and Kennesaw being very similar, and Acworth having slightly less multi-family units. To remain competitive among peer communities, Canton must maintain a mix of single- and multi-family homes.

The number of bedrooms in Canton’s housing units is diverse. However, there is a slightly larger share of multiple bedroom units. Three-bedroom units make up nearly 4,000 of the existing units. Single bedroom and studio-style units typically appeal to younger singles and couples as an affordable option and it is slightly less present in the current housing stock. However, when looking at other communities, Canton is marginally supplying more single bed and studio units, but slightly trailing behind in 4- and 5-bedroom units.

Figure 18: Type of Housing Unit, City of Canton, GA

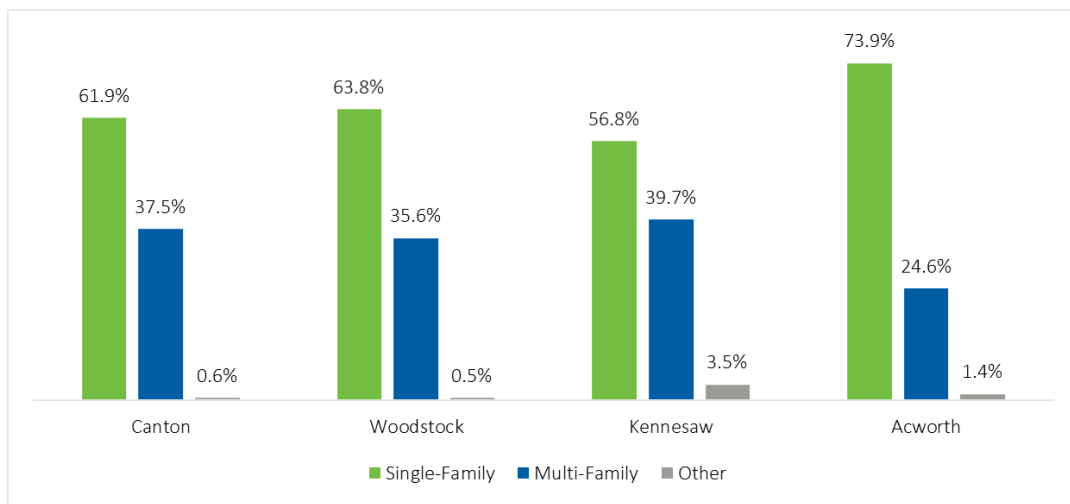


Figure 19: Type of Housing Unit, Comparative Communities, GA



Figure 20: Number of Bedrooms in Housing Unit, City of Canton, GA



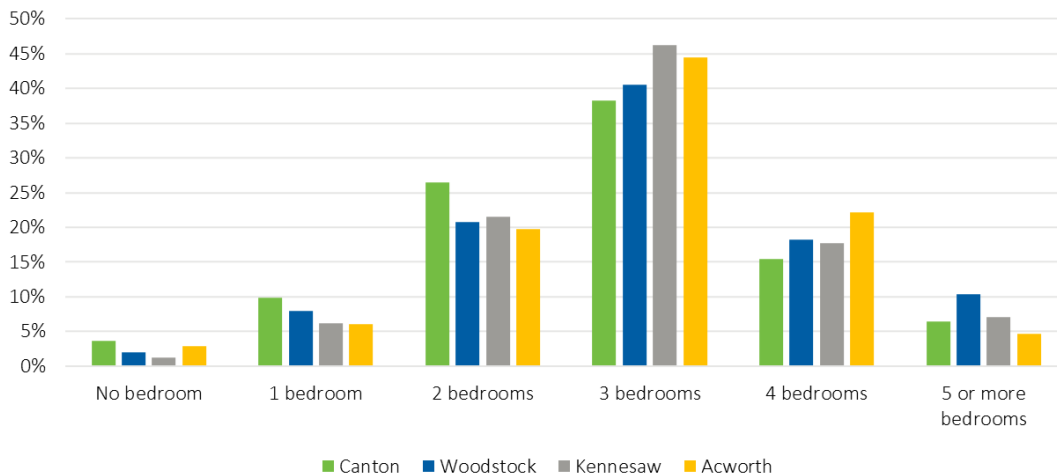


Figure 21: Number of Bedrooms in Housing Unit, Comparative Communities, GA

## MARKET ANALYSIS

The City of Canton housing market has gotten more competitive over the years as displayed by the average number of days a house stays on the market. Between January 2011 and January 2020, the average number of days decreased from 138 days to approximately 89 days, a decrease of nearly 36%. In 2018, estimates show some

months with average days on the market to be as low as 58 days. Overall, this is similar to peer communities. Some peer communities even show a smaller number of days on the market. This is indicative of the housing market becoming tighter and more competitive.

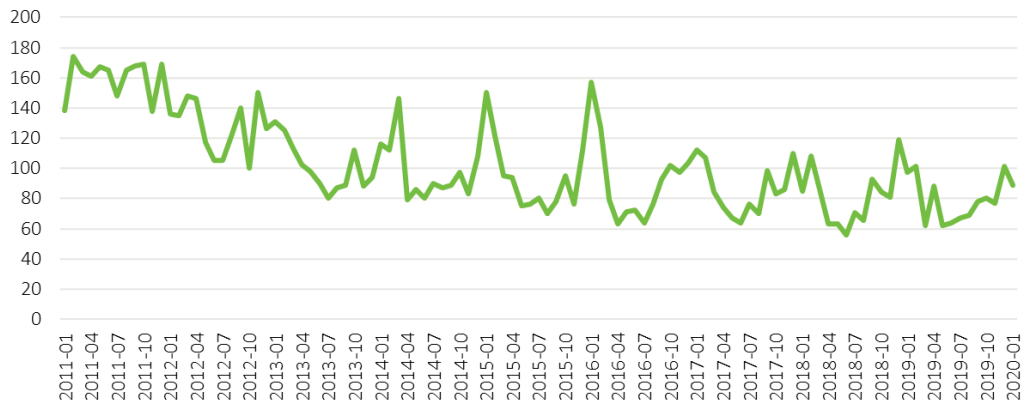


Figure 22: Days on Market, City of Canton, GA

Additionally, each year the number of permits for new builds has increased from under 300 single-family permits in 2016, to over 450 in 2019. This increase in single-family homes has also been accompanied by multi-family growth of both small and large multi-family developments. While the total number of permits decreased between 2018 and 2019, the total number of units currently proposed totals 2,700. Once completed,

this would represent a nearly 73% increase from the current 3,691 units in Canton proper. The current projected growth for Canton coupled with these trends shows promise for a well-functioning housing market over the next decade; provided that the City continues its trend of well-planned and balanced growth initiatives that have driven its recent success.

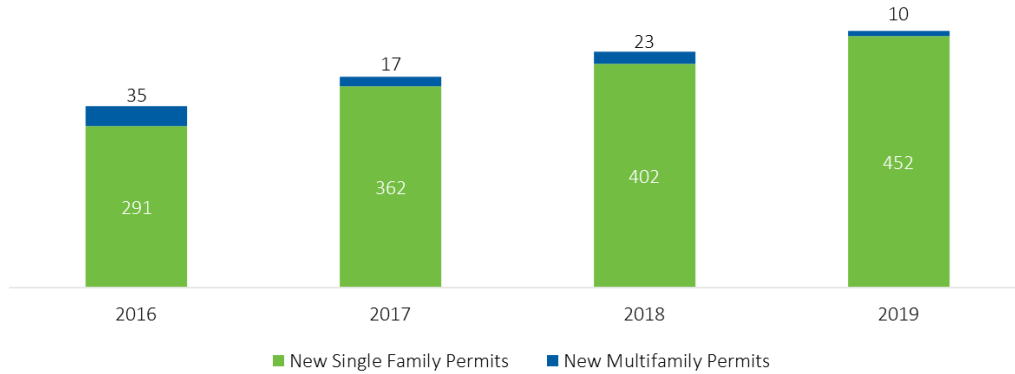


Figure 23: Single Family and Multifamily Building Permits, City of Canton, GA

In addition to tracking listings, Zillow estimates a rent index that reflects the fair market rate for all rental properties including single-family and multi-family properties for a given area. Because this measurement also includes single-family units in the market and relies on the mean as opposed to the median this number captures a different dynamic from the housing stock estimates provided in the American Community Survey (ACS). While the ACS shows a large share of low-price

rentals, the Zillow Rent Index (ZRI) in Canton has slowly increased over the past 10 years and has stayed moderately consistent over the past four years. This natural slow rise is indicative of a healthy market, and the stall could be from the introduction of lower price units or the natural aging of the existing stock. At present, this estimates that market-rate rent for a standard apartment unit would fall between \$1,400 and \$1,500 per month.

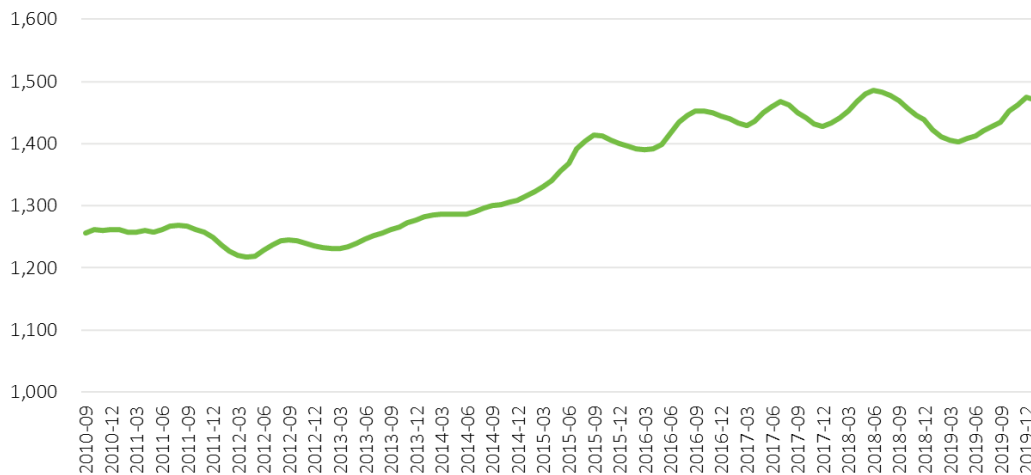


Figure 24: Zillow Rent Index Price Over Time, City of Canton, GA

The indexed home value in Canton has significantly rebounded after the subprime mortgage crisis of the late 2000s. Since then, the value has consistently been on the rise growing by over \$100,000 in the past ten years. As of late 2019, the home value index had reached over \$300,000, a steady climb from the low point of around \$190,000 in the years following the crisis. This value is reflective of the growth and competitive nature of Canton’s housing market within Cherokee County. Overall, the housing market is higher priced than the comparative communities by between \$50,000 and \$100,000. This is an average but indicates a higher price of homeownership in comparison to nearby areas.

The number of active listings each month gives another indicator of the overall volume of housing product on the market at any given time. In markets with extreme pressure created by excess demand and lagging supply, the number of listings would typically decrease over time. However, in Canton, the number of active for-sale inventory has steadily increased by a rough 20% between 2013 and 2019. This would indicate that while Canton has grown significantly, the market has also kept pace with population growth to provide a steady supply of for-sale homes during that time. It is important to note that during late 2019 and early 2020 there is a visible decrease in the number of listings which may be part of seasonal shifts in home sales, this does show that there is still active demand in Canton’s housing market. As the impact of COVID-19 continues to develop the number of homes for sale is likely to be a key indicator in the market’s response from both supply and demand sides.

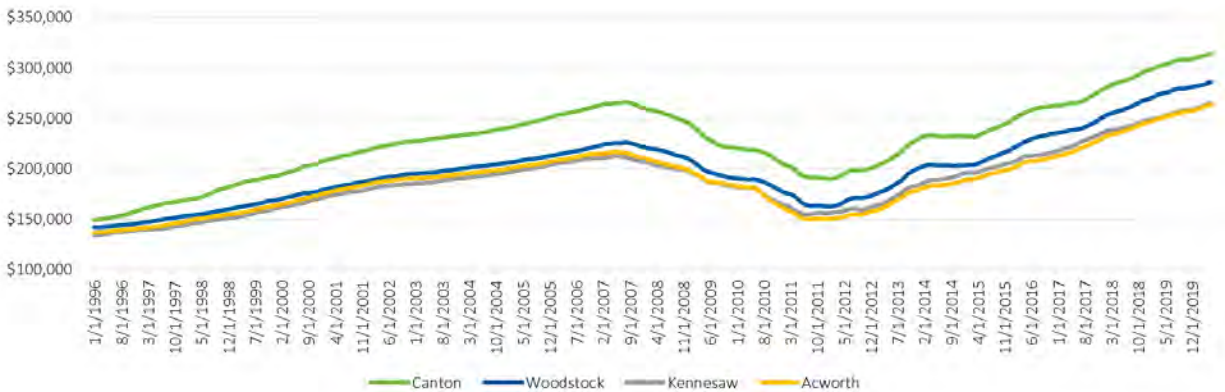


Figure 25: Zillow Home Value Index, Canton and Comparative Communities, GA



Figure 26: Monthly For Sale Inventory, City of Canton, GA



## PROJECTED DEMAND

A housing demand model for the City of Canton forecasts and quantifies what annual demand may be over a five- and ten-year period. The City of Canton Housing Demand Model reflects and ESRI business analyst data that includes 2010 US Census data and forecasts for population projections. Using this data, TPMA started the housing demand model for the estimated population through 2029. Once persons living in group quarters are removed from the estimate, then a population living in households can be estimated.

Housing unit occupancy rates remained consistent at around 99%. The projected number of vacant homes remained relatively stable at just under 1,300 units. Once vacant units are removed, the remaining difference is the new units built over a ten-year period. Units that would likely have been demolished or converted to other uses are removed from the new housing units total. This provides a net gain in housing units. Calculations are estimated based on household growth over the ten-year period.

Based on current estimates Canton will need an additional 1,518 units between 2019-2024 to

accommodate population growth. As Canton continues to grow an additional 1,672 units would be needed by 2029. Annually, this equates to 304 new housing units between 2019-2024, and 334 units between 2024-2029.

When determining the demand for future housing, the City of Canton must also consider the expected demand for units in surrounding areas. Based on current growth, it is expected that Cherokee County will need an additional 2,421 units annually between 2019-2024 and 2,658 between 2024-2029. In total, this would be an additional 25,397 units needed to accommodate population growth in the County, inclusive of the 3,190 units estimated for Canton. In cases where Canton succeeds in producing high-quality and suitable housing products some of growth can be absorbed by the City.

Given current rental and homeownership trends countywide, the bulk of new units would likely be for-sale housing options. In total, of the 25,397 estimated units, roughly 76.6% would be expected to be for-sale options. This can include smaller unit types, duplexes, or other single-family options depending on household size and location of the new development.

Demand for New Units	2010	2019	2024	2029
Total Based on Household Growth	4,466	2,723	1,287	1,433
Total new units Needed (Including units lost)	4,637	2,946	1,518	1,672
Annualized demand	464	368	304	334

Table 11: Total Projected Units for Canton, Rental vs. For-Sale

Demand for New Units	2010	2019	2024	2029
Total Based on Household Growth	26,250	16,419	10,093	11,058
Total new units Needed (Including units lost)	27,758	18,235	12,106	13,291
Annualized demand	2,776	2,279	2,421	2,658

Table 12: Projected Housing Demand for Cherokee County

Unit Type	2019-2024 Annual Total	2019-2024 5-Yr Total	2024-2029 Annual Total	2024-2029 5-Yr Total	2019-2029 Total
Own	1,855	9,274	2,036	10,181	19,454
Rent	567	2,833	622	3,110	5,943
<b>Total Units</b>	<b>2,421</b>	<b>12,106</b>	<b>2,658</b>	<b>13,291</b>	<b>25,397</b>

Table 13: Total Projected Units for Cherokee County, Rental vs. For-Sale



# STAKEHOLDER ENGAGEMENT

# STAKEHOLDER INTERVIEWS

TPMA spoke with over 30 stakeholders that understand Canton's current housing market and housing needs through interviews. Types of stakeholders engaged included bankers, real estate agents, builders, developers, business leaders, community leaders, and residents. Generally, stakeholder interviews supported findings of housing demand models and demographic and socioeconomic data analysis in terms of the existing a market and demand for new affordable housing. The project team engaged stakeholders on a variety of topics which included:

- 01** CONDITIONS OF THE HOUSING MARKET
- 02** CONSTRUCTION COSTS
- 03** SALES PRICE OF NEW AND EXISTING HOMES
- 04** CHALLENGES RELATED TO EXISTING HOUSING STOCK
- 05** CHALLENGES FOR NEW HOME CONSTRUCTION
- 06** BEST SITES FOR NEW HOME CONSTRUCTION
- 07** DIFFERENCES BETWEEN RENTAL- AND OWNER-OCCUPIED MARKETS
- 08** HOME BUYER PREFERENCES AND DEMOGRAPHICS
- 09** STRENGTHS, WEAKNESSES, OPPORTUNITIES, AND THREATS
- 10** GENERAL PERCEPTIONS OF CANTON AND DIRECTION THEY CITY IS HEADED





Stakeholders were generally in consensus that there is strong demand for new homes priced at less than \$200,000, though the supply of these types of homes is well short of what is in demand. A constant theme emerged that first-time home buyers are shut out of the market due to a lack of moderately priced homes. There is also a significant lack of affordable senior housing and amenities. However, stakeholders indicated there is ample market rate senior housing and apartments. Market rate apartments and rental units are often still too expensive and sometimes cost more than a mortgage payment for a moderately priced home. This impacts the business community, as entry level talent cannot reside in Canton without being cost burdened. Stakeholders noted in some cases when there are “affordable” options on the market, they are purchased by high earners and then become market rate rentals. This prevents those with

lower incomes from purchasing the affordable stock for ownership. Some stakeholders also noted that there is an immediate need for temporary and emergency housing in both Canton and Cherokee County to serve homeless populations especially homeless veterans and elderly residents that are severely cost burdened.

Stakeholders indicated that most housing development, including affordable development should seek to retain Canton’s “historic charm”. Stakeholders noted nearby communities that have done developments that are worth emulating such as developing high quality affordable housing. Stakeholders also noted that potentially incorporating walkability amenities and mixed-use space in Downtown Canton would be positive. Overall, it is acknowledged that Canton has experienced robust growth in population, income, and other





Possible locations for new workforce housing and preservation efforts include:

- » Riverstone Corridor
- » Canton Marketplace Corridor
- » Along Marietta Road  
(South of Downtown Canton)
- » Historic Housing  
(East of Main Street, downtown)
- » Old hospital site
- » Commercial spaces downtown  
(switch to mixed use)
- » Outer downtown, a  
(along the river, enhance walkability)
- » Mill Villages
- » Downtown Canton  
(property near the Justice Center and the Northside Apartments)
- » North Canton  
(the North end of Canton is generally more suitable for growth and development, as there is more land available)

economic characteristics, mostly for the better of the city. Most Stakeholders said they value Canton's cultural diversity and welcome positive changes brought by new development. Many stakeholders are concerned with exploitation of the Latinx residents living in unsuitable mill housing owned and rented out by landlords. These landlords were often referred to by stakeholders as "slumlords". Many of the rental mill houses need repair and rehab, but do not receive investment from landlords for needed upgrades. A vocal minority of the community has also had an impact on affordable residential development in Canton, often pushing back on workforce housing projects. Stakeholders agree this sentiment needs to be addressed through education and use of the phrase workforce housing due to the connotations of affordable housing.

There is increasing consensus among local officials to increase the flexibility of the housing options through more unique options such as ADUs or some variation of "tiny homes" that would offer quality lower price point units within Canton. There was also strong consensus to consider new types of residential development downtown especially along the East Main corridor. Stakeholders wish to see an increase in mixed-use development to bring affordability at various levels along with more retail to support other industries in downtown and throughout Canton.

Additional detail from stakeholder interviews based on stakeholder classifications including Local Government, Landlord/Developer, and Other Stakeholders (business owners, residents, etc.) follows.



## LOCAL GOVERNMENT

Stakeholders express a need and desire for mixed income developments. They would like housing that offers affordability at different levels. ADUs are a good tool to diversify housing stock because Canton needs “entry level” housing for recent grads, teachers, etc. that cannot afford more. There are a lot of mill housing close to downtown area, owned by a slim minority that acts as “slumlords”. The houses are incredibly old and in need of new infrastructure (preservation needed). Additionally,

Canton could use more subsidized housing. Without it, the local workforce has to live outside of Canton. At the county level there is significant need for less expensive workforce housing. The county apartment complexes are clustered in the southwest part of the county, close to the mobile home parks. Quality apartments are in short supply. Not much of the senior housing is affordable in Canton, but the old hospital site is potentially a big opportunity for housing.





There are multiple, possible locations for workforce Housing: the old hospital could be turned into single duplexes, triplexes, a village for low income seniors, or apartments near the new hospital. All this reiterates that Canton needs affordable housing (less than \$200k), a lot of people are renting. (rent is often the same as a mortgage payment). Emergency and temporary housing and housing shelter for the homeless are also in demand. Rome, Georgia is a good location to look at workforce

housing. The units are of high quality and the residents take care of them. They sit at about 1,700 SF/unit. Most of growth in Canton is on the northside for single family homes. North end of Canton is suitable for growth and more development, south end of Canton is not because of lack of space for construction. In the Sunnyside District, which is adjacent to downtown, there are many suitable locations for housing and other developments:



- » The Old Hospital Site  
(looking more for district-wide development rather than housing)
- » The Reinhardt College Parkway  
(Highway 5 up to Providence Nursing Facility - properties behind the Providence Center)
- » Teasley Middle School
- » The area behind Holly Street  
(near City Hall)
- » Railroad Street  
(The homes need to be upgraded and remodeled. They are rental properties.)
- » Duplexes near the old City Hall  
(might be worth consideration)
- » Senior development unit near River Song  
(behind Piedmont hospital facilities, land behind Prominent Pointe - Highway 140)
- » Property off The Bluffs (county admin offices)  
(Housing development is going in there. That area is within the city limits. It is a potential multi-use development. The only thing that is in there at this point is commercial – no residential use at this time.)
- » Site in front of River Green  
(good for mixed use and could be along Toll Road 575)
- » Commercial spaces downtown  
(The Lawyer offices are occupied for the most part. There could be potential to move property to mixed use as there is a need for multiple restaurants.)



#### LANDLORD/DEVELOPER

There are two major areas of need: more people living downtown that patronize local business and housing for low income people. There has been a significant amount of upscale housing and apartments that are not affordable. These have pushed needed workforce out of the Canton housing market.

Seniors and, mixed income families are looking for housing, but the cost of living has increased seniors and residents with lower incomes. Mixed income development is important and Canton lacks affordable senior housing to make that possible. This lack of affordable housing puts continued growth at risk and limits available land that is not in a flood zone or used commercially. There may be opportunities to use older commercial areas for residential. Many apartments in the area, but none of them are affordable. The treatment plant is almost at capacity in the area, signaling that Canton is growing and needs access to better, more affordable housing.

A big opportunity would be to use the Etowah river for development. The City could sell the old shopping center, and other developmental places for condos next to the Etowah River Park. This site could open a market to older residents who do not want maintenance. This spot would also be walkable for younger people and families.

Downtown housing is limited, especially the East Main corridor. Limited housing available is targeted

at appropriate housing point. Most housing would need extensive rehab. There are some rental pockets, downtown but they need work. Smaller complexes would be welcomed, but downtown would be tricky. To build downtown, other housing would need to be remove to build something new. The characteristics of Downtown reflect early 1900s mill time. This area has been used by landlords who have taken advantage of Latinos and non-English speaking residents.

Possible location of townhome and duplex development could fit at the Teasley Middle School site.

For mixed or commercial use right across from Academy Street on City Hall, the goal was to have retail on the first floor of the apartments. This style would be good for downtown, and this has also been talked about for the old elementary school, although no formal development has materialized thus far.

Riverstone corridor has some townhomes and there is more space for more, but it does need improvements for walkability. Other possible options include Canton Marketplace corridor and Marietta Road corridor. Downtown Canton is a historic district development that needs to be maintained for its historic feel. It has good external preservation, and it promotes walkability. There are areas in the district that need to be cleared as they are not salvageable from a square foot perspective. In the area east of Main Street, the historic houses need preservation.





## OTHER STAKEHOLDERS

Housing is a top topic of conversation, with the discussion mostly revolving around the lack of affordable housing options. Business owners have trouble because their employees cannot afford to live in area, greatly limiting their hiring options. Driving affordability issues is that the City has tended to not want apartment complexes and only approves more “high end” development. This keeps out low income residents and minorities as the prices ultimately drive out lower income residents. The Rental stock is mostly owned by slumlords as they purchase the “Affordable” houses and rent them out.

The city is growing but the housing is not aligned with people’s needs because Canton is lacking middle priced houses. The demand for mixed income housing is present, but Canton has a significant amount of homes priced over \$200k. In the area, there is no housing for low income seniors, and it is very difficult for them to age in place if they are not wealthy. The cost of homes is putting immense pressure on low income seniors and leaving some to pick between paying rent and buying medicine. Besides seniors, there are lots of veterans on fixed income need housing. Low-income families are also moving in together to afford Canton’s rent.

Canton is missing the opportunity that will retain young people. Currently, not many want to stay. It is difficult to afford housing if they wanted to stay in Canton. Canton needs to continue to speak to the diversity in the area. If

more people knew about the area and if it was affordable, it may attract new residents. Townhouses would be good for workforce housing. A few areas that would be possible for development include:

- **The Old Hospital**  
(good site for new housing, but development needs to make it walkable)
- **Downtown Housing**  
(There are old, historical homes that are nice but could be improved for younger residents. Much more could be offered downtown with development.)

Rental houses could be a good answer in this case, maybe not apartments but other sorts of rental living applications:

- **Cherokee Street**  
(This is a good place for development. It is only ½ mile from the city center and is in a residential area.)
- **Mill Villages**
- **Behind City Hall**  
(homes that could use preservation)
- **Marietta Road**  
(heading the opposite direction of Downtown Canton could be a good location but need to develop its walkability)







### KEY TAKEAWAYS OF INTERVIEW FINDINGS

Key takeaways compiled by TPMA after completing stakeholder interviews is included below. Takeaway build on the findings identified above from local government, landlord/developer, and other stakeholder groups. Findings have green, yellow, or red points associated with them to signify the finding is positive, negative, or neutral. These points could shift depending on local response. Summary findings for all stakeholder groups include:

- Significant desire for mixed-income and mixed-use development from most stakeholders
- Serious lack of affordable senior housing
- Ample market rate apartments, although mostly too expensive for young people and workforce
- Overall a growing city with a diverse population
- Canton has and must maintain its “historic charm”
- Challenges with landlords of downtown mill houses and potential for future gentrification
- Attractive sites downtown and along with the outskirts of the city
- Education needs to happen on the benefits of affordable housing - unfounded and based on biases and the illogical stigma associated with lower income housing
- Based on findings from data analysis, stakeholder interviews, and an on-site tour, TPMA with the guidance of local leadership was able to identify several sites within the city positioned for housing development.

### TPMA’S DEFINITION OF WORKFORCE HOUSING (WF):

Sufficient workforce housing stock is important for the economic vibrancy of a community. Accordingly, it is necessary to understand what workforce housing is. Essentially this kind of housing is priced in the \$150,000-200,000 range and able to be purchased by the “service” workforce of the community – firefighters, teachers, nurses, and others who have been continuously priced out of the higher market rate housing options. This term can refer to any form of housing, including ownership of single-family or multi-family homes, as well as occupation of rental units. Generally, WF housing is understood to cater to those who lack enough earned income to live near their place of work. Further, WF housing does not necessarily include subsidized options.





# CASE STUDIES



## HISTORICAL HOUSING PRESERVATION CASE STUDIES

Historical housing preservation is the continued rehabilitation of older homes, businesses, and institutions into new, affordable housing. Affordable housing rehabilitation can contribute to restoring vitality to historic neighborhoods and is an important strategy for historic preservation. Federal tax incentives provide ample opportunities for affordable housing and historic preservation to work together, including implementing Low-Income Housing Tax Credit (LIHTC) and Historic Rehabilitation Tax Credit for the benefit of the community.





Baltimore Heritage from Baltimore, MD, USA, CC0, via Wikimedia Commons

### **OLIVER NEIGHBORHOOD, BALTIMORE, MD:**

Since 2006, the community organization Baltimoreans United in Leadership Development (BUILD) has partnered with the community development financial institution the Reinvestment Fund (TRF) to revitalize Oliver Neighborhood, an east Baltimore neighborhood where disenfranchisement and crime have created a distressed housing market. TRF's Development Partners have added nearly 200 residences to Oliver's housing stock through rehabilitation of vacant rowhouses to maximize neighborhood impact.

TRF used limited public expenditures to rehabilitate blighted houses standing among houses in good condition. In doing so, they inserted new neighbors without uprooting old occupants, piecing together the

neighborhood one block at a time. TRF further fortified the community by creating jobs for local businesses by hiring people from the neighborhood for construction. As a result, local firms have won over 70% of TRF's construction contracts.

Between 2009 and 2016, TRF rehabilitated 188 residential units in Oliver. TRF demonstrated how historic tax credits can be used to produce high-quality, affordable housing. TRF indicated how historic tax credits can produce scattered site rehabilitation and affordable housing that strengthens the neighborhood and improves the housing market. Vacant properties in Oliver have been reduced from 481 in 2009 to just 30 in 2016, while the median home price has increased from \$18,450 in 2008 to \$135,000 in 2016.



### RIVERSIDE PLAZA, MINNEAPOLIS, MN:

Part of HUD's New Communities Program in the 1960s and 1970s and capturing the neighborhood of Cedar Square West's "New Town-In Town" development, Riverside Plaza was completed in 1974. The building's historical significance rested on its status as the first and larger of only two remaining New Towns-In Town projects and is architecturally significant. The neighborhood of Cedar-Riverside was settled by German and Scandinavian immigrants in the mid-nineteenth century. Today, the building remains a haven for immigrants who are now predominantly from East Africa and East Asia.

By 2010, Riverside Plaza was in desperate need of renovation. The Minnesota Historic Structure Rehabilitation Tax Credit opened a potential source of funding for these extensive renovations. The Plaza became eligible for historic tax credit when it was listed on the National Register of Historic Places in December 2010. This honor filled in potential financing gaps to make the major renovations possible.

The nearly \$134 million project was financed by both 4% LIHTC equity, federal and state historic tax credits to about \$57 million between the three sources. The renovation replaced the aging electrical and mechanical systems, while pipes, heating, ventilation, and the air conditioning network were all replaced in 1,303 units. The new heating and cooling systems, refurbished windows, and new patio doors are expected to reduce energy consumption by up to 25%. About 90% of the units are affordable with 669 Section 8 and 505 additional units affordable for households earning less than the area median income.

The Riverside Plaza Rehabilitation Project preserved the plaza as a Minneapolis icon as an important neighborhood for generations of immigrants. The project has also contributed to broader revitalization efforts in the Cedar-Riverside neighborhood with new light rail service, street improvements, and other housing developments.



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### MINVILLA MANOR, KNOXVILLE, TN:

Minvilla Manor was converted from the previous Fifth Avenue Motel that was condemned by the city in 2002. The building was identified as a site for Knoxville and Knox County's Ten-Year Plan to End Chronic Homelessness and serves as a symbol of the transformative power that "housing first" strategies can have on chronically homeless persons. The Volunteer Ministry Center (VMC) of Knoxville was the lead organization in the development of the new supportive housing units.

The Manor was awarded \$7 million to be transformed into 57 units with housing and supportive services. Both Low-Income Housing Tax Credits and historic tax credits were used for the renovation and made up \$3.4 million of the funding. One of the major challenges of the project was restoring the original façade of the building. In some instances, the original tongue and groove wood floors were replaced while an entire porch roof had to

be rebuilt. The interior of the building was renovated to include a computer and community gathering room and a kitchen. A critical point of the rehabilitation was the unification of the buildings into a single, connected facility. A corridor was built to connect the two structures. This new corridor was built to match the aesthetic qualities of the historic brick façade.

Since built in 2010, Minvilla Manor has a resident retention rate of 92%. This retention rate is similar to other housing first programs, showing the evidence that housing has on the stability of life. The structure of Minvilla also promotes energy efficiency with its reuse of existing structures and Energy Star certification in all 57 units. The energy cost savings help manage the facility's operating costs and help it devote more resources to supportive services. The quality of the Minvilla Manor rehabilitation earned the project the 2011 National Trust/HUD Secretary's Award for Excellence in Historic Preservation.





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### HAHNE & CO BUILDING, NEWARK, NJ:

The Hahne & Co. building built in 1901, which stood vacant for 30 years has now been transformed into 160 studio, one-, two- and three-bedroom units, including 64 affordable units, retail space, and an art and cultural space operated by Rutgers University. Residents also have access to an onsite fitness center and billiards lounge. 54 units are available to households earning up to 60% area median income and 10 units are available for those earning up to 40% of the median income. The renovation of the Hahne & Co. building, which is listed on the National Register of Historic Places, highlights the structure's historic significance. The 200-foot-long skylight was restored and used to create a 2-floor atrium called the Grant Court. The department store's limestone façade, signage, and windows were also restored.



The public-private partnership was financed with LIHTCs and historical tax credits that accounted for 20% of the cost of the \$175.5 million project. The use of the historic tax credits required development of the renovation to maintain, repair, and use the Hahne & Co. building's original elements to preserve its historic significance. An additional \$62.2 million came out of federal and state tax credit programs as well.



The Hahne & Co. building helps correct the imbalance of residential and commercial use in downtown Newark, which had been lacking. The new commercial uses make additional residential development more attractive to developers. The presence of Rutgers University's Department of Arts, Culture, and Media in Newark helps the university connect to the city and expands the downtown's cultural resources.



# HOUSING REHABILITATION CASE STUDY EXAMPLES

Housing rehabilitation programs provide funding to repair, improve, and modernize housing units. These programs primarily serve low- and median-income families. These programs have strong evidence for health benefits, increasing the unit's energy efficiency, and can decrease disparities for low-income families.

## ALEXANDRIA, VA:

Located in a historic district in Alexandria, these units manage to double the original density of the building with a combination of taller multifamily buildings and four-story rowhouses. The redevelopment of Old Town Commons into new, mixed-income, modern communities allows families to have a short walk to many recreational and cultural amenities in Old Town Alexandria.

The sole financing of the redevelopment was the proceeds of the sale of the land under the market-rate units, the contribution of the land under the

affordable units, and equity raised from 9% LIHTCs. This arrangement provided the funds to construct the affordable units and allow families earning 40 to 50% of the area median income to call Old Town Commons their home.

An impressive aspect of this project is the complete replacement of 194 public units to achieve a full one-to-one of the same number of units and bedrooms. This project was a finalist for the 2014 Jack Kepp Excellence in Affordable & Workforce Housing Award, showcasing that it is a laudable public-private partnership that has transformed an under-performing neighborhood into a pedestrian-friendly, mixed-income and transit-oriented community.



**SHERWOOD VILLAGE, SALINAS, CA:**

Renovated from three derelict motel buildings, the Sherwood Village Senior Apartments is a 124-unit affordable housing project that is an adaptive, environmentally friendly addition to the community. The adaptive reuse of these motel buildings won the 2011 HUD Secretary's Opportunity and Empowerment Award. The average media income in Salinas is about \$6,700 less than the rest of Monterey County. Median household income for those over 65 years-old is less than \$32,000 with nearly 60% of the seniors who rent in Salinas meeting the standards for housing cost burden. The site for the rehabilitation was attractive because it would cost 25% less than new construction. \$15.9 million in financing came from LIHTCs awarded by the California Tax Credit Allocation Committee. Once initial financing was secured, the rehabilitation of the motel buildings could begin. The major challenge for architects was transforming former motel rooms into homes and redesigning the space to attract permanent residential living, not wandering travelers.

Sherwood Village includes many "first" as it serves as an exemplary model for affordable, sustainable housing development. 75% of construction debris was recycled while the motel furniture was donated to charity. The remodel features sustainable design including resource conservation such as an onsite rain garden that filters the rainwater collected before being stored in the local watershed. Sherwood Villages also includes solar panels that generate approximately 105,000 kilowatts of energy annually. This amounts to roughly \$23,000 in annual savings. Energy star appliance installed in each apartment reduce electricity consumption by residents and a 98% efficient central gas furnace ensures conservation of the space and hot water heating.

Sherwood Villages has allowed residents to return to Salinas who were once priced out of the city. The waiting list included more than 100 could-be residents, emphasizing the innovating success of the project.

**PROSPECT VILLAGE, OMAHA, NE**

Omaha chose the Prospect Village Neighborhood as a site for its Housing and Community Development Division in 2014 because of its high level of distress. The two-year initiative focused on three issues: housing and blight mitigation, neighborhood amenities, and community activities and empowerment.

The Prospect Village Neighborhood Revitalization Initiative (PVNRI) worked on housing construction, rehabilitation, and repair. In 2015, PVNRI built 30 houses for rent for families under 60% of the area median income with an option to buy after 15 years. 36 houses occupied by owners making no more than 80% of area median income had rehabilitation or reconstruction done. 19 emergency repairs were also performed for households making no more than 50% of area median income. The work done included repairing heating systems, water heaters, and electrical and plumbing systems.

Many organizations involved with PVNRI continue their revitalization efforts in the neighborhood today. In 2016, the city was recognized with an Agency Award of Merit from the National Association of Housing and Redevelopment Officials. The city of Omaha has plans to target other neighborhoods with the same initiative and effort seen in Prospect Village.



## HOUSING FUND EXAMPLES

Housing trust funds are established as sources of funding for affordable housing construction. Housing funds receive ongoing revenues from dedicated sources and are not dependent on annual appropriations. Funds received are designated to support affordable housing over other community needs. Housing funds include sources of funding in addition to other funds restricted or available to support housing.

### GREENVILLE, SC:

The Greenville Housing Fund's vision and mission is centered on a thriving neighborhood with affordable and safe housing. Their goals include investing in affordable housing development and championing the use of affordable housing in Greenville. Their role is to help finance and invest in housing development for Greenville residents earning \$55,000 and below. In doing so, they leverage public and private funding to finance the preservation and production of affordable housing. The Housing Fund also convenes stakeholders to address housing issues and build support for development in the community for affordable housing.

On September 17, 2018, Greenville's Housing Fund announced \$800,000 in initial funding for three projects: a Habitat for Humanity Development, Preserve at Logan Park, and Stratham Development that will support development of 113 new, affordable units. They are also launching a new Homeowner Preservation Program (HOPP) which will work with local nonprofit partners to rehabilitate and preserve existing homes in communities experiencing strong gentrification.

Greenville's Housing Strategic Plan for 2020-2030 is to preserve 3,000 homes and create 10,000 more affordable units throughout the city and county. This plan uses proven strategies to effectively address the shortage of affordable housing and increase the number of units over the next decade.





### CHARLOTTE, NC:

Founded in 2001, the Charlotte Trust Fund was created to finance affordable housing. Since its start, the housing fund has financed 9,118 new and rehabilitated affordable housing units. 4,029 of these new houses were for households earning less than 30% of the area median income. The City has committed \$177 million to the Housing Trust Fund.

Charlotte has set a benchmark to create 24,000 new, affordable units to meet its growing population's needs by 2030. This means that more than 55,000 Charlotteans do not have a place to live at the moment.

To meet these needs, the Charlotte Trust Fund has devised three strategies. The first is to increase rental production by using development of 4% and 9% LIHTC projects that will incentivize affordable housing development. Secondly, they will support mixed-income development, which means establishing a neighborhood revitalization strategy area and increase resources flexibility. Finally, the Fund will leverage land to support affordable housing developments.

### SAVANNAH, GA:

The Savannah Housing Fund was established in 2012 to serve as a finance tool for maximum local control and to attract investors, fund construction and rehabilitate housing. Financing from the housing funds makes it possible for banks to finance home builders and mortgage companies to finance first time home buyers. The Fund has support from the Savannah Economic Development Authority, the Savannah Area Chamber of Commerce and other business and community leaders. Its leverage of private investment helps fund many affordable housing projects.

The City of Savannah has invested \$1.6 million in the Housing fund through 2019, with \$400,000 coming from local banks, businesses, and nonprofits. The Housing Fund has leveraged these investments and loans to help build a total of \$13.1 million for affordable housing.



## LAND BANK EXAMPLES

A land bank is a governmental or nongovernment nonprofit entity established to assemble, temporarily manage, and dispose of vacant lands for the purpose of stabilizing neighborhoods and encouraging re-use and redevelopment of urban property. Each land bank operates in a specific, defined geographic area such as a city and county.



### ROME, GA:

The Rome-Floyd County Land Bank Authority is a public entity created on February 28, 2017. The Land Bank was established to acquire delinquent or surplus properties for the local government to foster repurposing the land to a nonrevenue-generating, nontaxing producing state. This is done to provide affordable housing and new industry for the city of Rome and Floyd County.

The Rome-Floyd County Land Bank Authority is comprised of five members, two appointed by the City, two appointed by the County and one at large member appointed jointly. Members serve a four-year term.

The Land Authority had its first nine sales in early September 2017 as it finally can use the 75% of tax revenue for five years after the sale from these properties to generate redevelopment of more properties and raise awareness for the community.

### COLUMBUS, GA:

Established in 1992, the Land Bank Authority of Columbus was among the first land banks in the country. Its mission is to collect vacant, delinquent, and government surplus properties and to restore them to their full potential. To generate tax revenue and create affordable housing and innovative spaces for as gardens, parks, and small businesses.

The Land Bank Authority is governed by a board of 7 volunteer members appointed by Council. The Board welcomes the public to their open meetings on Thursdays at 10:00 AM.

In 2019, the Land Bank impacted 19 properties with 9 of them being turned into affordable homes for the region. One property had been tax delinquent for 25 years. The Land Bank ended \$150,000 in taxes and returned that value into 19 properties valued at \$400,000.

Getting awareness that the Land Bank exists and its function to the Columbus community is a main goal of the Land Bank Authority. The objective for the Authority was to educate and explore the question, "Why is it so hard to deal with problem properties?"





### MACON, GA:

The Macon-Bibb County Land Bank Authority was established in 1996 as the second land bank in Georgia. The Land Authority works collaboratively with Macon-Bibb County for the implementation of community and economic development.

Its mission is to create vibrant communities through elimination of blighted properties, creation of affordable housing and enhancing economic activities. The Land Bank is a strategic tool that supports growth and investment in the neighborhoods of Macon.

The Authority has one full-time staff member, Everett Verner who serves as Executive Director. He assists with planning, acquisition, and disposition of properties in accordance with the mission of the Land Bank Authority. He negotiates and facilitates property donations, rem tax foreclosures, and the strategic acquisition of properties.

### VALDOSTA, GA:

Founded in 1999, the mission of the Valdosta-Lowndes County Land Bank Authority is to convert vacant, abandoned, and tax delinquent properties into productive use to create and promote affordable housing. The purpose of the Land Bank is to foster public awareness of returning property to generate non-taxing producing status to provide new industry and jobs to Lowndes County citizens.

The Land Bank's first challenge in 1999 was the redevelopment of Fellowship Place. The Land Authority partnered with Habitat for Humanity to develop the affordable housing and to locate twelve first-time home buyers. By 2002, the former blighted property was now filled with twelve beautiful, new, affordable units. Almost two decades later and Fellowship Place is still a flourishing subdivision.

The Land Bank is comprised of seven members, three appointed by the City, three appointed by the County, and one at large member agreed upon jointly.

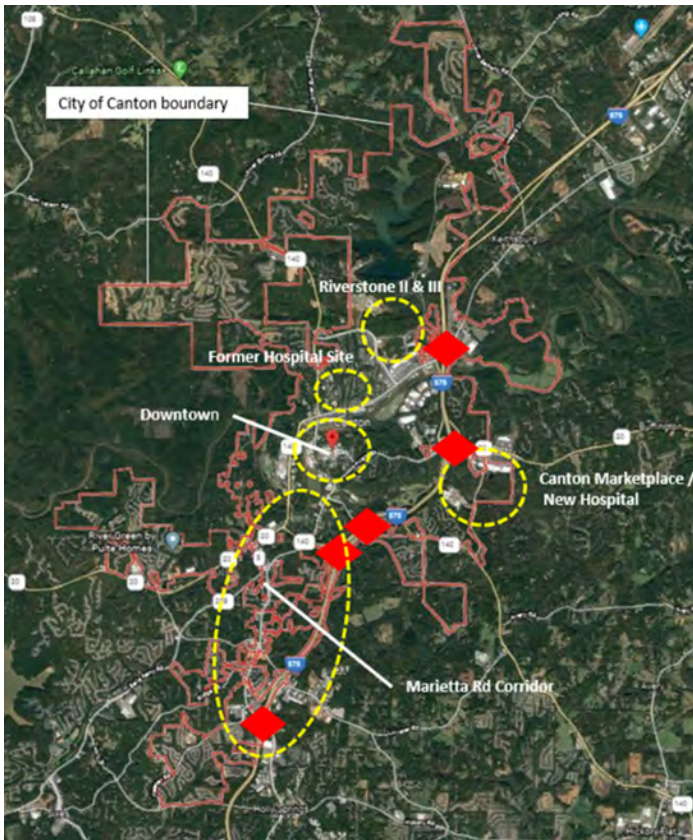




# DEVELOPMENT SITES

## KEY LOCATIONS

Five key locations for future housing development in Canton were identified through this study. These locations include:



The following section will describe these areas in more context including specific sites located in each. Site descriptions provide context of properties within each site, potential project phasing, appropriate housing types, price point, and associated housing tapestry profiles that new housing development could appeal to.

**01 THE MARIETTA ROAD CORRIDOR**

**02 CANTON MARKET PLACE / NORTHSIDE HOSPITAL AREA**

**03 FORMER NORTHSIDE HOSPITAL SITE**

**04 RIVERSTONE AREA**

**05 DOWNTOWN CANTON**



## THE MARIETTA ROAD CORRIDOR

Four sites for new housing development were identified within the Marietta Road Corridor area. These sites include:

**01** PROMINENCE POINT  
PARKWAY

**02** THE SUNNYSIDE  
NEIGHBORHOOD

**03** CANTON VILLAGE  
SHOPPING CENTER

**04** CANTON CORNERS  
SHOPPING CENTER

These sites could support a variety of multifamily development opportunities such ranging from apartments to townhomes. The corridor offers existing amenities and infrastructure that would complement new residential development. Development along the corridor could promote regional connectivity and access to Atlanta. Based on findings from data analysis and stakeholder interviews, there is strong demand for denser multi-family development that could be affordable for young families or workforce such as nurses, teachers, and first responders. There is also demand for more affordable senior housing. The sites along the Marietta Road Corridor could support all of these housing types at the four specified locations.



### PROMINENCE POINT PARKWAY

The Prominence Point Parkway development area is southwest of the Prominence Point shopping center. Currently, senior apartments are planned for a portion of this development area. There is an opportunity to compliment this planned senior project with development of market rate apartments and townhomes. Qualitative data based on conversations with local developer, community leaders, and residents suggest there is a strong market in canton for quality townhomes. This type of development at the Prominence Point Parkway development area could potentially be priced between \$200,000 and \$250,000.

This project could incorporate development of townhomes, apartments, and senior housing in multiple phases. Senior development is planned for the northwestern portion and is likely to be the first phase of development. Townhomes could be completed as a second phase within the middle portion of this site and would be tucked between senior development and the Prominence Point shopping center. The final phase of development could be apartments in the south/south eastern portion of the site directly along Prominence Point Pkwy. All three phases of these developments would promote connectivity to the adjacent shopping center creating a multi-use center along the Marietta Road Corridor. This development would also compliment and align with existing residential units south of Prominence Point Parkway. In total, 120-150 total units could be developed between townhomes and market rate apartments.

Development of apartments and townhomes within the Prominence Parkway Development Area could appeal to the following consumer tapestry segments (for more information on the following tapestry segments see Appendix A):

- » **Metro Renters** - Typically younger, highly mobile residents who live close to their job with most of their income going to rent, clothes, and the latest technology.
- » **Young and Restless** - Educated, young workers employed in professional or technical occupations looking to make big strides in improving themselves.
- » **Bright Young Professionals** - Located in urban outskirts of large metro areas, this tapestry is young, educated, and working professionals who are generally white-collar and are physically active residents.
- » **NeWest Residents** – Young and new to career Hispanic residents who are still getting their roots.
- » **Emerald City** - Young, well-educated residents of lower-density neighborhoods in urban areas, these communities make close to the US median income and balance long hours on the internet with time in the gym.
- » **Metro Fusion** - Hard-working, young, diverse market of residents who may not speak English fluently, but are dedicated to climbing the ladder in their professional and social lives.
- » **Old and Newcomers** - Primarily in neighborhoods in transition, this tapestry is populated by renters either beginning their careers or retiring.
- » **City Commons** - Comprised of young, single-parent and single-person households living within large, metro areas with a third having a college degree.
- » **Front Porches** – Young families that are still starting out and tend to live in older homes, duplexes, or townhomes.
- » **Hardscrabble Road** - More established families and single parents in urban cores, typically in older homes.
- » **Up and Coming Families** – Younger and more mobile residents just starting their family and they are one of the fastest-growing markets in America.
- » **Middleburg** – Semirural subdivision residents. Typically, conservative, and family-oriented consumers.

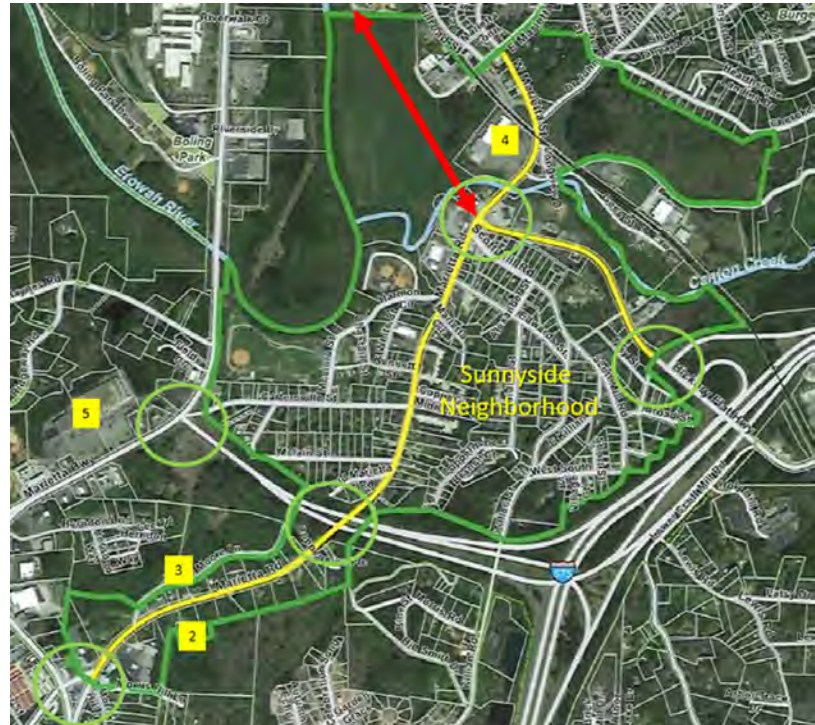


## THE SUNNYSIDE NEIGHBORHOOD [SAME AS #1, #4, #5]

The Sunnyside Neighborhood is located between the southern portion of Downtown Canton and northeast of the Highway-140 and I-575 interchange. This neighborhood has significant potential due to proximity to downtown Canton and Boiling park, though it has older homes that could be incorporated into a residential rehabilitation program. In addition to residential rehabilitation in the core of the neighborhood, there is opportunities to re-in force the neighborhoods outer edges with development of new market rate apartments. Two steps are critical to new development and redevelopment on at this site. The City of Canton may work with local partners such as the Canton Housing Authority or other non-profit developers to promote housing rehabilitation programs for the Sunny Side neighborhood's core. Objectives of this program would be to provide funding for residential repairs, improvements, and modernization of existing units to benefit the neighborhoods current residents without promoting gentrification. If this program is successful, areas surrounding the Sunnyside neighborhood could be more attractive for new development such as apartment complexes.

Development of apartments and redevelopment of single-family homes in the Sunnyside Neighborhood area could appeal to the following consumer tapestry segments (for more information on the following tapestry segments see Appendix A):

- » **Up and Coming Families** – Younger and more mobile residents just starting their family and they are one of the fastest-growing markets in America.
- » **Front Porches** – Young families that are still starting out and tend to live in older homes, duplexes, or townhomes.
- » **Hardscrabble Road** – More established families and single parents in urban cores, typically in older homes.



The figure above demonstrates areas on the outer edges of the Sunnyside neighborhood that could support new apartment complex development. These are marked sites 2, 3, and 4. These three locations could promote a total of 580 new apartment units and each site could include complexes with 140-160 units. These apartments complexes could be mixed income and include both market rate and affordable (workforce) units. This would align with the existing conditions in and around the Sunnyside neighborhood and could cater to a diverse range of residents with a variety of income levels. In addition to the neighborhood revitalization program, a second possible step to promote development in this area may be an overlay district. This would help focus and define the types of development that would be acceptable by the city's standard in this area and ensure new projects include mixed income development to address some of the local affordability challenges.

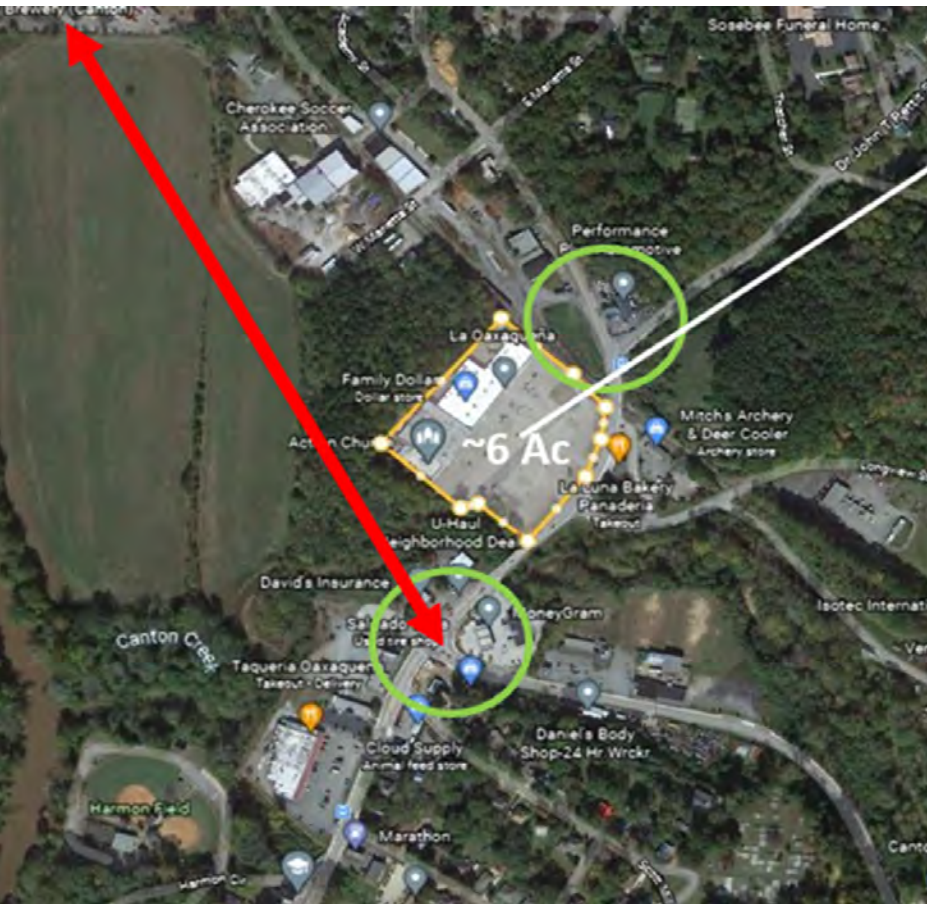


### CANTON VILLAGE SHOPPING CENTER

Canton Village Shopping Center is known as Canton's original shopping and has been a longtime commercial area in the city. Overtime, the shopping center has aged, and newer commercial areas have captured significant portions of the local retail market. For these reasons, the site could be positioned for redevelopment that shifts the property toward residential uses. The site is large enough to accommodate 140-160 new affordable multi-family residential units. The site could still maintain some commercial functionality by incorporating 10,000 SF of commercial space into the new development.

This project would require removing the outdated and blighted shopping center to be replaced by a new mixed-use development that is mostly residential with a limited amount of commercial space. The site is about 6-acres, and it could support a building footprint of about 50,000 SF. If the development were three-stories, then it would

support about 126,000 SF for residential and 10,000 SF for commercial retail uses. This translates to about 142 apartment units. The project supports use of 4% Low-Income Housing Tax Credits for about 20% of the units or 28 units at about \$1.05/SF or \$840/month. This leaves about 113 units for market rate rents at about \$1.50/SF or \$1200/month. Commercial rents are kept attractive at an estimated \$10/SF as the retail and other commercial uses are designed to serve the project and surrounding residents and employees.



This project would support a blend of income levels affordable and market rate rentals and future road connectivity to Mill destination center (RED arrow) strengthens overall redevelopment of the area. Additional redevelopment around the shopping center site should be studied to understand how best to redevelop the area in entirety. Again, this could require need for overlay district.

The Canton Village Shopping Center Redevelopment could be attractive to the following market tapestries (for more information on the following tapestry segments see Appendix A):

- » **Metro Renters** - Typically younger, highly mobile residents who live close to their job with most of their income going to rent, clothes, and the latest technology.
- » **Young and Restless** - Educated, young workers employed in professional or technical occupations looking to make big strides in improving themselves.
- » **Bright Young Professionals** - Located in urban outskirts of large metro areas, this tapestry is young, educated, and working professionals who are generally white-collar and are physically active residents.
- » **NeWest Residents** – Young and new to career Hispanic residents who are still getting their roots.
- » **Emerald City** - Young, well-educated residents of lower-density neighborhoods in urban areas, these communities make close to the US median income and balance long hours on the internet with time in the gym.
- » **Metro Fusion** - Hard-working, young, diverse market of residents who may not speak English fluently, but are dedicated to climbing the ladder in their professional and social lives.
- » **Old and Newcomers** - Primarily in neighborhoods in transition, this tapestry is populated by renters either beginning their careers or retiring.
- » **City Commons** - Comprised of young, single-parent and single-person households living within large, metro areas with a third having a college degree.
- » **Front Porches** – Young families that are still starting out and tend to live in older homes, duplexes, or townhomes.
- » **Hardscrabble Road** - More established families and single parents in urban cores, typically in older homes.
- » **Up and Coming Families** – Younger and more mobile residents just starting their family and they are one of the fastest-growing markets in America.



### CANTON CORNERS SHOPPING CENTER

The Canton Corners Shopping Center is positioned similarly to the Canton Village Shopping Center as it has seen decreased commercial activity but could be redeveloped for residential purposes to support a higher and better use. Potential projects could include a blend of market rate and workforce affordable housing with some commercial to maintain some of the sites former character as a retail center. Overall, the site is an excellent redevelopment project with catalytic project potential.

This project would require removing the outdated and blighted shopping center to be replaced by a new mixed-use development that is mostly residential with a limited amount of commercial space. The site is about 13-acres, and it could support a building of about 300,000 SF. If the development were three-stories, then it would support about 260,000 SF for residential and 15,000 SF

for commercial retails uses. This translates to about 324 apartment units. The project supports use of 4% Low-Income Housing Tax Credits for about 20% of the units or 59 units at about \$1.05/SF or \$840/month. This leaves about 235 units for market rate rents at about \$1.50/SF or \$1200/month. Commercial rents are kept attractive at an estimated \$10/SF as the retail and other commercial uses are designed to serve the project and surrounding residents and employees.







The Canton Corners Shopping Center Redevelopment could be attractive to the following market tapestries (for more information on the following tapestry segments see Appendix A):

- » **Metro Renters** - Typically younger, highly mobile residents who live close to their job with most of their income going to rent, clothes, and the latest technology.
- » **Young and Restless** - Educated, young workers employed in professional or technical occupations looking to make big strides in improving themselves.
- » **Bright Young Professionals** - Located in urban outskirts of large metro areas, this tapestry is young, educated, and working professionals who are generally white-collar and are physically active residents.
- » **NeWest Residents** – Young and new to career Hispanic residents who are still getting their roots.
- » **Emerald City** - Young, well-educated residents of lower-density neighborhoods in urban areas, these communities make close to the US median income and balance long hours on the internet with time in the gym.
- » **Metro Fusion** - Hard-working, young, diverse market of residents who may not speak English fluently, but are dedicated to climbing the ladder in their professional and social lives.
- » **Old and Newcomers** - Primarily in neighborhoods in transition, this tapestry is populated by renters either beginning their careers or retiring.
- » **City Commons** - Comprised of young, single-parent and single-person households living within large, metro areas with a third having a college degree.
- » **Front Porches** – Young families that are still starting out and tend to live in older homes, duplexes, or townhomes.
- » **Hardscrabble Road** - More established families and single parents in urban cores, typically in older homes
- » **Up and Coming Families** – Younger and more mobile residents just starting their family and they are one of the fastest-growing markets in America.



### CANTON MARKET PLACE/NORTHSIDE HOSPITAL AREA

Canton Market Place and the New Northside Hospital Area has seen significant new development from projects focused on healthcare and commercial uses. These catalytic projects are opening new market opportunities for residential development. There is a significant amount of developable land between the Northside Hospital

site which anchors the areas southern edge, and the Canton Marketplace which anchors the northern edge of the area along Cumming Highway. During this housing study, a 50-acre site was identified and is illustrated in the image below. This site could support new market rate and affordable workforce housing for hospital employees including doctors and other professionals.



Development would be in between the new hospital and Canton Marketplace though it may make sense to locate initial development closer to commercial development at the Marketplace to promote walkability to this area. The site is near I-575 which increases access to other employment centers.

There are existing development plans for this which are led by Northside Hospital. It is recommended that the city support this long-term master plan. There may be opportunities for the city to work with the hospital to determine a potential mix of affordable, workforce,

and market rate housing options on the site. Most likely, affordable and workforce housing would make up a small percentage of units (10-20%) that would provide housing for many entry-level local retail and employees, especially those working at the hospital. In total, it is anticipated that the 50-acre site could support upwards of 750-1,000 units.

The Canton Marketplace/Northside Hospital development area could be attractive to the following market tapestries (for more information on the following tapestry segments see Appendix A):



- » **Metro Renters** - Typically younger, highly mobile residents who live close to their job with most of their income going to rent, clothes, and the latest technology.
- » **Professional Pride** - Well-educated career professionals looking to maintain their upscale, suburban lifestyles who take pride in their new homes.
- » **Boomburbs** - Well-educated professionals that have a running start on prosperity who are marked with high mortgages and rapid, booming housing growth.
- » **Up and Coming Families** – Younger and more mobile residents just starting their family and they are one of the fastest-growing markets in America.
- » **Soccer Moms** - Affluent, family-oriented residents who favor time-saving devices such as online banking to keep up with the hectic pace of a two-working parent household.
- » **Middleburg** – Semirural subdivision residents. Typically, conservative, and family-oriented consumers.
- » **Enterprising Professionals** - Well-educated, mainly in STEM fields and live in rented homes and are part of a fast-growing market in lower density neighborhoods.
- » **Young and Restless** - Educated, young workers employed in professional or technical occupations looking to make big strides in improving themselves.
- » **Bright Young Professionals** - Located in urban outskirts of large metro areas, this tapestry is young, educated, and working professionals who are generally white-collar and are physically active residents.
- » **Urban Chic** - Busy, well-connected, well-educated consumers who are environmentally active and financial stable with a sophisticated, exclusive lifestyle.
- » **Savvy Suburbanites** - Well-educated, well-read families that include empty nesters or parents with adult children living at home who are located in older neighborhoods outside the urban core.
- » **Southern Satellites** - Nondiverse, older, married families that own their homes with a third being mobile homes who work in industries such as manufacturing, healthcare, and construction.
- » **NeWest Residents** – Young and new to career Hispanic residents who are still getting their roots.
- » **Emerald City** - Young, well-educated residents of lower-density neighborhoods in urban areas, these communities make close to the US median income and balance long hours on the internet with time in the gym.
- » **Green Acres** - Include country living and self-reliance with a focus on remodeling their homes with the right tools.
- » **Home Improvement** - Working, owner occupied homes who spend a lot of time on the move with weekends focused on home improvement.
- » **American Dreamers** - Single-family households with children, very diverse, with spending habits focused on members of the household rather than the home.
- » **Old and Newcomers** - Primarily in neighborhoods in transition, this tapestry is populated by renters either beginning their careers or retiring.
- » **Down the Road** - Households where half live in mobile homes, these communities are diverse with members working in industries such as service, rental trad, manufacturing, and construction.
- » **Family Foundations** - Faith and family together, residents work in the heal care and public administration industries with important placed on clothing and smartphones.
- » **Front Porches** – Young families that are still starting out and tend to live in older homes, duplexes, or townhomes.
- » **The Great Outdoors** - Educated empty nesters living an active, but modest lifestyle focused on gardening and home-cooked meals.
- » **Rustbelt Traditions** - Stable, hard-working consumers with jobs primarily in white collar that have an average net worth of \$400,000.



### FORMER NORTHSIDE HOSPITAL SITE

During Stakeholder interviews, the former Northside Hospital sites was one of the most identified locations in Canton that could support new housing development. The site is in a centralized and prominent location in the city and offers a large amount of developable land. New development projects do need to account for traffic congestion and density challenges as the city is not willing to support projects that would contribute to these issues.

This project site offers a number of different development options. From discussion with stakeholders and City officials, the 15-acre site would be most desired for residential development that could fit into the context of the surrounding neighborhoods without overwhelming them in terms of design or traffic. The residential development could support several different housing typologies. The size of the real estate allows the development density to scale up from the edges of the property to the core in the center being the most densely developed portion of the site. This would allow the development not to overwhelm the surrounding neighborhood context. The edge of the real estate closest to existing residential homes could be developed as for-sale two-story townhomes that could have sale prices ranging from \$200,000 to \$250,000. This may allow for about 60 townhomes. Moving toward the

center of the property could be a 3-story multi-family development of 120,000 SF. This would provide for about 125 apartment units. In the center of the development could be 5-story multi-family development that may be 300,000 SF. This could provide for around 315 apartment units. The goal would be to have a variety of units and price points for the apartments. The development could blend household incomes by using a LIHTC 4% to support about 185 units for working adults who earn just below 80% of the area median income. This center 5-story building could have special amenities such as a roof-top venue for resident and community use that would have a panoramic view over the City of Canton and the Etowah River to the south





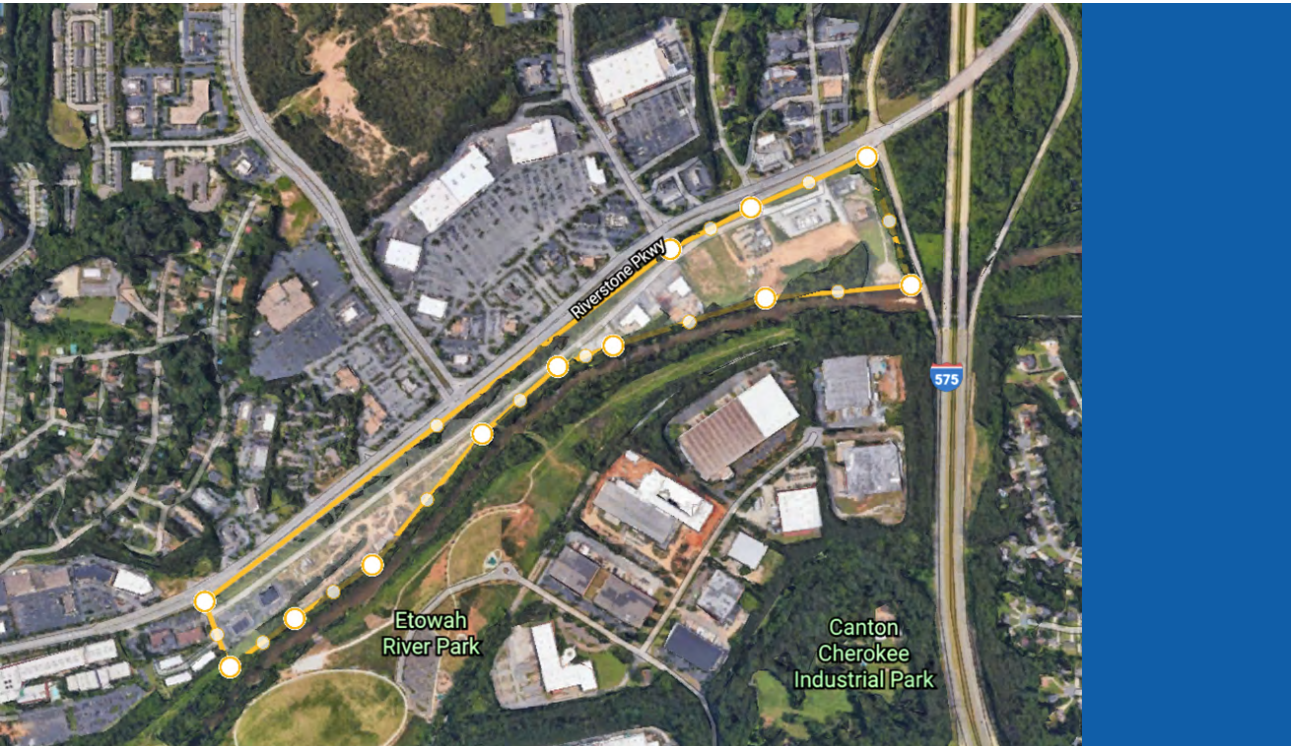
The Former Northside Hospital site could be attractive to the following market tapestries (for more information on the following tapestry segments see Appendix A):

- » **Metro Renters** - Typically younger, highly mobile residents who live close to their job with most of their income going to rent, clothes, and the latest technology.
- » **Up and Coming Families** - Younger and more mobile residents just starting their family and they are one of the fastest-growing markets in America.
- » **Middleburg** - Semirural subdivision residents. Typically, conservative, and family-oriented consumers.
- » **Young and Restless** - Educated, young workers employed in professional or technical occupations looking to make big strides in improving themselves.
- » **Bright Young Professionals** - Located in urban outskirts of large metro areas, this tapestry is young, educated, and working professionals who are generally white-collar and are physically active residents.
- » **NeWest Residents** - Young and new to career Hispanic residents who are still getting their roots.
- » **Emerald City** - Young, well-educated residents of lower-density neighborhoods in urban areas, these communities make close to the US median income and balance long hours on the internet with time in the gym.
- » **Green Acres** - Include country living and self-reliance with a focus on remodeling their homes with the right tools.
- » **Home Improvement** - Working, owner occupied homes who spend a lot of time on the move with weekends focused on home improvement.
- » **Metro Fusion** - Hard-working, young, diverse market of residents who may not speak English fluently, but are dedicated to climbing the ladder in their professional and social lives.
- » **American Dreamers** - Single-family households with children, very diverse, with spending habits focused on members of the household rather than the home.
- » **Old and Newcomers** - Primarily in neighborhoods in transition, this tapestry is populated by renters either beginning their careers or retiring.
- » **City Commons** - Comprised of young, single-parent and single-person households living within large, metro areas with a third having a college degree.
- » **Down the Road** - Households where half live in mobile homes, these communities are diverse with members working in industries such as service, rental trad, manufacturing, and construction.
- » **Family Foundations** - Faith and family together, residents work in the heal care and public administration industries with important placed on clothing and smartphones.
- » **Front Porches** - Young families that are still starting out and tend to live in older homes, duplexes, or townhomes.
- » **The Great Outdoors** - Educated empty nesters living an active, but modest lifestyle focused on gardening and home-cooked meals.
- » **Rustbelt Traditions** - Stable, hard-working consumers with jobs primarily in white collar that have an average net worth of \$400,000.
- » **Hardscrabble Road** - More established families and single parents in urban cores, typically in older homes.



## RIVERSTONE AREA

The Riverstone Area includes two prime development sites that have already undergone significant master planning efforts. It is recommended that the city supports these plans and projects to increase the diversity of housing types in this area with connectivity to downtown Canton.



### Riverstone – Etowah River Site

The area between the south side of the Riverstone Parkway and Etowah River is relatively narrow 40-acre site. A brief review of FEMA flood maps indicates that most of this acreage is out of the floodway. The floodway and floodplain fall to the south side of the Etowah River over land that has already been converted to City parks and trails. This provides an opportunity to have connecting pedestrian and bike bridge to the south side park lands as well as connectivity to commercial retail along Riverstone Parkway.

It is estimated that a variety of housing typologies could be incorporated into this multi-phase development project. The site could mix townhomes along with condominiums and apartments with top dollar for those units the provide views of the Etowah River and parks lands to the south of the river. This development would be market rate for-sale rent products. It is anticipated that between 750 and 1100 total units could be proposed for this riverfront development site.



The Etowah River site could be attractive to the following market tapestries (for more information on the following tapestry segments see Appendix A):

- » **Metro Renters** - Typically younger, highly mobile residents who live close to their job with most of their income going to rent, clothes, and the latest technology.
- » **Professional Pride** - Well-educated career professionals looking to maintain their upscale, suburban lifestyles who take pride in their new homes.
- » **Boomburbs** - Well-educated professionals that have a running start on prosperity who are marked with high mortgages and rapid, booming housing growth.
- » **Up and Coming Families** – Younger and more mobile residents just starting their family and they are one of the fastest-growing markets in America.
- » **Soccer Moms** - Affluent, family-oriented residents who favor time-saving devices such as online banking to keep up with the hectic pace of a two-working parent household.
- » **Middleburg** – Semirural subdivision residents. Typically, conservative, and family-oriented consumers.
- » **Enterprising Professionals** - Well-educated, mainly in STEM fields and live in rented homes and are part of a fast-growing market in lower density neighborhoods.
- » **Young and Restless** - Educated, young workers employed in professional or technical occupations looking to make big strides in improving themselves.
- » **Bright Young Professionals** - Located in urban outskirts of large metro areas, this tapestry is young, educated, and working professionals who are generally white-collar and are physically active residents.
- » **Urban Chic** - Busy, well-connected, well-educated consumers who are environmentally active and financially stable with a sophisticated, exclusive lifestyle.
- » **Savvy Suburbanites** - Well-educated, well-read families that include empty nesters or parents with adult children living at home who are located in older neighborhoods outside the urban core.
- » **Southern Satellites** - Nondiverse, older, married families that own their homes with a third being mobile homes.
- » **Green Acres** - Include country living and self-reliance with a focus on remodeling their homes with the right tools.
- » **Home Improvement** - Working, owner occupied homes who spend a lot of time on the move with weekends focused on home improvement.
- » **American Dreamers** - Single-family households with children, very diverse, with spending habits focused on members of the household rather than the home.
- » **Old and Newcomers** - Primarily in neighborhoods in transition, this tapestry is populated by renters either beginning their careers or retiring.
- » **Down the Road** - Households where half live in mobile homes, these communities are diverse with members working in industries such as service, rental trad, manufacturing, and construction.
- » **Family Foundations** - Faith and family together, residents work in the heal care and public administration industries with important placed on clothing and smartphones.
- » **Front Porches** – Young families that are still starting out and tend to live in older homes, duplexes, or townhomes.
- » **The Great Outdoors** - Educated empty nesters living an active, but modest lifestyle focused on gardening and home-cooked meals.
- » **Rustbelt Traditions** - Stable, hard-working consumers with jobs primarily in white collar that have an average net worth of \$400,000.





### Riverstone II & III

This major development site is really a set of catalytic projects for Canton northeast side of town. It includes a variety of commercial and residential uses built out over the next 1-5 years. The City should help the development team with the entitlement process, but most if not all the residential development will be market rate for-sale and rental product. The development will have plenty of space to scale-up the residential components that the City may not need to participate in any direct subsidy to close any development financing gaps.

Phase II is the lower 55-acre site that will be a mix of commercial and residential uses. Phase III will be the upper 175-acre portion of the site, and it may include much more residential development along with potential institutional uses as well. This site provides excellent connectivity to Canton's greenway trails, Riverstone Parkway commercial corridor, and to I-75 at the Riverstone Parkway interchange.





Riverstone II and III sites could be attractive to the following market tapestries (for more information on the following tapestry segments see Appendix A):

- » **Metro Renters** - Typically younger, highly mobile residents who live close to their job with most of their income going to rent, clothes, and the latest technology.
- » **Professional Pride** - Well-educated career professionals looking to maintain their upscale, suburban lifestyles who take pride in their new homes.
- » **Boomburbs** - Well-educated professionals that have a running start on prosperity who are marked with high mortgages and rapid, booming housing growth.
- » **Up and Coming Families** – Younger and more mobile residents just starting their family and they are one of the fastest-growing markets in America.
- » **Soccer Moms** - Affluent, family-oriented residents who favor time-saving devices such as online banking to keep up with the hectic pace of a two-working parent household.
- » **Middleburg** – Semirural subdivision residents. Typically, conservative, and family-oriented consumers.
- » **Enterprising Professionals** - Well-educated, mainly in STEM fields and live in rented homes and are part of a fast-growing market in lower density neighborhoods.
- » **Young and Restless** - Educated, young workers employed in professional or technical occupations looking to make big strides in improving themselves.
- » **Bright Young Professionals** - Located in urban outskirts of large metro areas, this tapestry is young, educated, and working professionals who are generally white-collar and are physically active residents.





- » **Urban Chic** - Busy, well-connected, well-educated consumers who are environmentally active and financial stable with a sophisticated, exclusive lifestyle.
- » **Savvy Suburbanites** - Well-educated, well-read families that include empty nesters or parents with adult children living at home who are located in older neighborhoods outside the urban core.
- » **Southern Satellites** - Nondiverse, older, married families that own their homes with a third being mobile homes.
- » **Green Acres** - Include country living and self-reliance with a focus on remodeling their homes with the right tools.
- » **Home Improvement** - Working, owner occupied homes who spend a lot of time on the move with weekends focused on home improvement.
- » **American Dreamers** - Single-family households with children, very diverse, with spending habits focused on members of the household rather than the home.
- » **Old and Newcomers** - Primarily in neighborhoods in transition, this tapestry is populated by renters either beginning their careers or retiring.
- » **Down the Road** - Households where half live in mobile homes, these communities are diverse with members working in industries such as service, rental trad, manufacturing, and construction.
- » **Family Foundations** - Faith and family together, residents work in the heal care and public administration industries with importance placed on clothing and smartphones.
- » **The Great Outdoors** - Educated empty nesters living an active, but modest lifestyle focused on gardening and home-cooked meals.
- » **Rustbelt Traditions** - Stable, hard-working consumers with jobs primarily in white collar that have an average net worth of \$400,000.



### DOWNTOWN CANTON

This housing study identifies five key housing sites in Downtown Canton. Downtown Canton has strong commercial uses but lacks significant residential development that could drive 24-hour activity in the city's core. Many stakeholders stated there is a desire to promote residential development in downtown and the bones to support residential opportunities clearly exist through a variety of existing buildings. Neighborhood

redevelopment focused on historic mill housing could also be a focus of downtown redevelopment efforts to promote a mix of single- and multi-family developments. New development or redevelopment efforts in downtown that incorporate the five sites identified below, could enhance vibrancy of downtown and make this part of Canton a stronger destination for local residents to live, work, and play.



This neighborhood on the NW side of downtown could be a pilot for housing preservation and renovation. With about twenty homes, a program could be put in place that supports current homeowners with necessary renovations, and the program could assist landlords to make necessary structural and maintenance improvements to the rental homes within the neighborhood.

This project site on the immediate southwest corner of Canton's downtown represents a major catalytic project for the City. This project will act as physical and psychological bridge between downtown Canton and the major Etowah Mill redevelopment project. It will consist of a parking structured wrapped with higher end market rate apartments and condominiums. The City should participate in the entitlement process and use resources as may be necessary to support this major new downtown redevelopment project.





03



The City-owned property east of the city square could be a blend of hotel suites and loft style apartments in the upper floors with ground floor uses focused on professional service businesses. It's location in the center of downtown would allow for a higher than average market rents per square foot. (See financial write-up as well)

These apartments appear to be in relatively good condition but should either be modernized given the downtown location or removed and replaced with a slightly denser development that would attract higher market rents. Furthermore, a denser development on this site could potentially lease parking spaces from the County's parking garage if possible. This would allow this site to be denser with upwards of twice as many units on the site to between 50 - 60 apartment units.

04



These low-profile professional office buildings could be replaced with denser 3-4 story mixed-use development that would keep the professional offices on the ground floor while introducing more higher market rate apartments on the upper floors. The bank could participate in the financing along with other professional executives already located on this site.

05





This project would demolish low level professional office building to be replaced by a new four-story mixed-use project. The building is estimated at about 18,600 SF. Project would be professional office uses on the ground floor and then the upper levels would be luxury apartments / condominiums. This translates to about 6,200 SF of professional office space on the ground levels. There could be 16 luxury apartments/condos in the upper floor space. Luxury market rate rents would be at least \$1.50 SF or about \$1,125/month in units of 750 SF. The professional office space with rent at about \$20/SF that could be for the existing bank and professional offices that are currently on-site. The bank could play a leading role in the development financing of the project with other professionals on the development team if desired to play a leading role in development or a junior role.

Development and Redevelopment in Downtown Canton could be attractive to the following market tapestries (for more information on the following tapestry segments see Appendix A):

- » **Metro Renters** - Typically younger, highly mobile residents who live close to their job with most of their income going to rent, clothes, and the latest technology.
- » **Professional Pride** - Well-educated career professionals looking to maintain their upscale, suburban lifestyles who take pride in their new homes.
- » **Enterprising Professionals** - Well-educated, mainly in STEM fields and live in rented homes and are part of a fast-growing market in lower density neighborhoods.
- » **Young and Restless** - Educated, young workers employed in professional or technical occupations looking to make big strides in improving themselves.
- » **Bright Young Professionals** - Located in urban outskirts of large metro areas, this tapestry is young, educated, and working professionals who are generally white-collar and are physically active residents.
- » **Emerald City** - Young, well-educated residents of lower-density neighborhoods in urban areas, these communities make close to the US median income and balance long hours on the internet with time in the gym.
- » **Green Acres** - Include country living and self-reliance with a focus on remodeling their homes with the right tools.
- » **Home Improvement** - Working, owner occupied homes who spend a lot of time on the move with weekends focused on home improvement.
- » **Top Tier** - The wealthiest Tapestry market, residents make on average three times the US household income and have the purchasing power to indulge in lavish homes, upscale consumer goods, and high-end shopping.
- » **Old and Newcomers** - Primarily in neighborhoods in transition, this tapestry is populated by renters either beginning their careers or retiring.
- » **Down the Road** - Households where half live in mobile homes, these communities are diverse with members working in industries such as service, rental trad, manufacturing, and construction.
- » **Family Foundations** - Faith and family together, residents work in the heal care and public administration industries with important placed on clothing and smartphones.
- » **Front Porches** - Young families that are still starting out and tend to live in older homes, duplexes, or townhomes.



### ESTATES - EAST RESERVOIR AREA ALONG BLUFF ROAD

There is an undeveloped area of approximately 165 acres along the eastern edge of the Hickory Log Creek Reservoir that may provide land and space for estate single-family residential development.

It is anticipated that each estate would have a minimum of 1-acre per property. This would allow for potentially between 75 to 100 estates between Hickory Log Creek Reservoir and Bluff Road. The relatively easy access to I-575 from the east side of the reservoir south along Bluff Road to the I-575 Riverstone interchange make these estate sites very convenient for traveling and commuting to executive management locations throughout the greater northern suburbs of Atlanta.

Estates would range in price from \$1,000,000 up to \$5,000,000 along the reservoir. These homes would be in the range of 5,000 SF to 7,000 SF and would have individual property amenities that are customized for their owners. Private dock access to the reservoir and private greenway trails along the edges of the estates may be common for all property owners within this broad development area. An emphasis could be developed around common amenities that support lifestyles centered on physical and mental health and wellness.

Development and Redevelopment in the Estates area could be attractive to the following market tapestries (for more information on the following tapestry segments see Appendix A):

- » **Professional Pride** - Well-educated career professionals looking to maintain their upscale, suburban lifestyles who take pride in their new homes.
- » **Top Tier** - The wealthiest Tapestry market, residents make on average three times the US household income and have the purchasing power to indulge in lavish homes, upscale consumer goods, and high-end shopping.






An aerial photograph of a golf course clubhouse and surrounding greenery. The clubhouse is a large, multi-story building with a prominent entrance, situated on a grassy hill. The clubhouse is surrounded by dense trees and a well-maintained golf course. A large pond or lake is visible in the foreground, reflecting the sky and the surrounding landscape. The entire image is overlaid with a semi-transparent blue filter.

# APPENDIX A



# TOP TAPESTRY HOUSEHOLD PROFILES CANTON, GA REGIONAL MARKET

The following information details the most dominant tapestries within a 45-minute drive of the City of Canton.

- 
- » Boomburbs
  - » Up and Coming Families
  - » Metro Renters
  - » Enterprising Professionals
  - » Soccer Moms
  - » Middleburg
  - » Professional Pride
  - » Young and Restless
  - » Bright Young Professionals
  - » NeWest Residents
  - » Metro Fusion
  - » American Dreamers
  - » Urban Chic
  - » Emerald City
  - » Green Acres
  - » Down the Road
  - » Savvy Suburbanites
  - » The Great Outdoors
  - » Southern Satellite
  - » Home Improvement
  - » Top Tier
  - » Old and Newcomers
  - » Front Porches
  - » City Commons
  - » Family Foundations
  - » Rustbelt Traditions
  - » Hardscrabble Road

# LifeMode Group: Affluent Estates Boomburbs

Households: 2,004,400

Average Household Size: 3.25

Median Age: 34.0

Median Household Income: \$113,400



## WHO ARE WE?

This is the new growth market, with a profile similar to the original: young professionals with families that have opted to trade up to the newest housing in the suburbs. The original Boomburbs neighborhoods began growing in the 1990s and continued through the peak of the housing boom. Most of those neighborhoods are fully developed now. This is an affluent market but with a higher proportion of mortgages. Rapid growth still distinguishes the Boomburbs neighborhoods, although the boom is more subdued now than it was 10 years ago. So is the housing market. Residents are well-educated professionals with a running start on prosperity.

## OUR NEIGHBORHOOD

- Growth markets are in the suburban periphery of large metropolitan areas.
- Young families are married with children (Index 220); average household size is 3.25.
- Home ownership is 84% (Index 134), with the highest rate of mortgages, 71.5% (Index 173).
- Primarily single-family homes, in new neighborhoods, 66% built since 2000 (Index 441).
- Median home value is \$350,000 (Index 169).
- Lower housing vacancy rate at 3.7%.
- The cost of affordable new housing comes at the expense of one of the longest commutes to work, over 30 minutes average, including a disproportionate number (33.6%) commuting across county lines (Index 141).

## SOCIOECONOMIC TRAITS

- Well educated young professionals, 55% are college graduates (Index 178).
- Unemployment is low at 3.3% (Index 61); high labor force participation at 71.3% (Index 114); most households have more than two workers (Index 124).
- Longer commute times from the suburban growth corridors have created more home workers (Index 156).
- They are well connected: own the latest devices and understand how to use them efficiently; biggest complaints—too many devices and too many intrusions on personal time.
- Financial planning is well under way for these professionals.



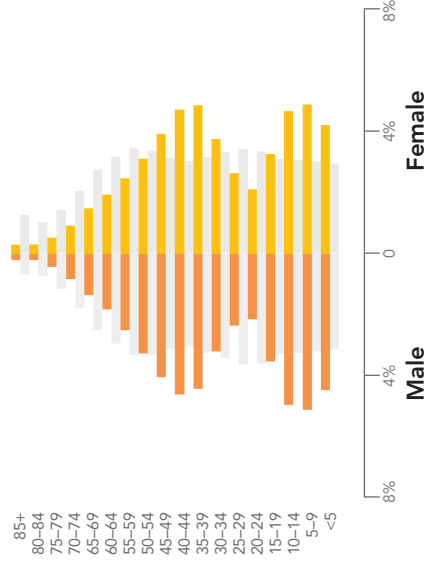
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



## AGE BY SEX (Esri data)

**Median Age: 34.0** US: 38.2

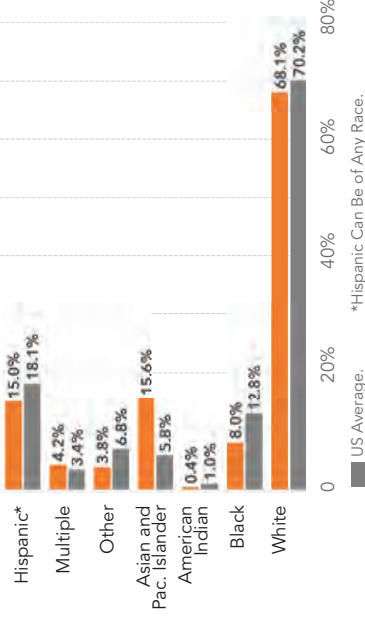
■ Indicates US



## RACE AND ETHNICITY (Esri data)

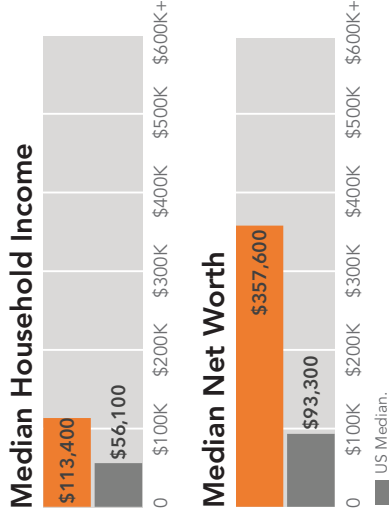
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 63.2** US: 64.0



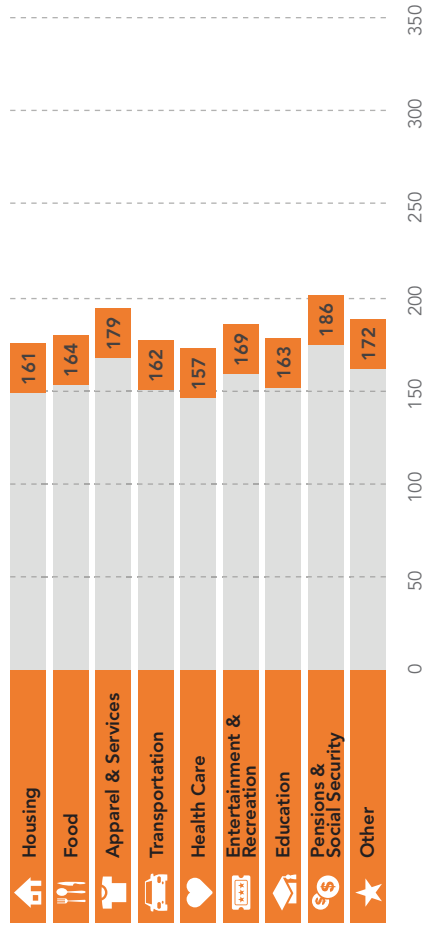
## INCOME AND NET WORTH

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.



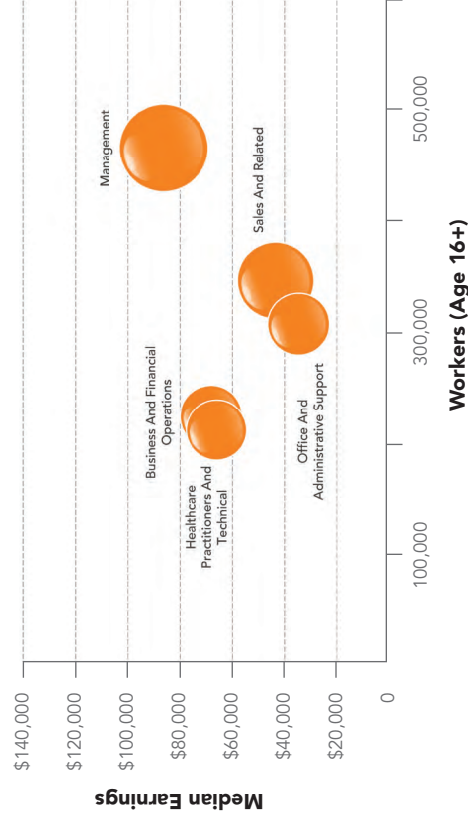
## AVERAGE HOUSEHOLD BUDGET INDEX

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



## OCCUPATION BY EARNINGS

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



## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Boomburbs residents prefer late model imports, primarily SUVs, and also luxury cars and minivans.
- This is one of the top markets for the latest in technology, from smartphones to tablets to Internet connectable televisions.
- Style matters in the Boomburbs, from personal appearance to their homes. These consumers are still furnishing their new homes and already remodeling.
- They like to garden but more often contract for home services.
- Physical fitness is a priority, including club memberships and home equipment.
- Leisure includes a range of activities from sports (hiking, bicycling, swimming, golf) to visits to theme parks or water parks.
- Residents are generous supporters of charitable organizations.

## 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.



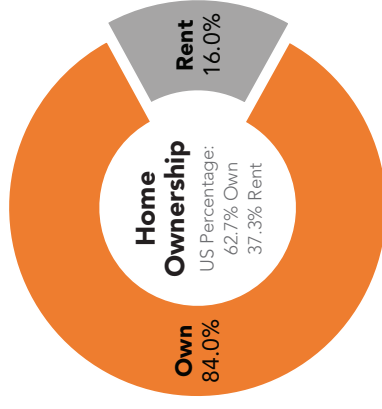
### Typical Housing:

Single Family

### Median Value:

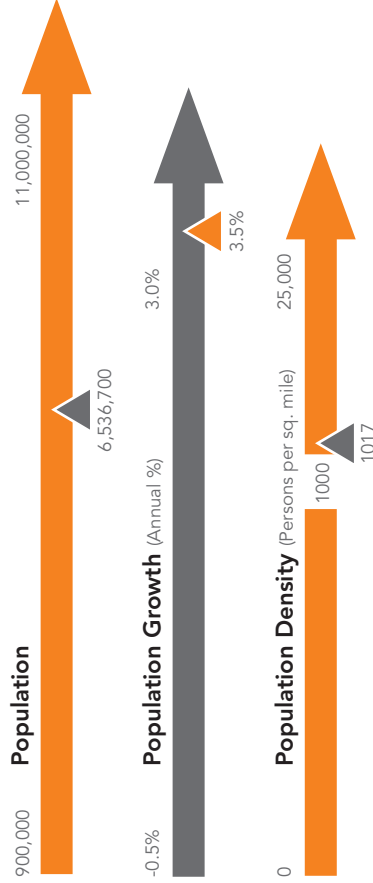
\$350,000

US Median: \$207,300



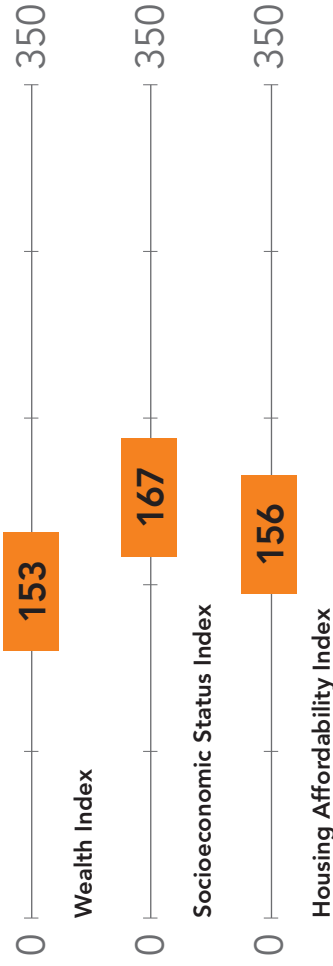
## POPULATION CHARACTERISTICS

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.





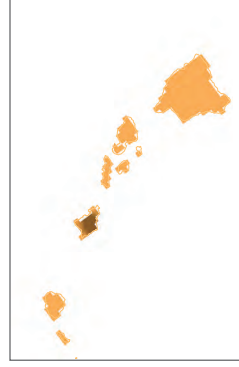
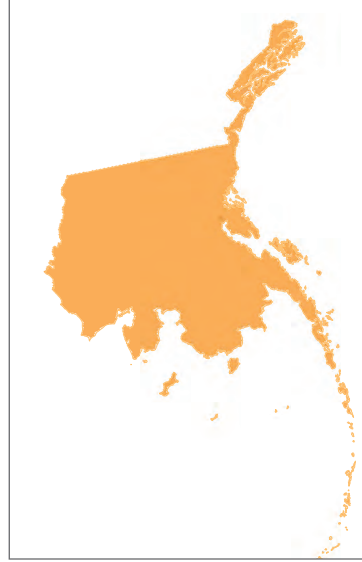
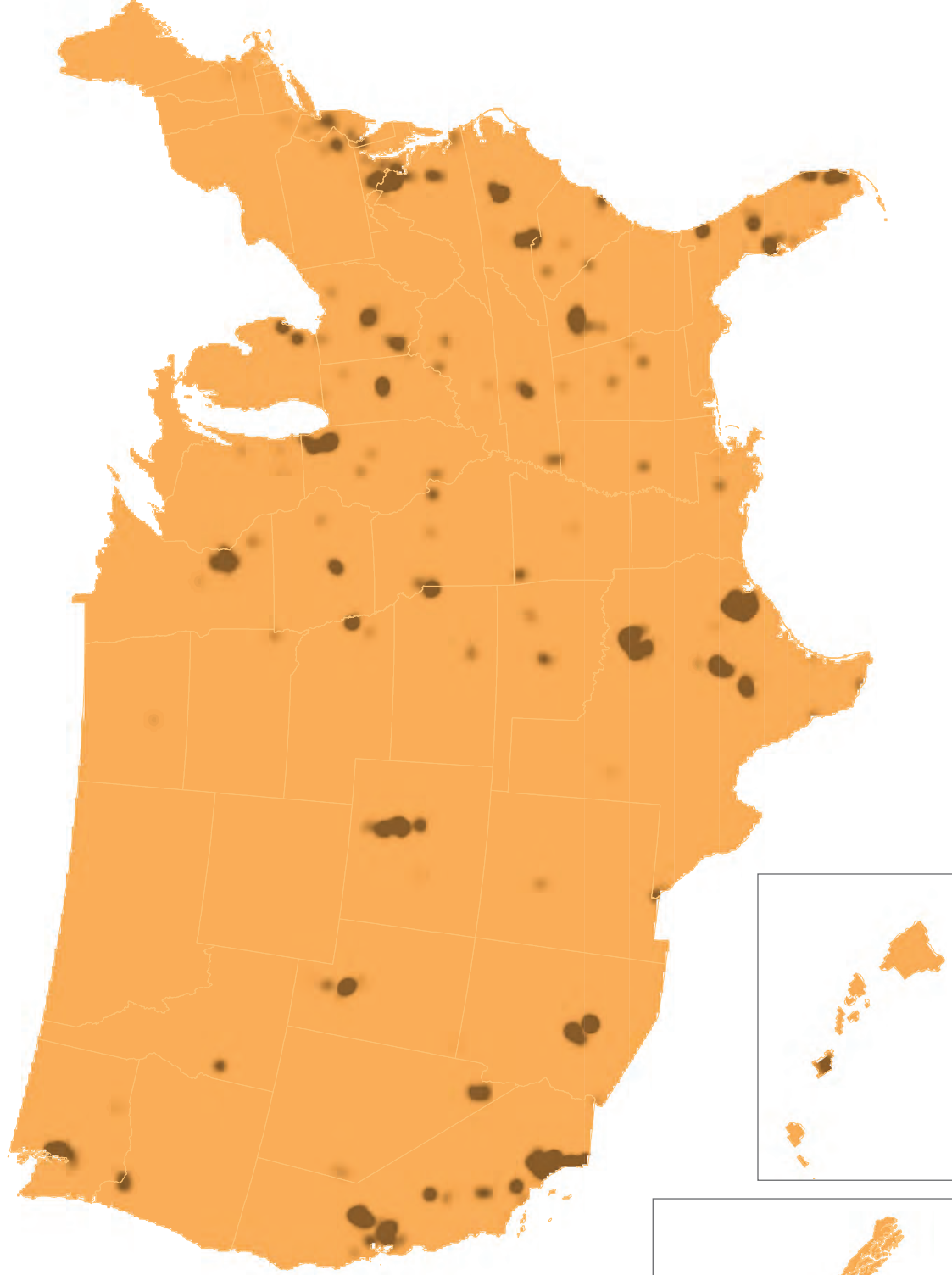
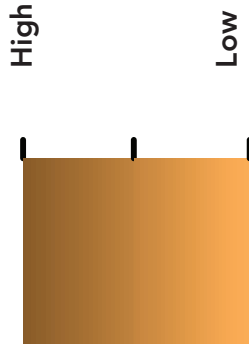


# LifeMode Group: Affluent Estates Boomburbs



## SEGMENT DENSITY

This map illustrates the density and distribution of the Boomburbs Tapestry Segment by households.



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LifeMode Group: Ethnic Enclaves

# Up and Coming Families

7A

Households: 2,901,200

Average Household Size: 3.12

Median Age: 31.4

Median Household Income: \$72,000



## WHO ARE WE?

*Up and Coming Families* is a market in transition—residents are younger and more mobile and ethnically diverse than the previous generation. They are ambitious, working hard to get ahead, and willing to take some risks to achieve their goals. The recession has impacted their financial well-being, but they are optimistic. Their homes are new; their families are young. And this is one of the fastest-growing markets in the country.

## OUR NEIGHBORHOOD

- New suburban periphery: new families in new housing subdivisions.
- Building began in the housing boom of the 2000s and continues in this fast-growing market.
- Single-family homes with a median value of \$194,400 and a lower vacancy rate.
- The price of affordable housing: longer commute times (Index 217).

## SOCIOECONOMIC TRAITS

- Education: 67% have some college education or degree(s).
- Hard-working labor force with a participation rate of 71% (Index 114) and low unemployment at 4.6% (Index 84).
- Most households (61%) have 2 or more workers.
- Careful shoppers, aware of prices, willing to shop around for the best deals and open to influence by others' opinions.
- Seek the latest and best in technology.
- Young families still feathering the nest and establishing their style.



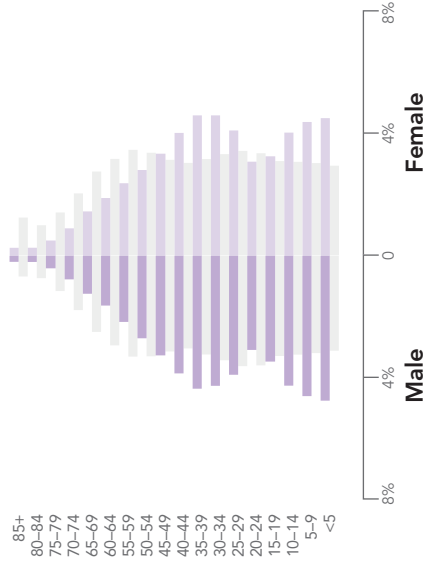
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



## AGE BY SEX (Esri data)

**Median Age: 31.4** US: 38.2

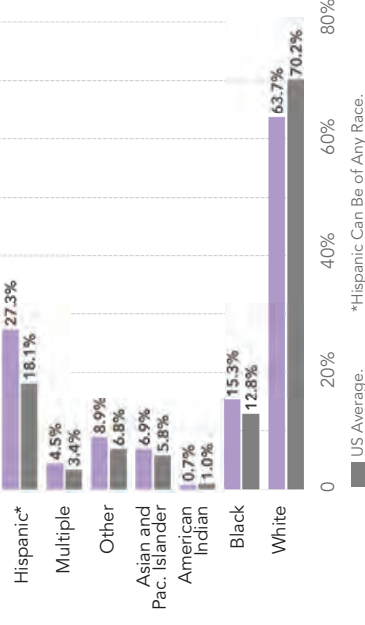
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## RACE AND ETHNICITY (Esri data)

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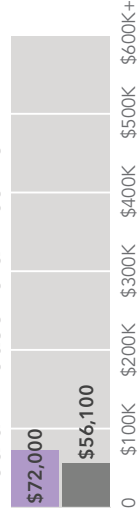
**Diversity Index: 73.9** US: 64.0



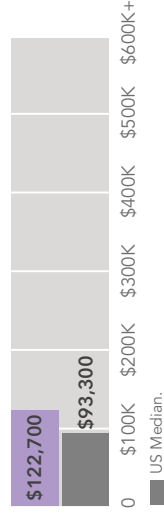
## INCOME AND NET WORTH

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### Median Household Income

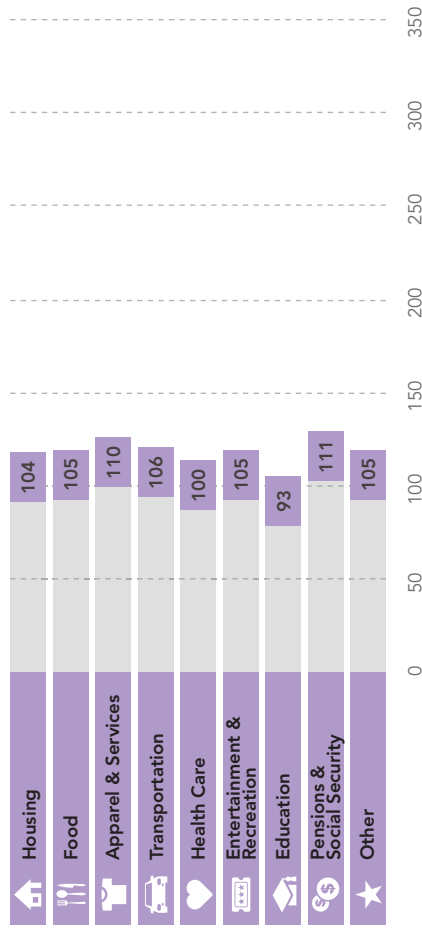


### Median Net Worth



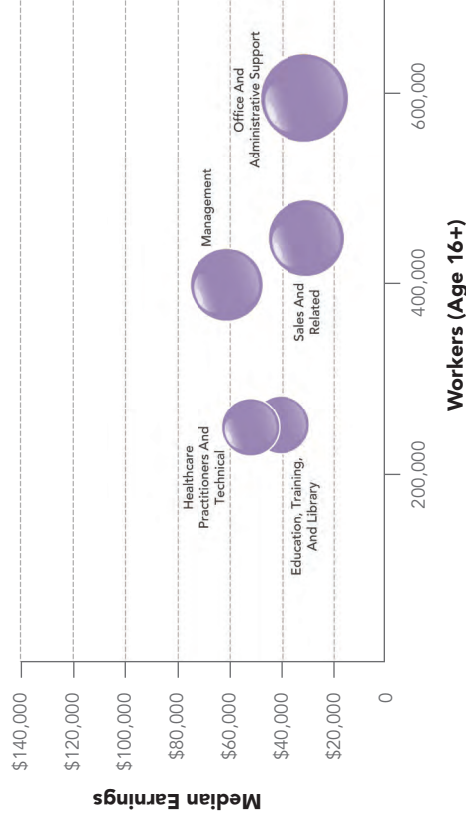
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## OCCUPATION BY EARNINGS

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



## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Rely on the Internet for entertainment, information, shopping, and banking.
- Prefer imported SUVs or compact cars, late models.
- Carry debt from credit card balances to student loans and mortgages, but also maintain retirement plans and make charitable contributions.
- Busy with work and family; use home and landscaping services to save time.
- Find leisure in family activities, movies at home, trips to theme parks or the zoo, and sports; from golfing, weight lifting, to taking a jog or run.

## HOUSING

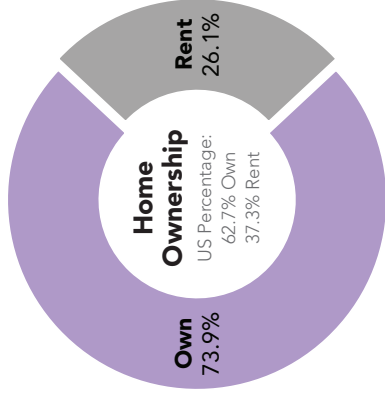
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**Typical Housing:**  
Single Family

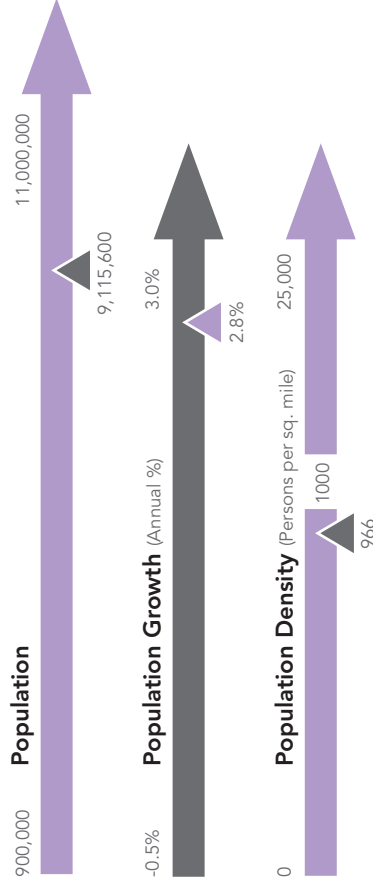
**Median Value:**  
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US Median: \$207,300



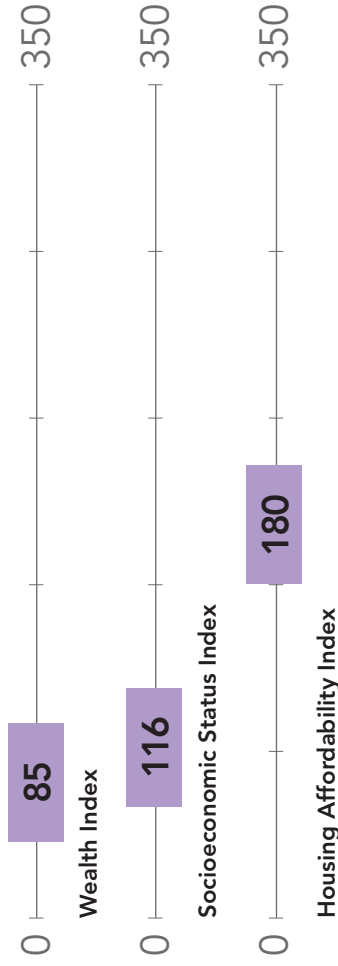
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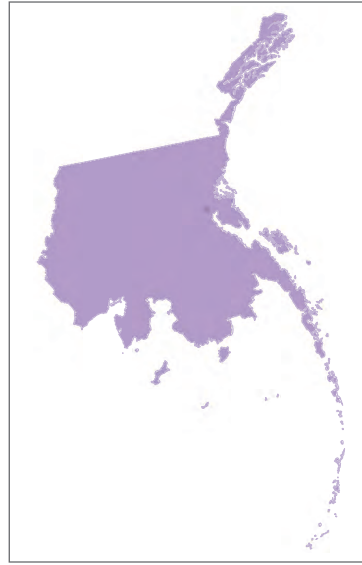
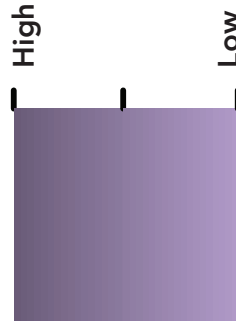
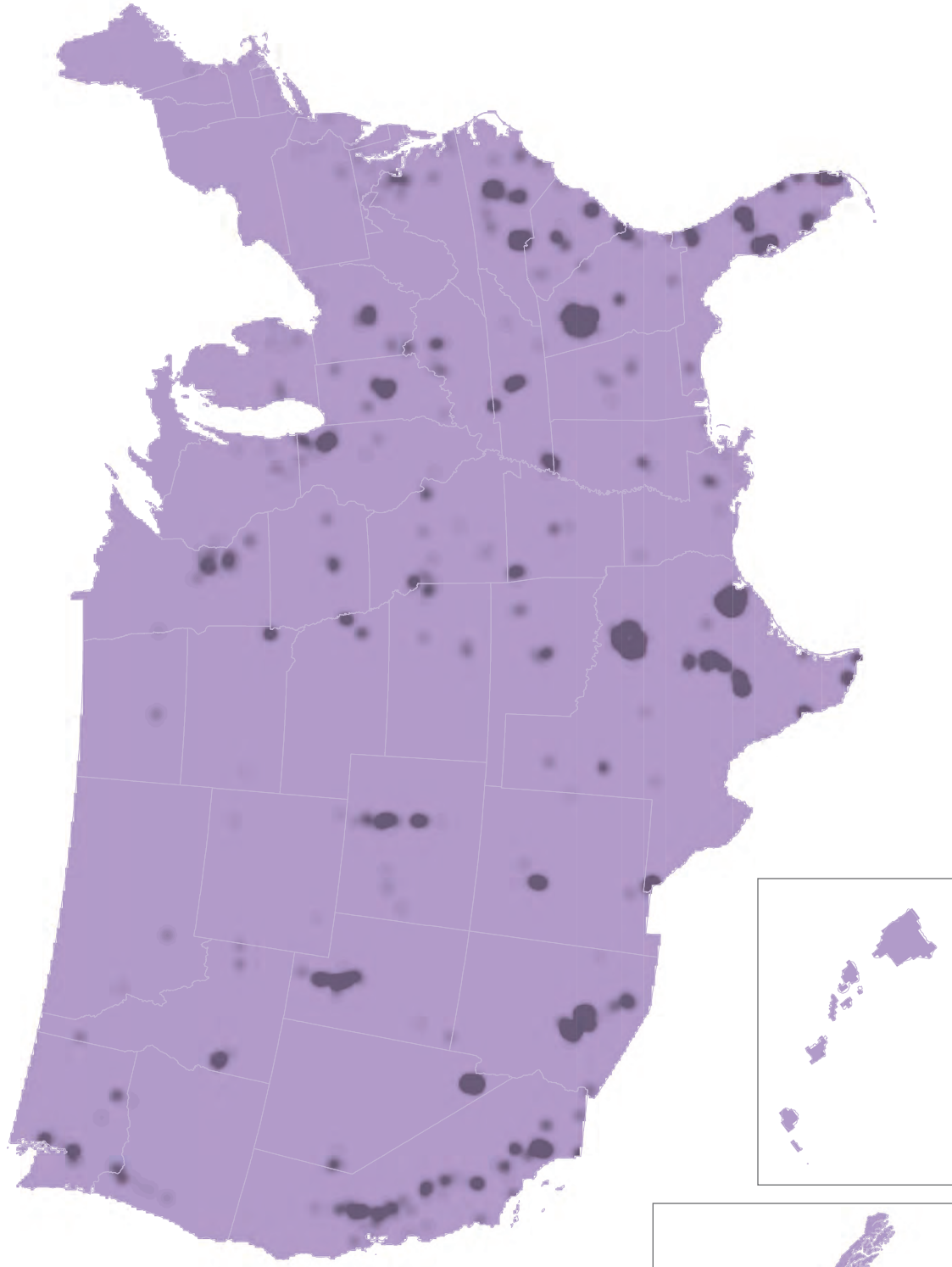




# Up and Coming Families

## SEGMENT DENSITY

This map illustrates the density and distribution of the *Up and Coming Families* Tapestry Segment by households.





LifeMode Group: Uptown Individuals

# Metro Renters

3B

Households: 1,911,500

Average Household Size: 1.67

Median Age: 32.5

Median Household Income: \$67,000

## WHO ARE WE?

Residents in this highly mobile and educated market live alone or with a roommate in older apartment buildings and condos located in the urban core of the city. This is one of the fastest growing segments; the popularity of urban life continues to increase for consumers in their late twenties and thirties. *Metro Renters* residents income is above the US average, but they spend a large portion of their wages on rent, clothes, and the latest technology. Computers and cell phones are an integral part of everyday life and are used interchangeably for news, entertainment, shopping, and social media. *Metro Renters* residents live close to their jobs and usually walk or take a taxi to get around the city.

## OUR NEIGHBORHOOD

- Over half of all households are occupied by singles, resulting in the smallest average household size among the markets, 1.67.
- Neighborhoods feature 20+ unit apartment buildings, typically surrounded by offices and businesses.
- Renters occupy close to 80% of all households.
- Public transportation, taxis, walking, and biking are popular ways to navigate the city.

## SOCIOECONOMIC TRAITS

- Well-educated consumers, many currently enrolled in college.
- Very interested in the fine arts and strive to be sophisticated; value education and creativity.
- Willing to take risks and work long hours to get to the top of their profession.
- Become well informed before purchasing the newest technology.
- Prefer environmentally safe products.
- Socializing and social status very important.



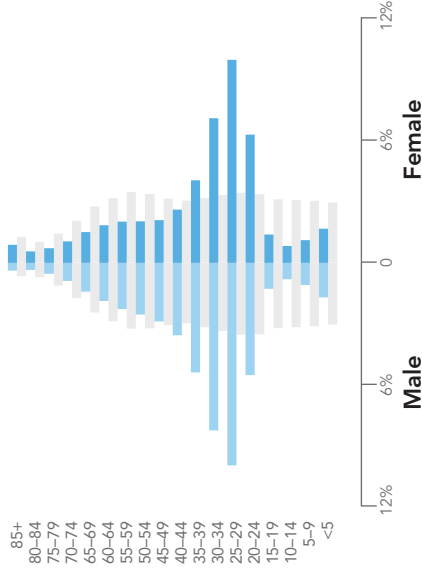
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



### AGE BY SEX (Esri data)

**Median Age: 32.5** US: 38.2

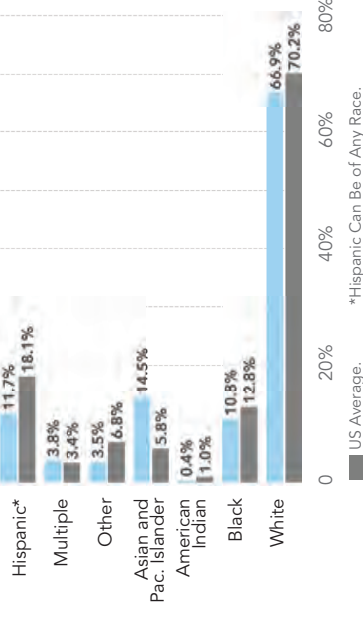
■ Indicates US



### RACE AND ETHNICITY (Esri data)

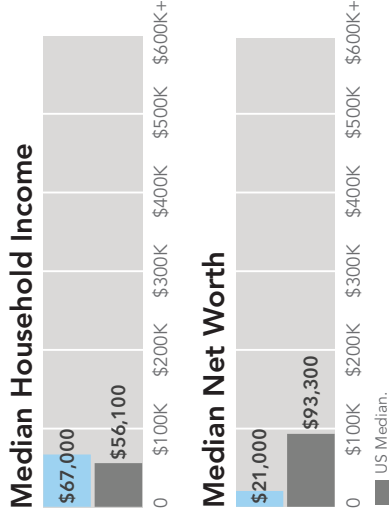
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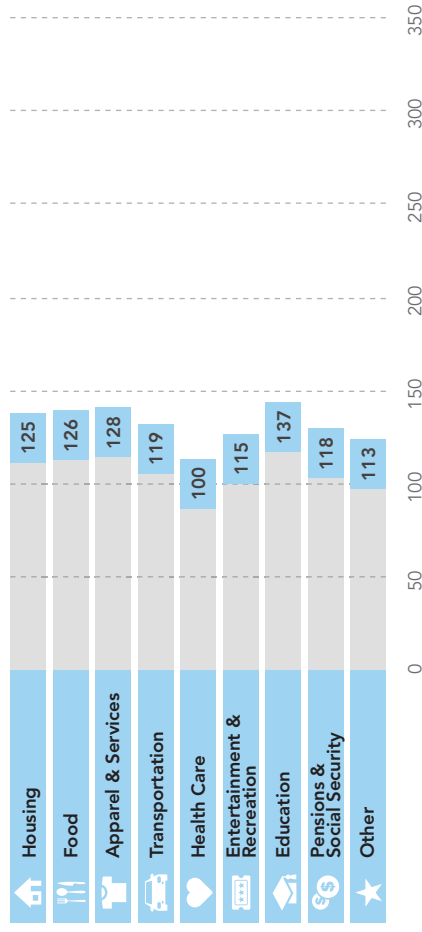
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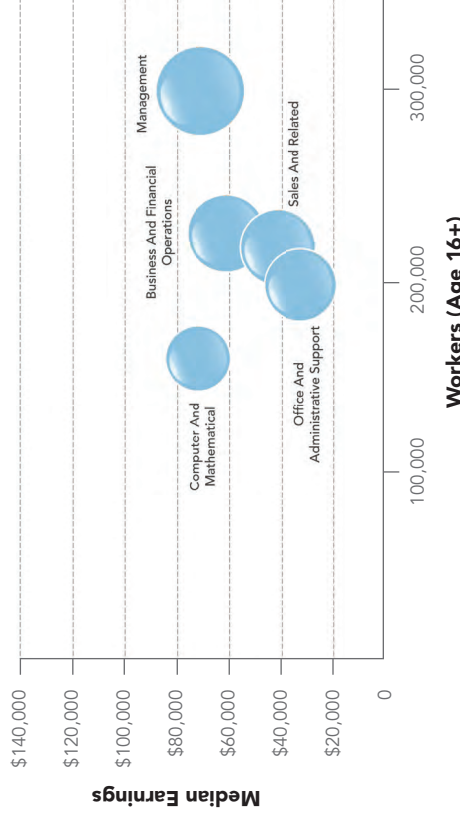
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### OCCUPATION BY EARNINGS

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



## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Enjoy wine at bars and restaurants.
- Shop at Trader Joe's and Whole Foods for groceries; partial to organic foods.
- Own a Mac computer and use it for reading/writing blogs, accessing dating websites, and watching TV programs and movies.
- Favorite websites: Facebook, Twitter, YouTube, and LinkedIn.
- Use a tablet for reading newspapers and magazines.
- Participate in leisure activities including yoga, Pilates, and downhill skiing.
- Shop for clothes at Banana Republic, The Gap, and Nordstrom.

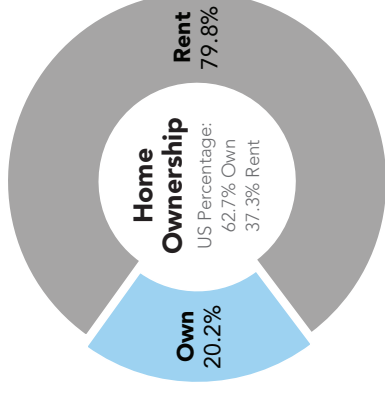
## HOUSING

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.



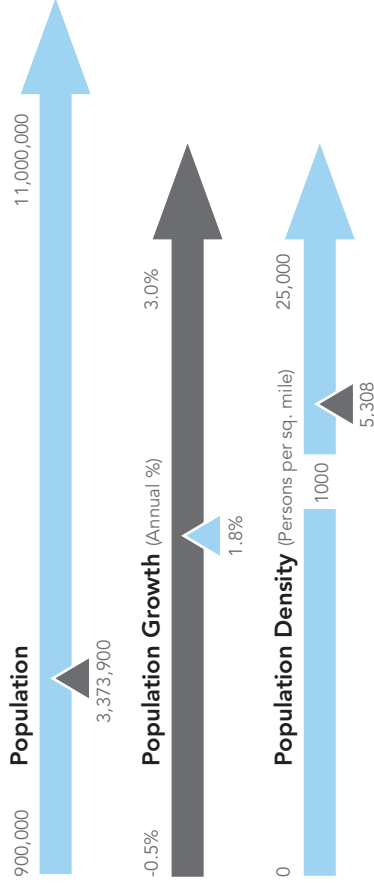
**Typical Housing:**  
 Multiunit Rentals

**Average Rent:**  
 \$1,430  
 US Average: \$1,038



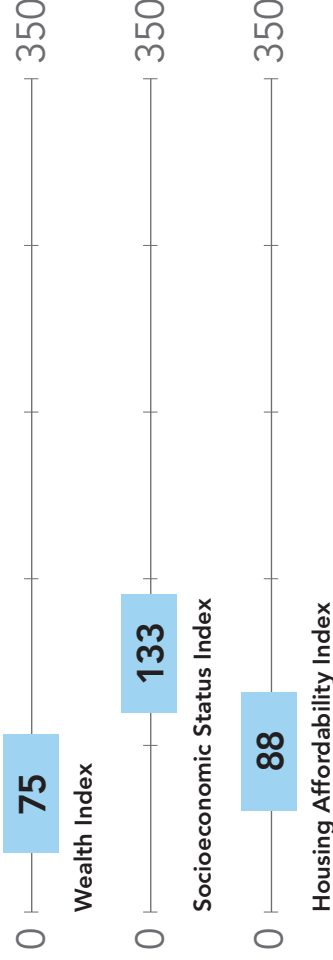
## POPULATION CHARACTERISTICS

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## ESRI INDEXES

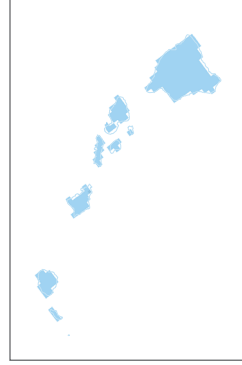
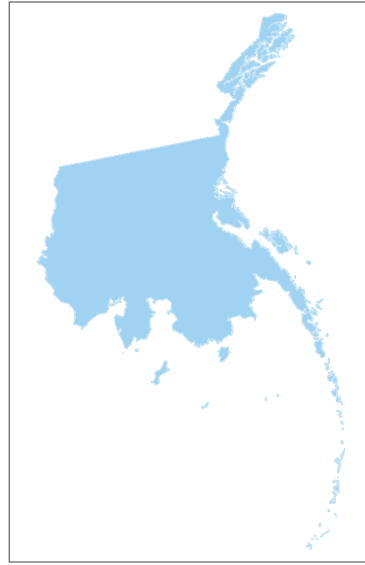
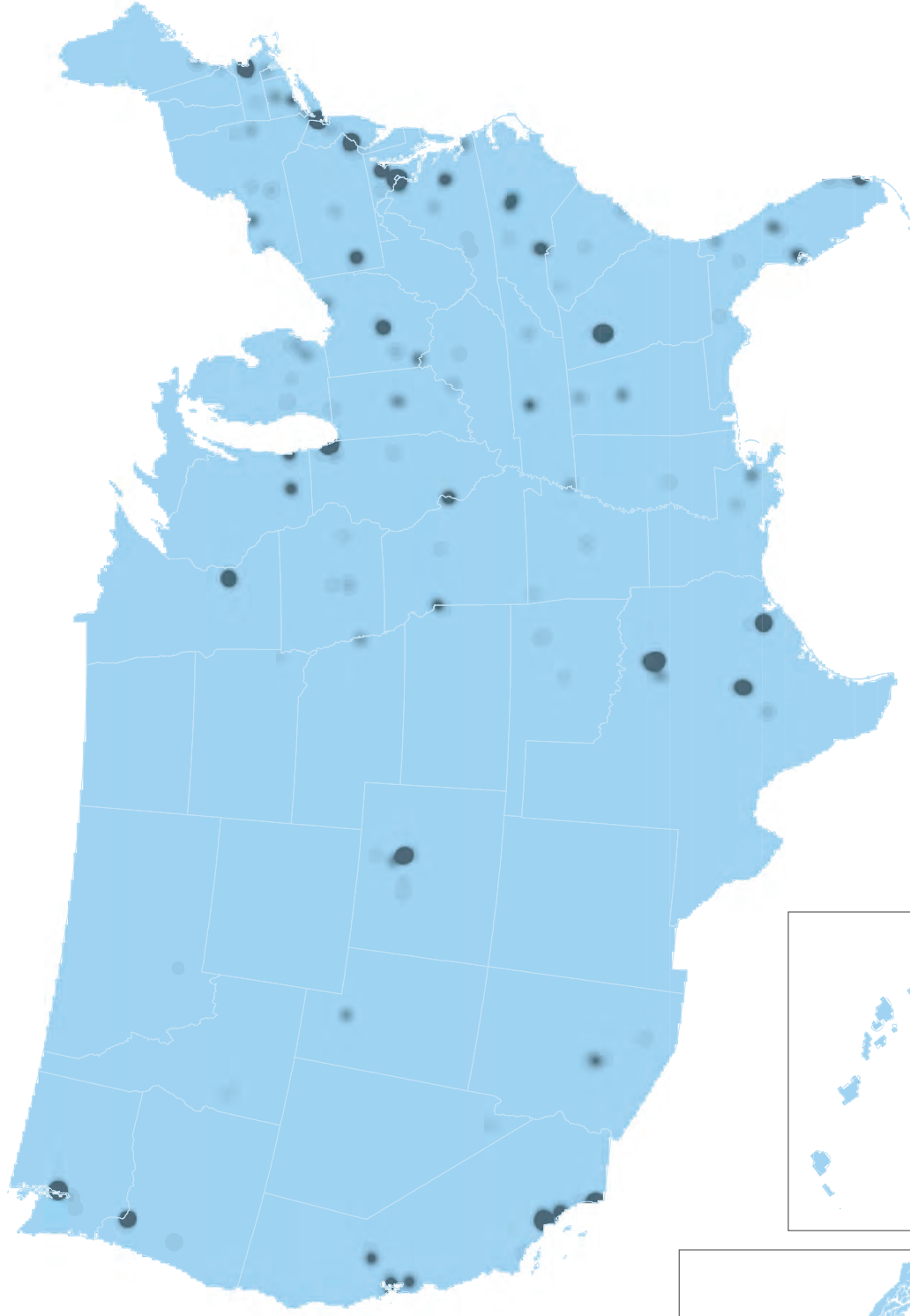
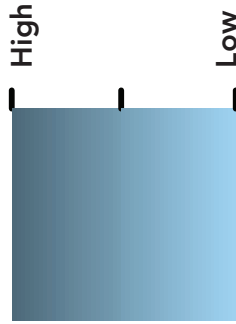
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





SEGMENT DENSITY

This map illustrates the density and distribution of the Metro Renters Tapestry Segment by households.



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LifeMode Group: Upscale Avenues

# Enterprising Professionals

2D

Households: 1,737,200

Average Household Size: 2.48

Median Age: 35.3

Median Household Income: \$86,600



## WHO ARE WE?

*Enterprising Professionals* residents are well educated and climbing the ladder in STEM (science, technology, engineering, and mathematics) occupations. They change jobs often and therefore choose to live in condos, town homes, or apartments; many still rent their homes. The market is fast-growing, located in lower density neighborhoods of large metro areas. *Enterprising Professionals* residents are diverse, with Asians making up over one-fifth of the population. This young market makes over one and a half times more income than the US median, supplementing their income with high-risk investments. At home, they enjoy the Internet and TV on high-speed connections with premier channels and services.

## OUR NEIGHBORHOOD

- Almost half of households are married couples, and 29% are single person households.
- Housing is a mixture of suburban single-family homes, row homes, and larger multiunit structures.
- Close to three quarters of the homes were built after 1980; 25% are newer, built after 2000.
- Renters make up nearly half of all households.

## SOCIOECONOMIC TRAITS

- Median household income one and a half times that of the US.
- Over half hold a bachelor's degree or higher.
- Early adopters of new technology in hopes of impressing peers with new gadgets.
- Enjoy talking about and giving advice on technology.
- Half have smartphones and use them for news, accessing search engines, and maps.
- Work long hours in front of a computer.
- Strive to stay youthful and healthy, eat organic and natural foods, run and do yoga.
- Buy name brands and trendy clothes online.



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





LifeMode Group: Upscale Avenues

# Enterprising Professionals

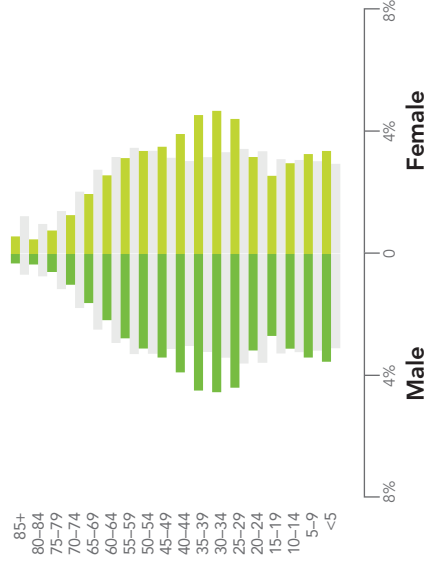


esri.com/tapestry

## AGE BY SEX (Esri data)

**Median Age: 35.3** US: 38.2

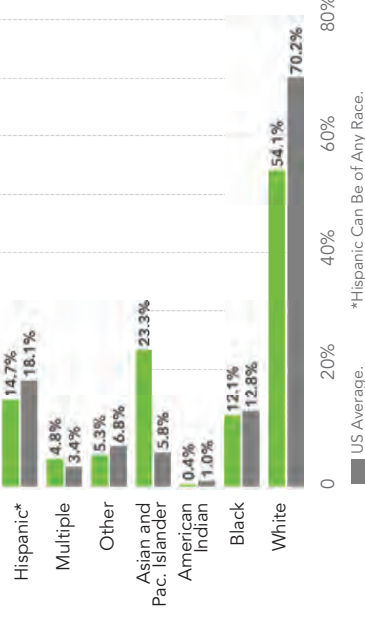
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## RACE AND ETHNICITY (Esri data)

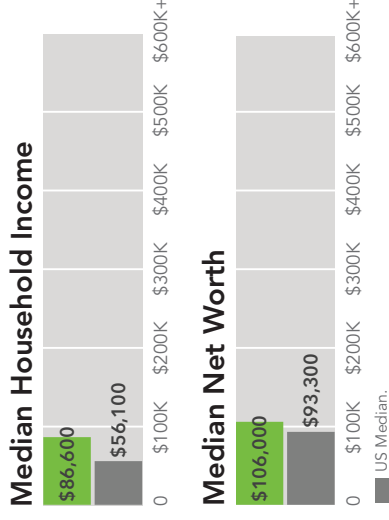
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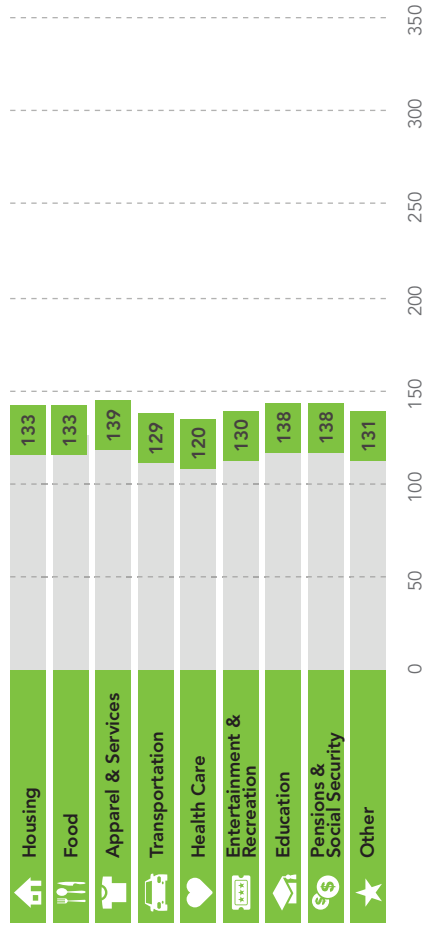
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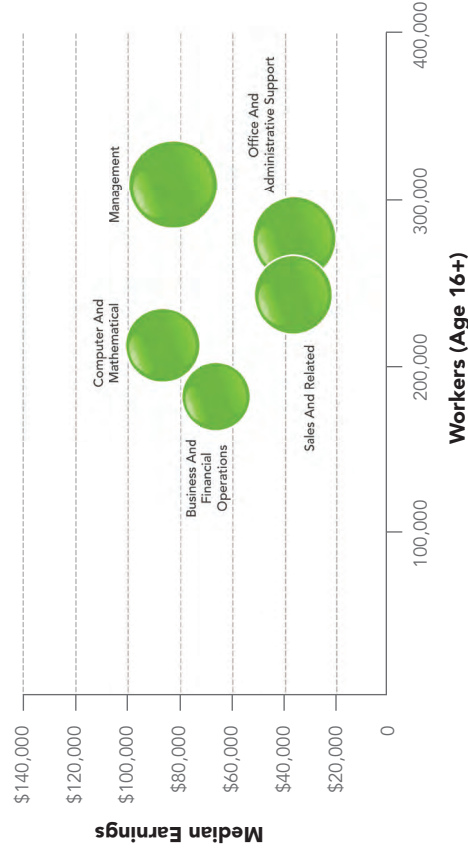
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## OCCUPATION BY EARNINGS

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.





LifeMode Group: Upscale Avenues

# Enterprising Professionals



**TAPESTRY**  
SEGMENTATION  
esri.com/tapestry

## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Buy digital books for tablet reading, along with magazines and newspapers.
- Frequent the dry cleaner.
- Travel to foreign and domestic destinations common.
- Watch movies and TV with video-on-demand and HDTV over a high-speed connection.
- Convenience is key—shop at Amazon.com and pick up drugs at the Target pharmacy.
- Eat out at The Cheesecake Factory, Chipotle Mexican, and Panera Bread; drop by Starbucks for coffee.
- Leisure activities include gambling, trips to museums and the beach.
- Have health insurance and a 401(k) through work.

## 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 Community Survey.



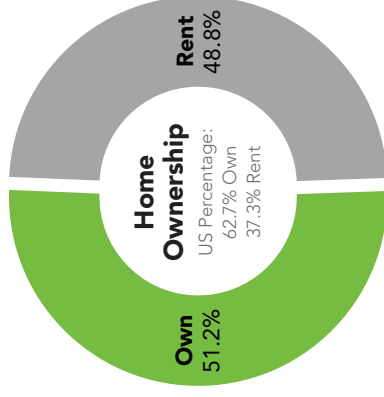
### Typical Housing:

Multifunits;  
Single Family

### Median Value:

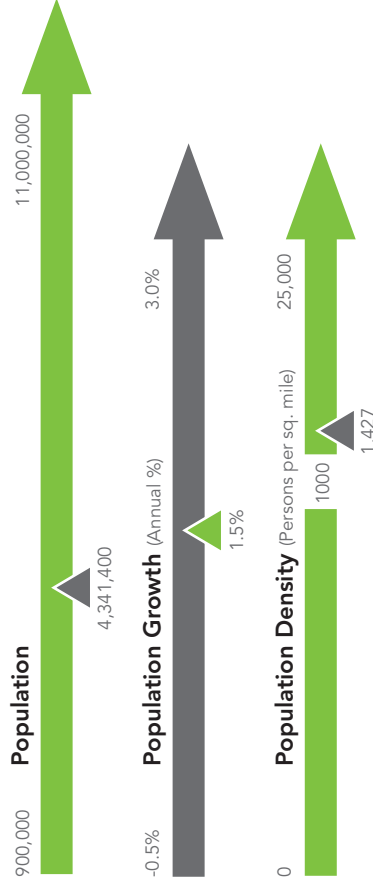
\$340,200

US Median: \$207,300



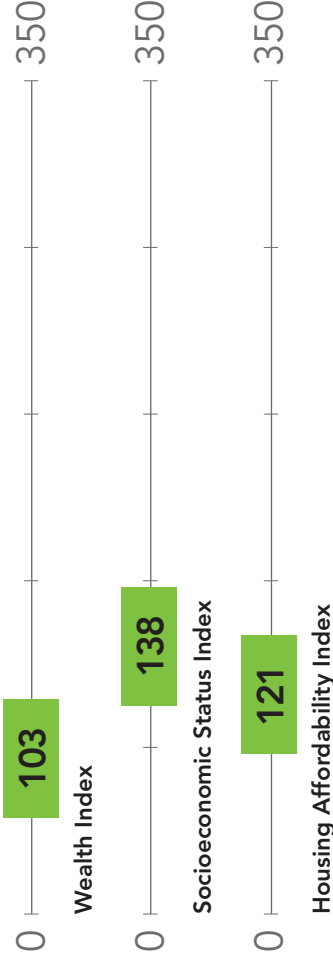
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LifeMode Group: Upscale Avenues

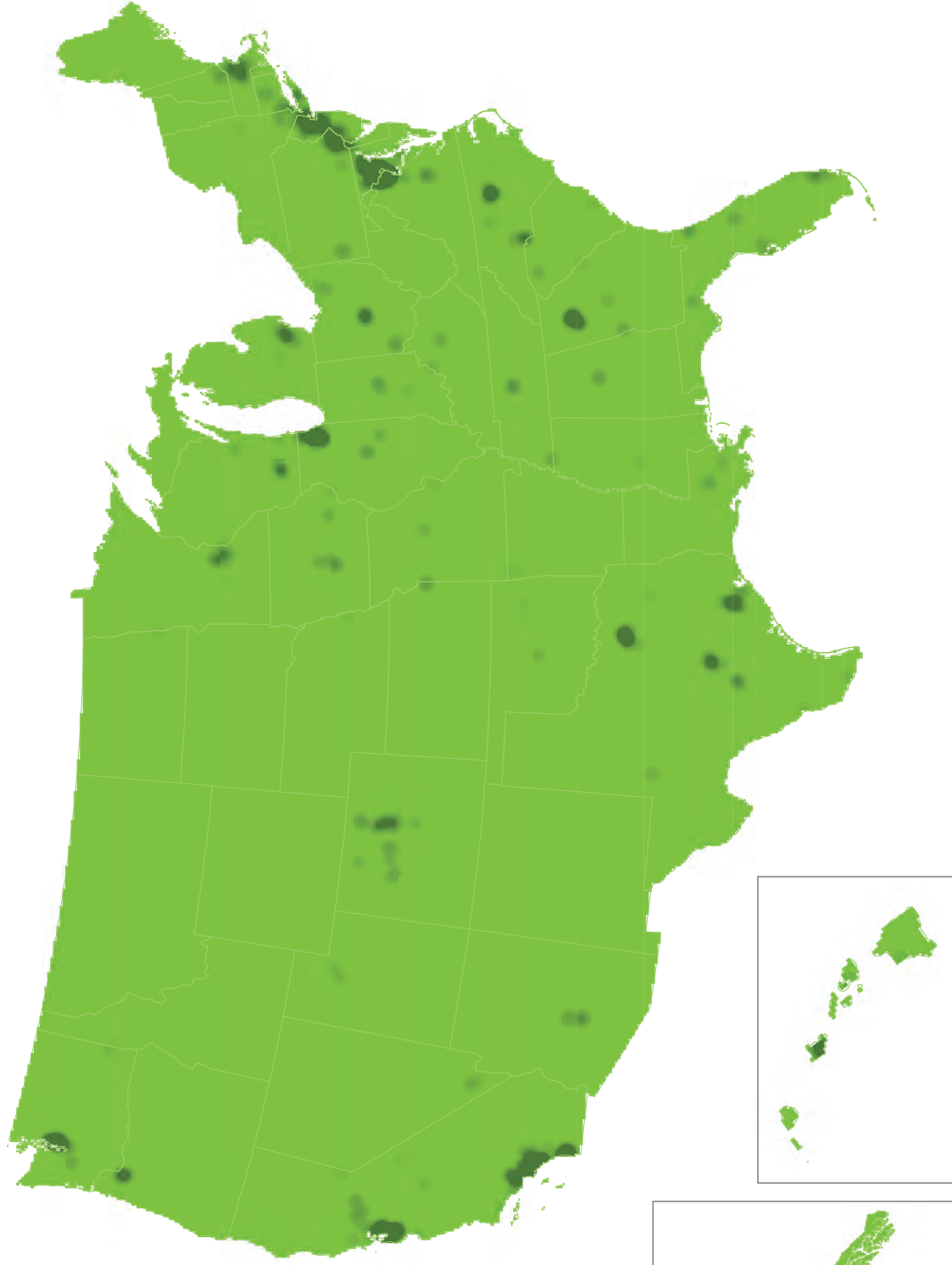
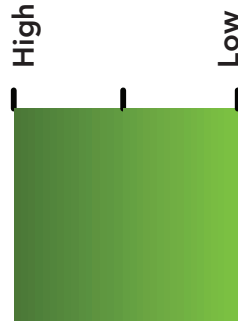
# Enterprising Professionals



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## SEGMENT DENSITY

This map illustrates the density and distribution of the *Enterprising Professionals* Tapestry Segment by households.



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LifeMode Group: Family Landscapes  
**Soccer Moms**

4A

**Households:** 3,541,300

**Average Household Size:** 2.97

**Median Age:** 37.0

**Median Household Income:** \$90,500

**WHO ARE WE?**

Soccer Moms is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.

**OUR NEIGHBORHOOD**

- Soccer Moms residents prefer the suburban periphery of metropolitan areas.
- Predominantly single family, homes are in newer neighborhoods, 34% built in the 1990s (Index 236), 31% built since 2000.
- Owner-occupied homes have high rate of mortgages at 68% (Index 164), and low rate vacancy at 4%.
- Median home value is \$257,400.
- Most households are married couples with children; average household size is 2.97.
- Most households have 2 or 3 vehicles; long travel time to work including a disproportionate number commuting from a different county (Index 132).

**SOCIOECONOMIC TRAITS**

- Education: 40.5% college graduates; more than 72% with some college education.
- Low unemployment at 3.8%; high labor force participation rate at 71%; 2 out of 3 households include 2+ workers (Index 124).
- Connected, with a host of wireless devices from iPods to tablets—anything that enables convenience, like banking, paying bills, or even shopping online.
- Well insured and invested in a range of funds, from savings accounts or bonds to stocks.
- Carry a higher level of debt, including first (Index 149) and second mortgages (Index 154) and auto loans (Index 149).



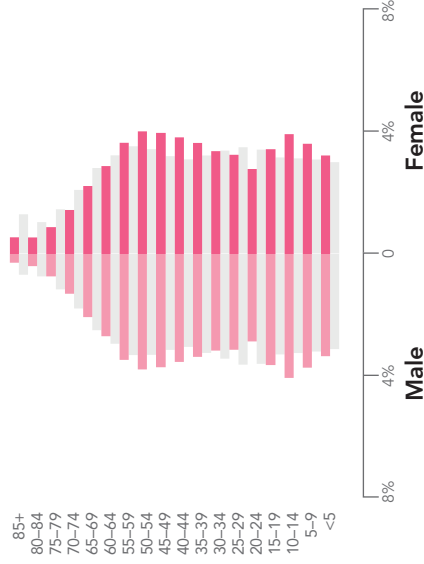
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



### AGE BY SEX (Esri data)

**Median Age: 37.0** US: 38.2

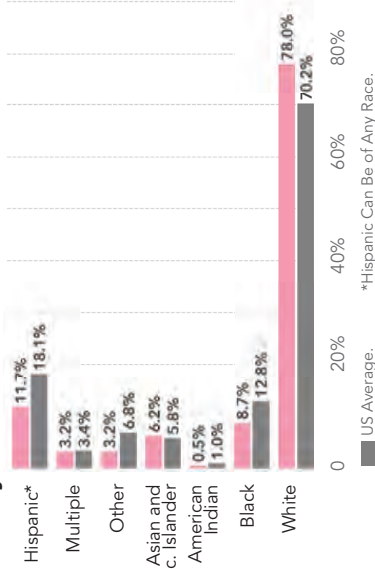
■ Indicates US



### RACE AND ETHNICITY (Esri data)

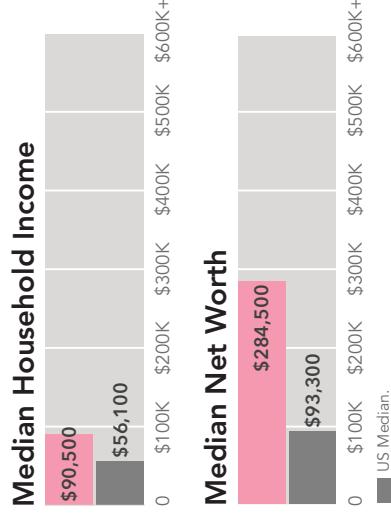
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 50.8** US: 64.0



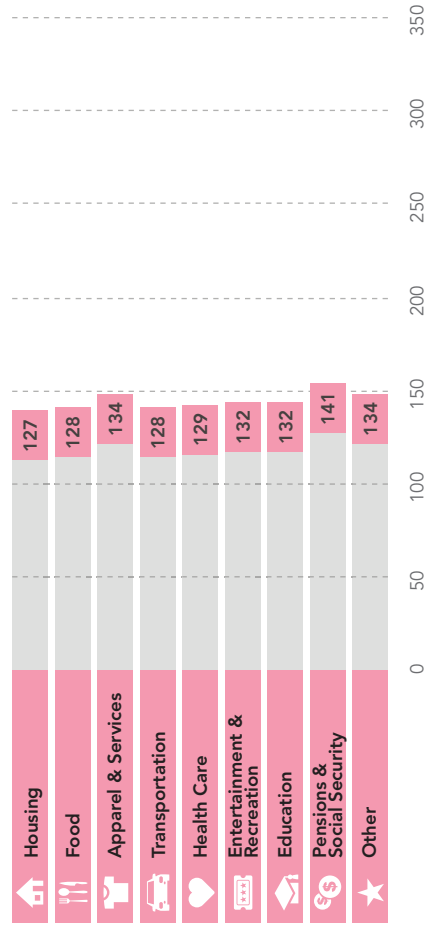
### INCOME AND NET WORTH

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.



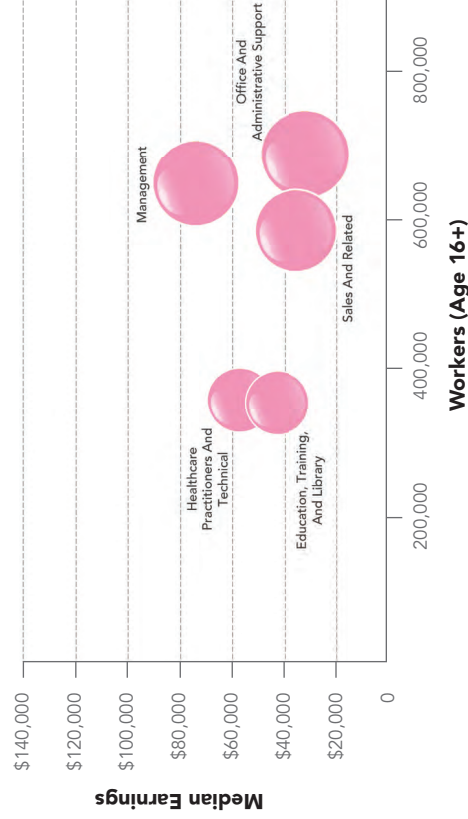
### AVERAGE HOUSEHOLD BUDGET INDEX

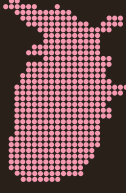
The index compares the average amount spent in this market's household budgets for housing, food, apparel, etc., to the average amount spent by all US households. An index of 100 is average. An index of 120 shows that average spending by consumers in this market is 20 percent above the national average.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



### OCCUPATION BY EARNINGS

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





## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Most households own at least 2 vehicles; the most popular types are minivans and SUVs.
- Family-oriented purchases and activities dominate, like 4+ televisions (Index 154), movie purchases or rentals, children's apparel and toys, and visits to theme parks or zoos.
- Outdoor activities and sports are characteristic of life in the suburban periphery. They attend sporting events, as well as participate in them like bicycling, jogging, golfing, and boating.
- Home maintenance services are frequently contracted, but these families also like their gardens and own the tools for minor upkeep, like lawn mowers, trimmers, and blowers.

## HOUSING

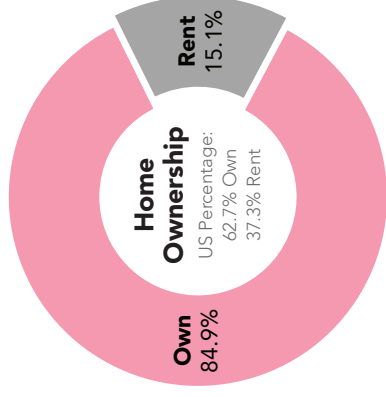
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
 Single Family

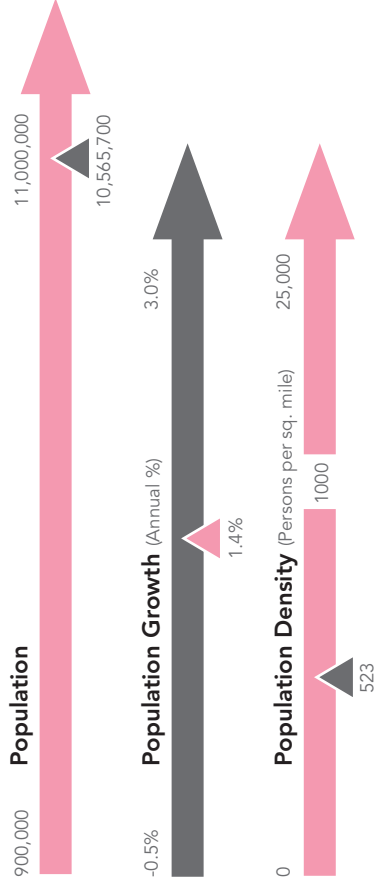
**Median Value:**  
 \$257,400

US Median: \$207,300



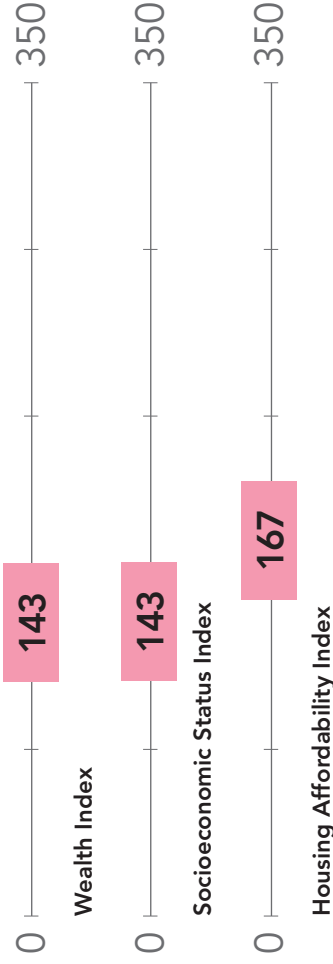
## POPULATION CHARACTERISTICS

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



## ESRI INDEXES

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





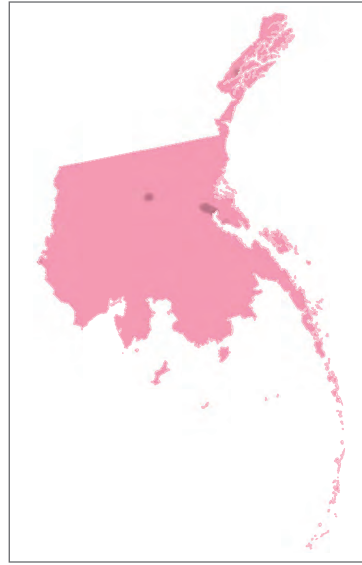
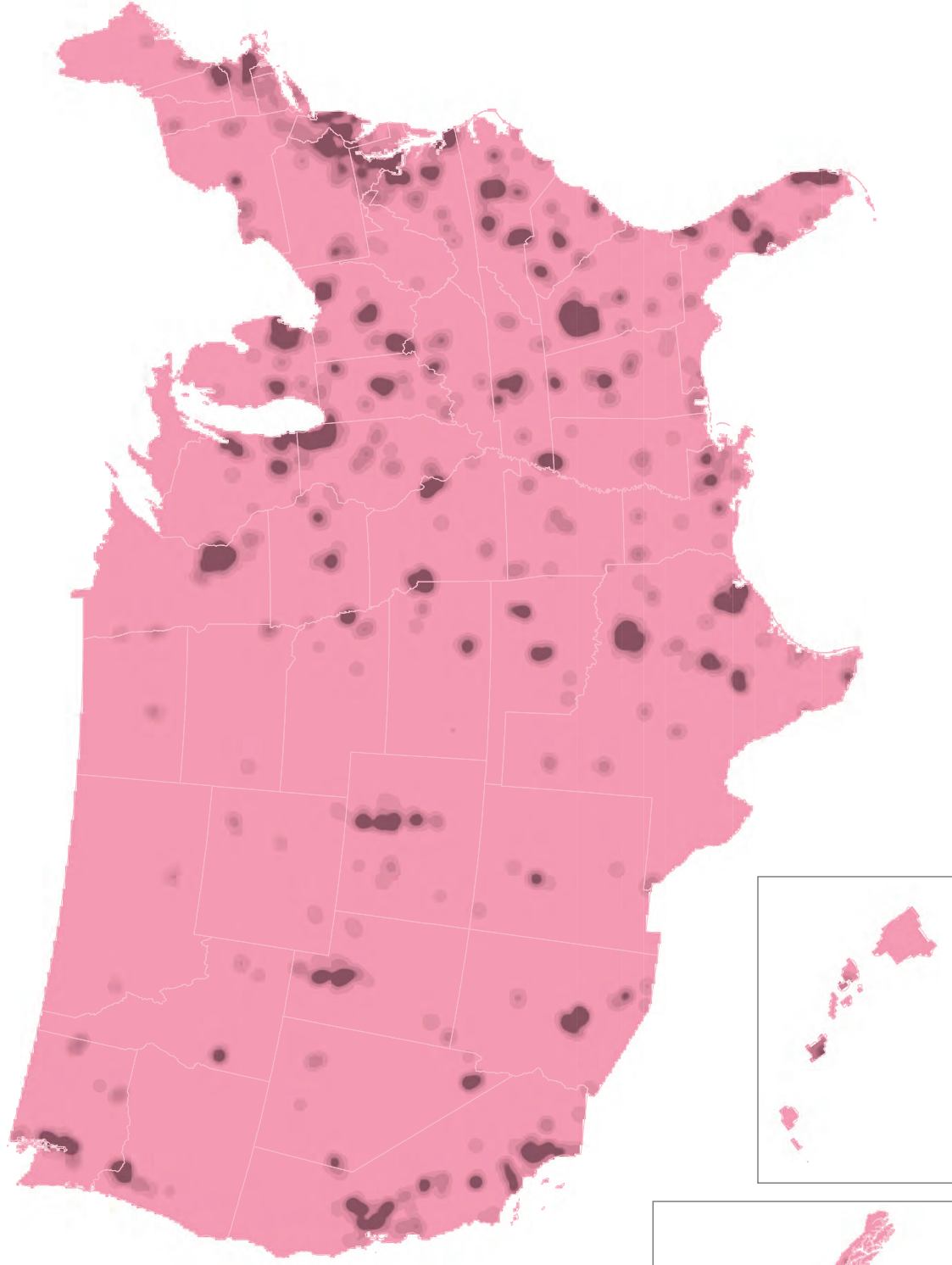
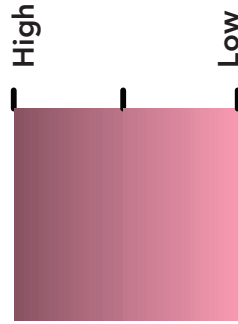


# LifeMode Group: Family Landscapes Soccer Moms



## SEGMENT DENSITY

This map illustrates the density and distribution of the Soccer Moms Tapestry Segment by households.



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info@esri.com  
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# esri

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LifeMode Group: Family Landscapes

# Middleburg

4C

Households: 3,511,200

Average Household Size: 2.75

Median Age: 36.1

Median Household Income: \$59,800



## WHO ARE WE?

Middleburg neighborhoods transformed from the easy pace of country living to semirural subdivisions in the last decade, when the housing boom reached out. Residents are conservative, family-oriented consumers. Still more country than rock and roll, they are thrifty but willing to carry some debt and are already investing in their futures. They rely on their smartphones and mobile devices to stay in touch and pride themselves on their expertise. They prefer to buy American and travel in the US. This market is younger but growing in size and assets.

## OUR NEIGHBORHOOD

- Semirural locales within metropolitan areas.
- Neighborhoods changed rapidly in the previous decade with the addition of new single-family homes.
- Include a number of mobile homes (Index 150).
- Affordable housing, median value of \$175,000 (Index 84) with a low vacancy rate.
- Young couples, many with children; average household size is 2.75.

## SOCIOECONOMIC TRAITS

- Education: 65% with a high school diploma or some college.
- Unemployment rate lower at 4.7% (Index 86).
- Labor force participation typical of a younger population at 66.7% (Index 107).
- Traditional values are the norm here—faith, country, and family.
- Prefer to buy American and for a good price.
- Comfortable with the latest in technology, for convenience (online banking or saving money on landlines) and entertainment.



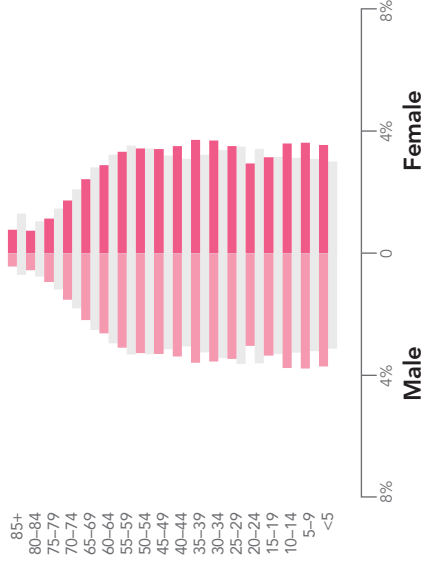
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



### AGE BY SEX (Esri data)

**Median Age: 36.1** US: 38.2

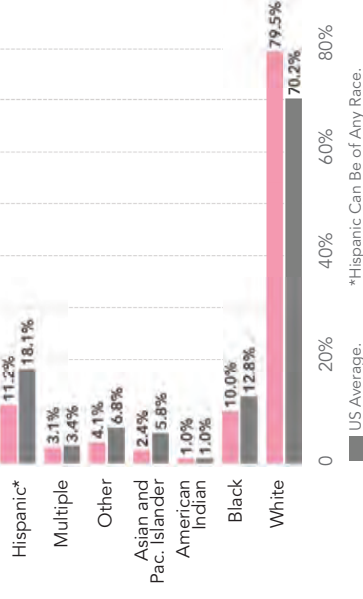
■ Indicates US



### RACE AND ETHNICITY (Esri data)

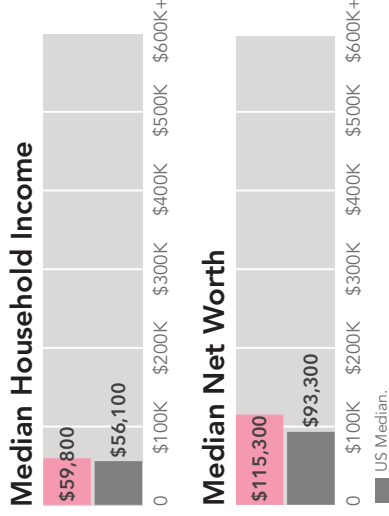
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 48.5** US: 64.0



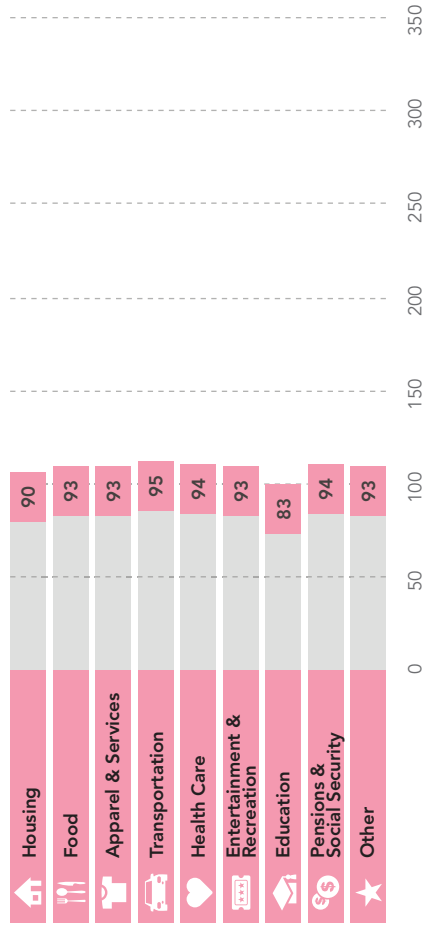
### INCOME AND NET WORTH

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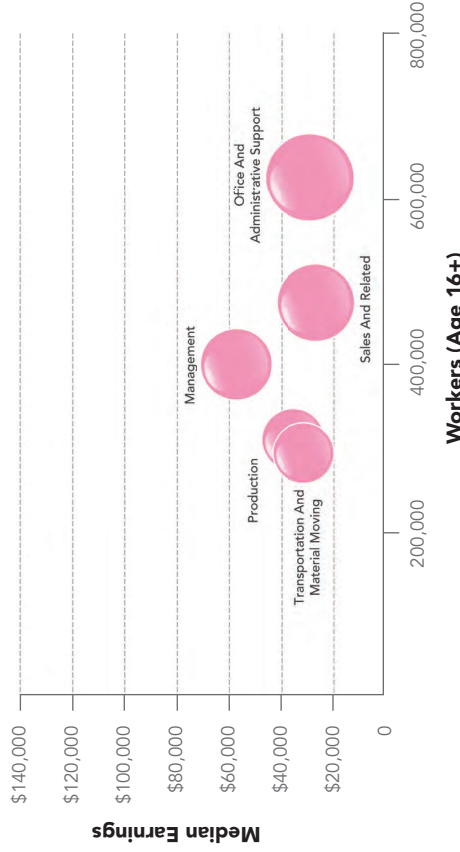
### AVERAGE HOUSEHOLD BUDGET INDEX

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



### OCCUPATION BY EARNINGS

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



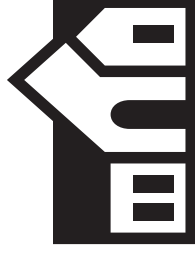
## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Residents are partial to domestic vehicles; they like to drive trucks, SUVs, or motorcycles.
- Entertainment is primarily family-oriented, TV and movie rentals or theme parks and family restaurants.
- Spending priorities also focus on family (children's toys and appareil) or home DIY projects.
- Sports include hunting, fishing, bowling, and baseball.
- TV and magazines provide entertainment and information.
- Media preferences include country and Christian channels.

## 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.



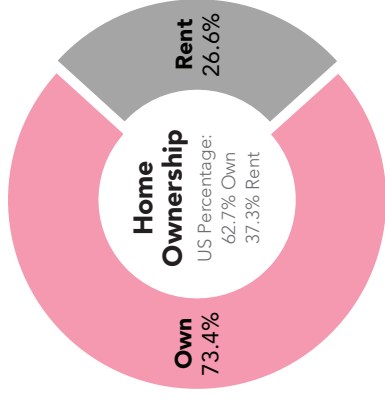
### Typical Housing:

Single Family

### Median Value:

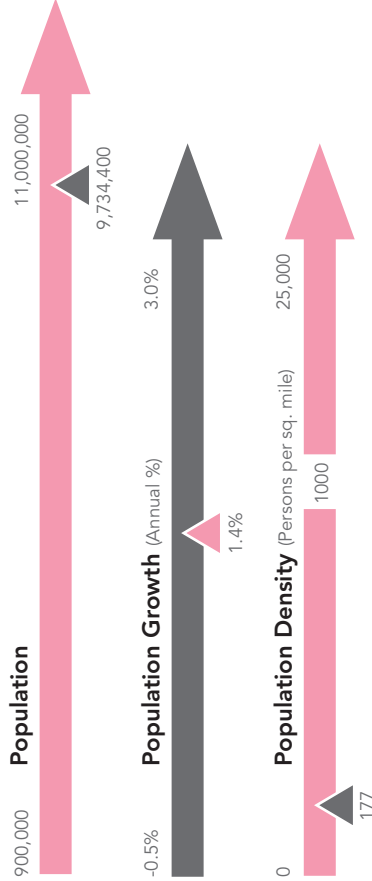
\$175,000

US Median: \$207,300



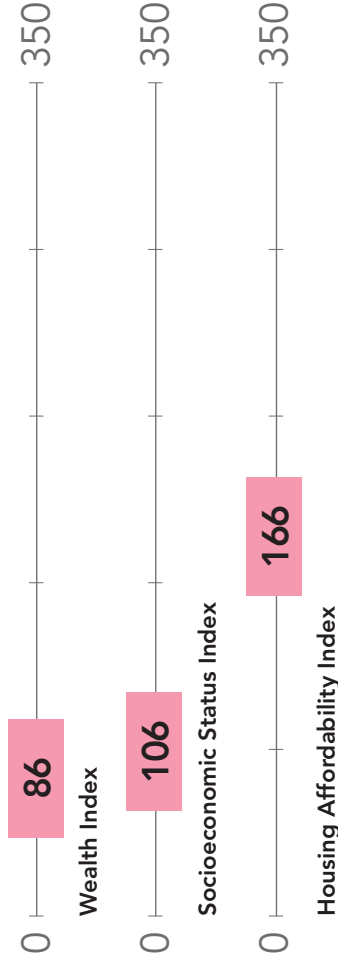
## POPULATION CHARACTERISTICS

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

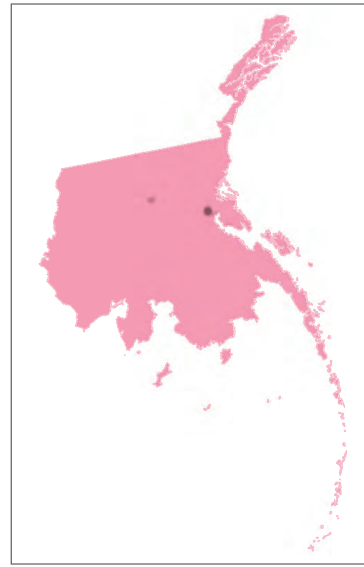
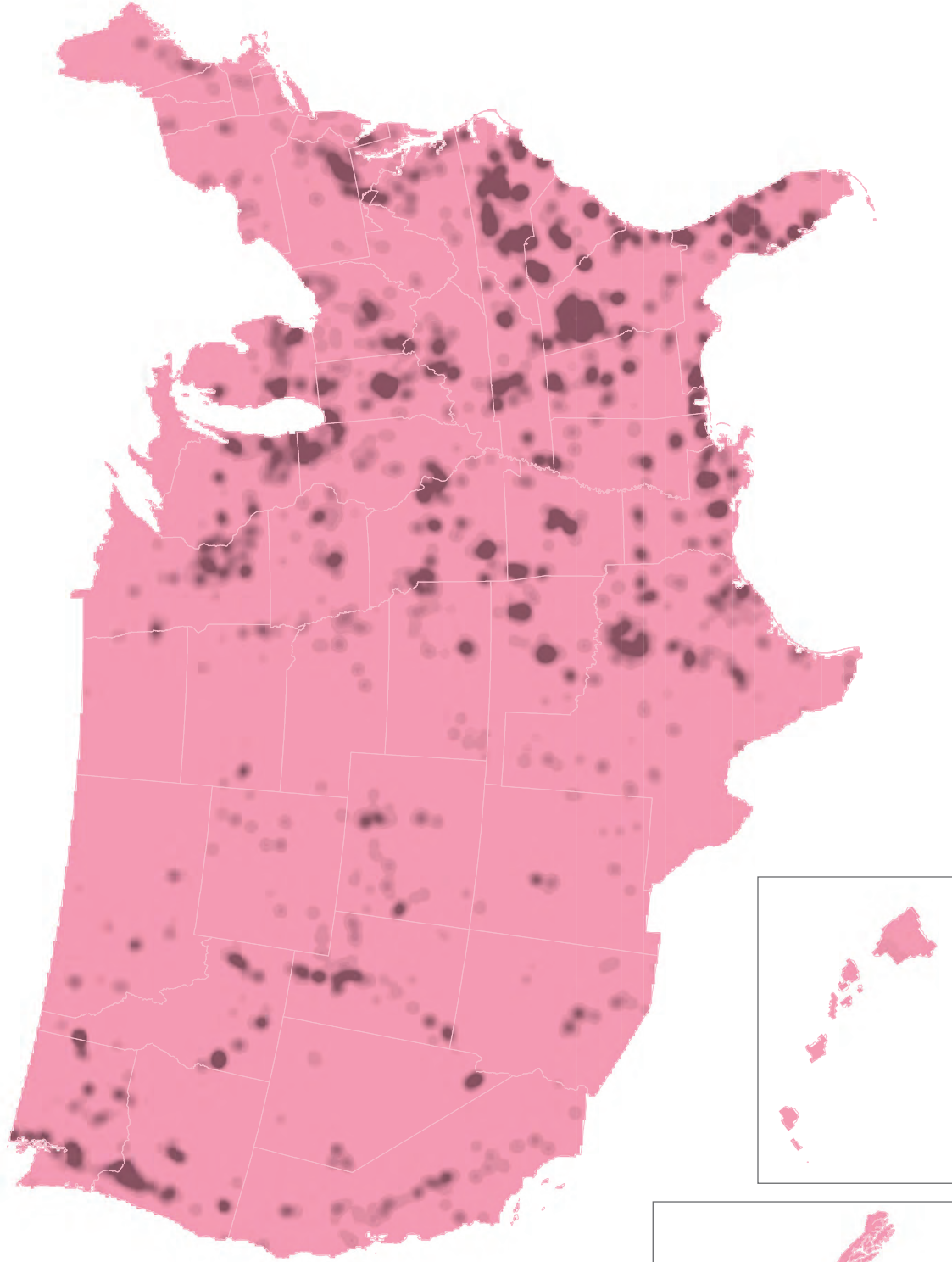
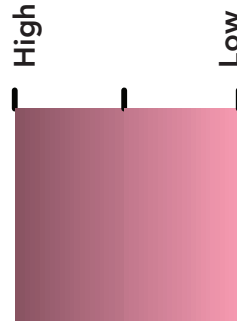
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





**SEGMENT DENSITY**

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



# Professional Pride

Households: 1,982,300

Average Household Size: 3.13

Median Age: 40.8

Median Household Income: \$138,100



## WHO ARE WE?

Professional Pride consumers are well-educated career professionals that have prospered through the Great Recession. To maintain their upscale suburban lifestyles, these goal oriented couples work, often commuting far and working long hours. However, their schedules are fine-tuned to meet the needs of their school age children. They are financially savvy; they invest wisely and benefit from interest and dividend income. So far, these established families have accumulated an average of 1.6 million dollars in net worth, and their annual household income runs at more than twice the US level. They take pride in their newer homes and spend valuable time and energy upgrading. Their homes are furnished with the latest in home trends, including finished basements equipped with home gyms and in-home theaters.

## OUR NEIGHBORHOOD

- Typically owner occupied (Index 146), single-family homes are in newer neighborhoods: 67% of units were built in the last 20 years.
- Neighborhoods are primarily located in the suburban periphery of large metropolitan areas.
- Most households own three or more vehicles; long commutes are the norm.
- Homes are valued at more than twice the US median home value, although three out of four homeowners have mortgages to pay off.
- Families are mostly married couples (almost 80% of households), and nearly half of these families have kids. Their average household size, 3.13, reflects the presence of children.

## SOCIOECONOMIC TRAITS

- Professional Pride consumers are highly qualified in the science, technology, law, or finance fields; they've worked hard to build their professional reputation or their start-up businesses.
- These consumers are willing to risk their accumulated wealth in the stock market.
- They have a preferred financial institution, regularly read financial news, and use the Internet for banking transactions.
- These residents are goal oriented and strive for lifelong earning and learning.
- Life here is well organized; routine is a key ingredient to daily life.

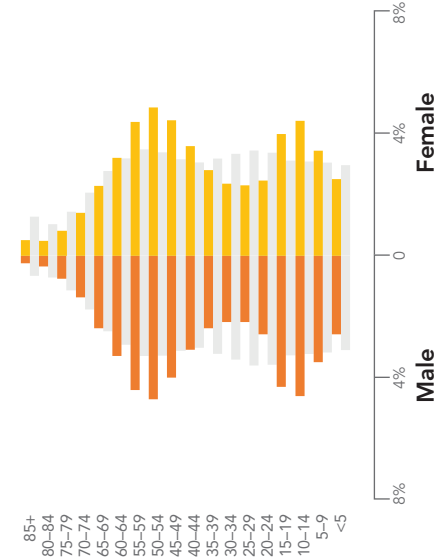


Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



### AGE BY SEX (Esri data)

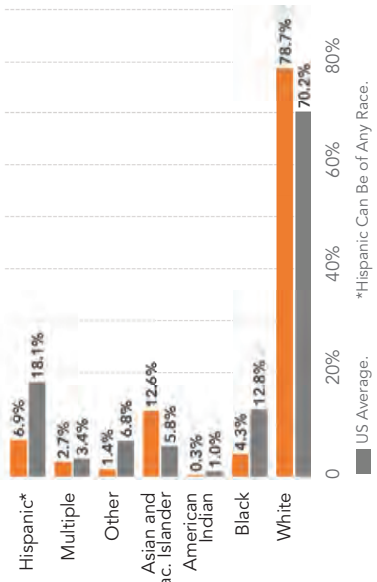
**Median Age: 40.8** US: 38.2  
 ■ Indicates US



### RACE AND ETHNICITY (Esri data)

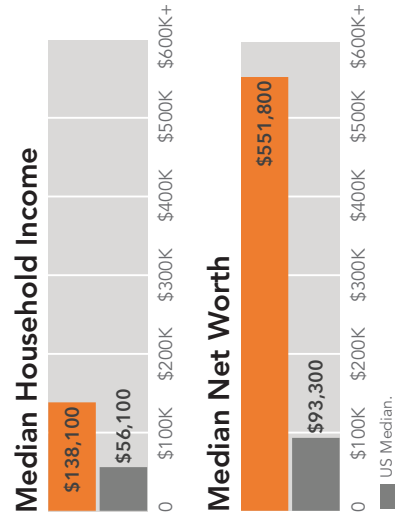
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 44.5** US: 64.0



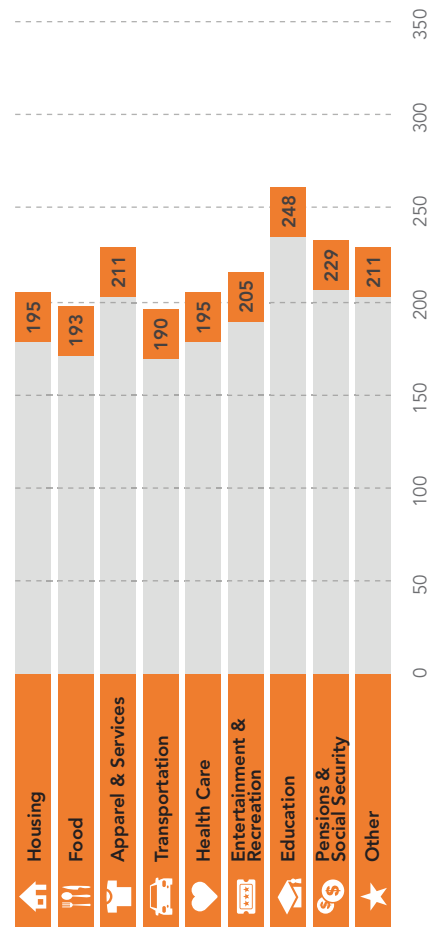
### INCOME AND NET WORTH

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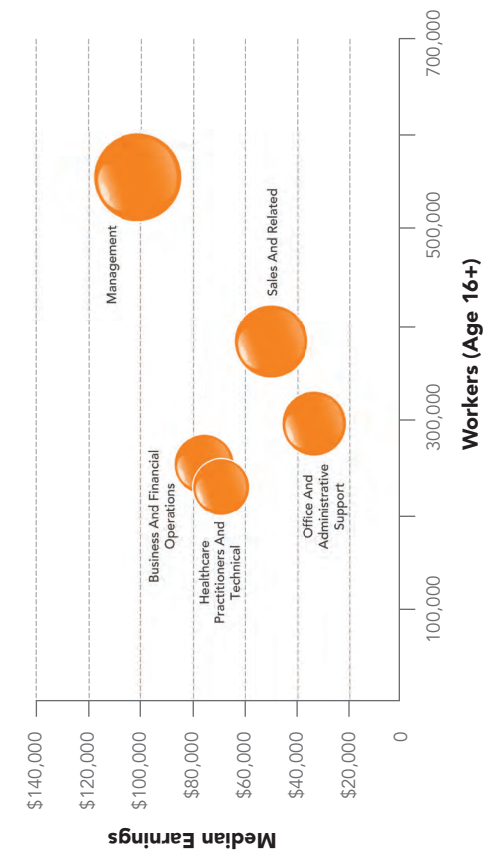
### AVERAGE HOUSEHOLD BUDGET INDEX

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### OCCUPATION BY EARNINGS

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



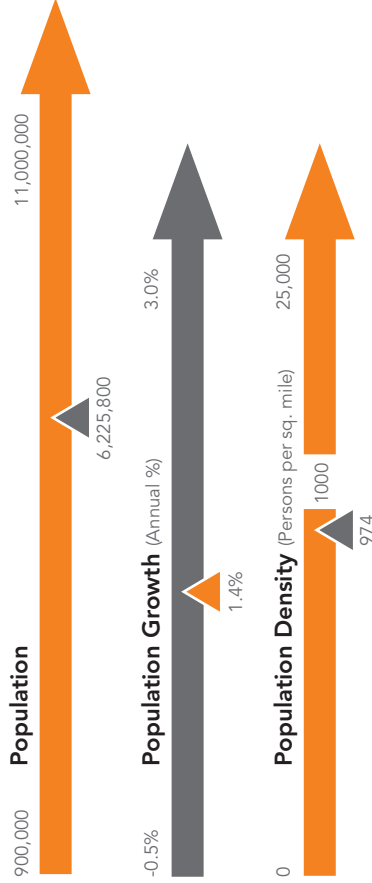
**MARKET PROFILE**

(Consumer preferences are estimated from data by GfK MRI)

- These frequent travelers take several domestic trips a year, preferring to book their plane tickets, accommodations, and rental cars via the Internet.
- Residents take pride in their picture-perfect homes, which they continually upgrade. They shop at Home Depot and Bed Bath & Beyond to tackle the smaller home improvement and remodeling tasks but contract out the larger projects.
- To keep up with their busy households, they hire housekeepers or professional cleaners.
- Residents are prepared for the ups and downs in life; they maintain life insurance; homeowners and auto insurance; as well as medical, vision, dental, and prescription insurance through work. They are actively investing for the future; they hold 401(k) and IRA retirement plans, plus securities.
- Consumers spend on credit but have the disposable income to avoid a balance on their credit cards. They spend heavily on Internet shopping; Amazon.com is a favorite website.
- Consumers find time in their busy schedules for themselves. They work out in their home gyms, owning at least a treadmill, an elliptical, or weightlifting equipment. They also visit the salon and spa regularly.
- All family members are avid readers; they read on their smartphones, tablets, and e-readers but also read hard copies of epicurean, home service, and sports magazines.
- Residents, both young and old, are tech savvy; they not only own the latest and greatest in tablets, smartphones, and laptops but actually use the features each has to offer.

**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.



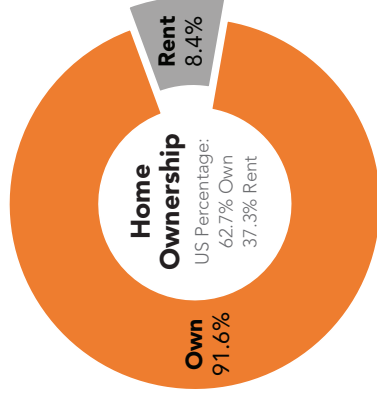
**HOUSING**

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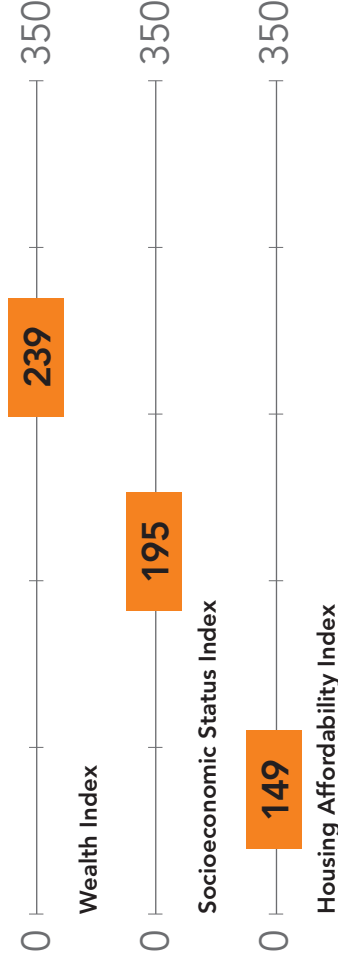
**Typical Housing:**  
 Single Family

**Median Value:**  
 \$433,400  
 US Median: \$207,300



**ESRI INDEXES**

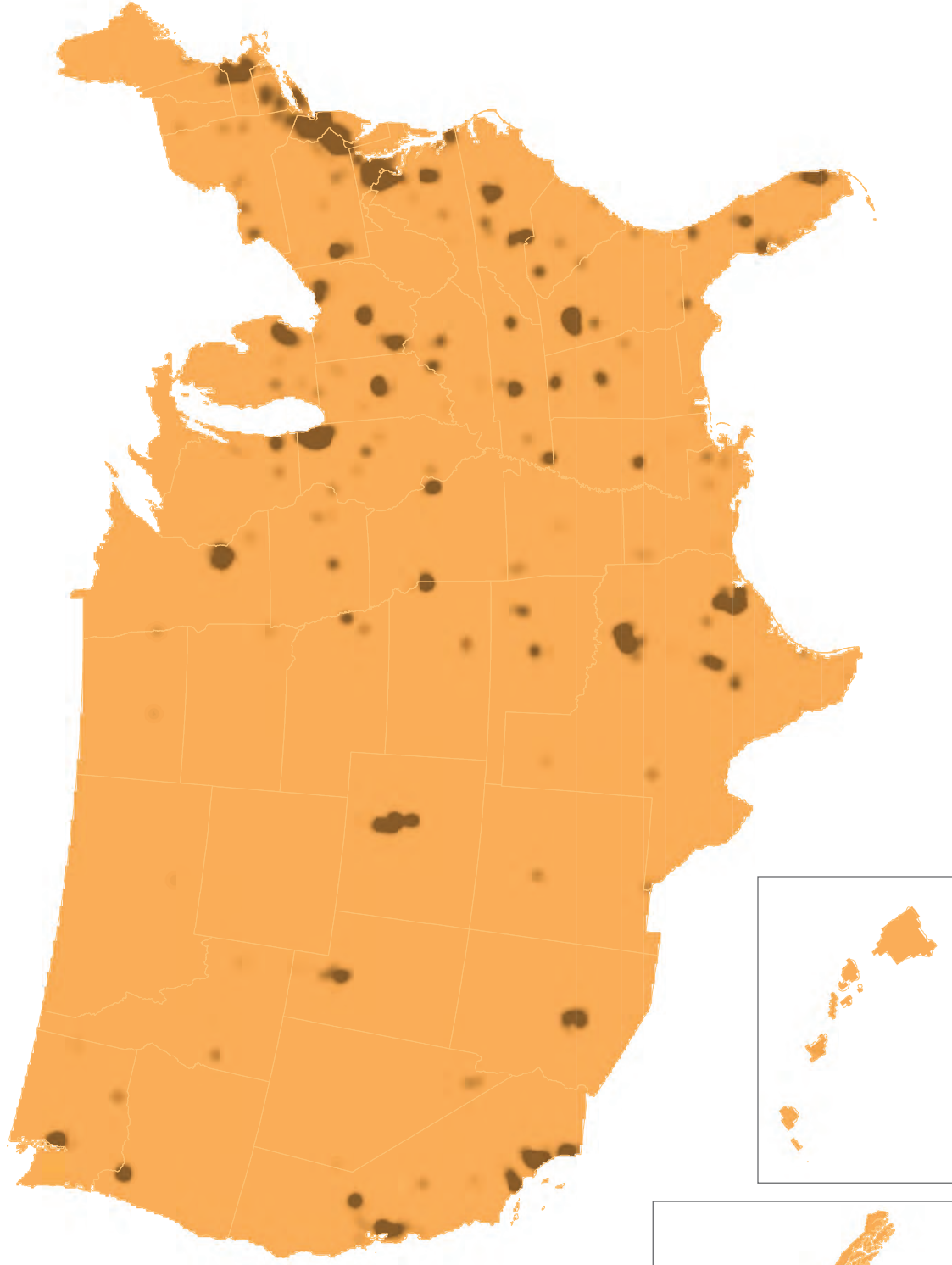
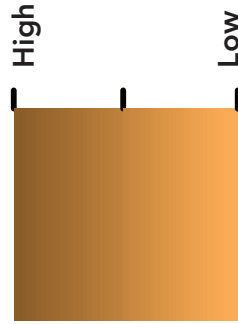
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.





## SEGMENT DENSITY

This map illustrates the density and distribution of the *Professional Pride* Tapestry Segment by households.



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LifeMode Group: Midtown Singles

# Young and Restless

11B

Households: 2,131,500

Average Household Size: 2.04

Median Age: 29.8

Median Household Income: \$40,500

## WHO ARE WE?

Gen Y comes of age: Well-educated young workers, some of whom are still completing their education, are employed in professional/technical occupations, as well as sales and office/administrative support roles. These residents are not established yet, but striving to get ahead and improve themselves. This market ranks in the top 5 for renters, movers, college enrollment, and labor force participation rate. Almost 1 in 5 residents move each year. More than half of all householders are under the age of 35, the majority living alone or in shared nonfamily dwellings. Median household income is still below the US. Smartphones are a way of life, and they use the Internet extensively. *Young and Restless* consumers are diverse, favoring densely populated neighborhoods in large metropolitan areas; over 50% are located in the South (almost a fifth in Texas), with the rest chiefly in the West and Midwest.

## OUR NEIGHBORHOOD

- One of the youngest markets: More than half the householders under age 35; median age 29.8.
- Primarily single-person households (Index 163) with some shared households (Index 201).
- Highly mobile market, beginning careers and changing addresses frequently.
- Naturally, one of the top 5 renter markets (Index 233).
- Apartment rentals popular: 44% in 5–19 unit buildings (Index 487), 27% in 20+ unit buildings (Index 318).
- Majority of housing built in 1970 or later (84%).

## SOCIOECONOMIC TRAITS

- Education completed: More than 2 out of 3 have some college, an associate's degree, or a bachelor's degree or higher. Almost 14% are still enrolled in college (Index 175).
- Labor force participation rate is exceptionally high at 75.0%; unemployment is low at 5.2%.
- These are careful shoppers, aware of prices, and demonstrate little brand loyalty.
- They like to be the first to try new products, but prefer to do research before buying the latest electronics.
- Most of their information comes from the Internet and TV, rather than traditional media.
- Carry their cell phone everywhere they go.



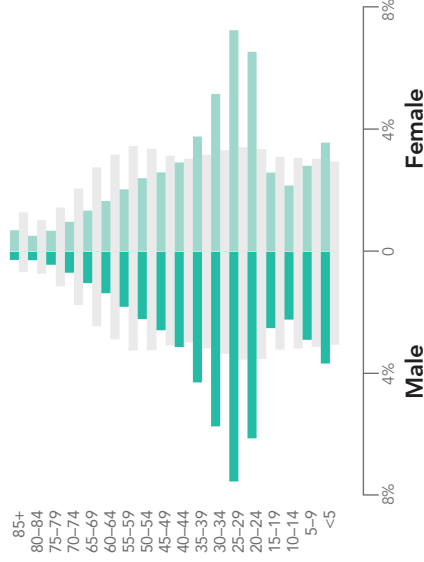
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



## AGE BY SEX (Esri data)

**Median Age: 29.8** US: 38.2

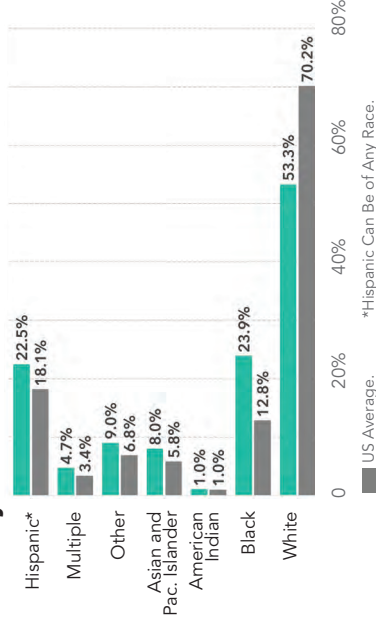
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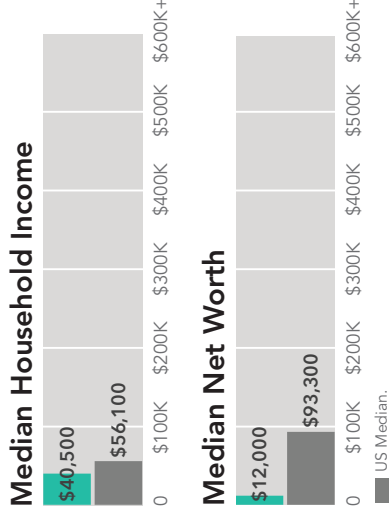
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**Diversity Index: 77.4** US: 64.0



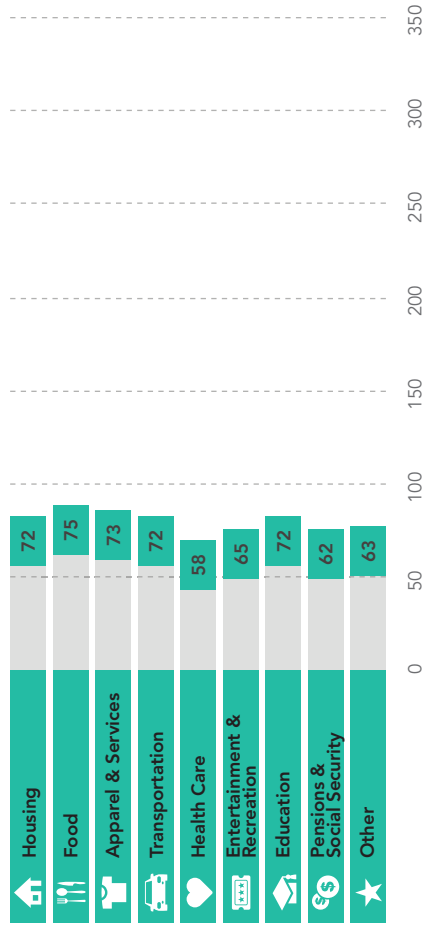
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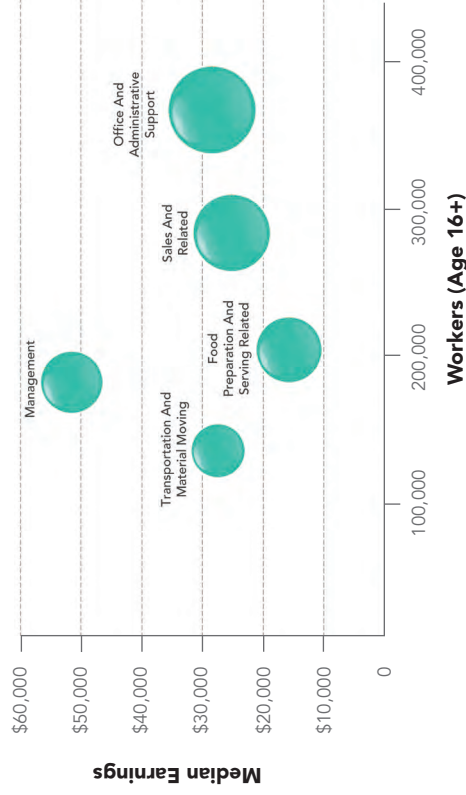
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## OCCUPATION BY EARNINGS

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



## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- No landline telephone for majority of HHs, preferring a cell phone only.
- Use their cell phone to text, listen to music, pay bills, redeem coupons, look up directions, and access financial information.
- Online activities include banking (with paperless statements), purchasing items on eBay, accessing Twitter and Facebook, and watching movies and TV shows.
- Enjoy dancing, playing pool, watching VH1 and Comedy Central programs, and playing basketball and ping pong.
- Listen to contemporary hits, jazz, rap, hip hop, and dance music.
- Purchase natural/organic food, but frequent fast food restaurants.
- Residents like to read magazines, especially digital, covering topics ranging from news, fashion, to music.

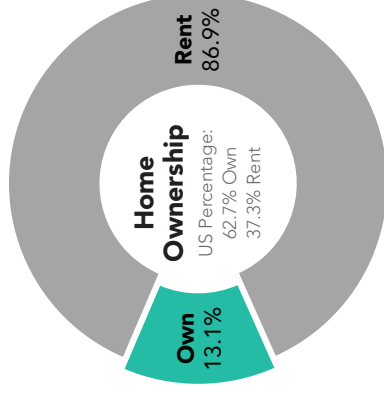
## HOUSING

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.



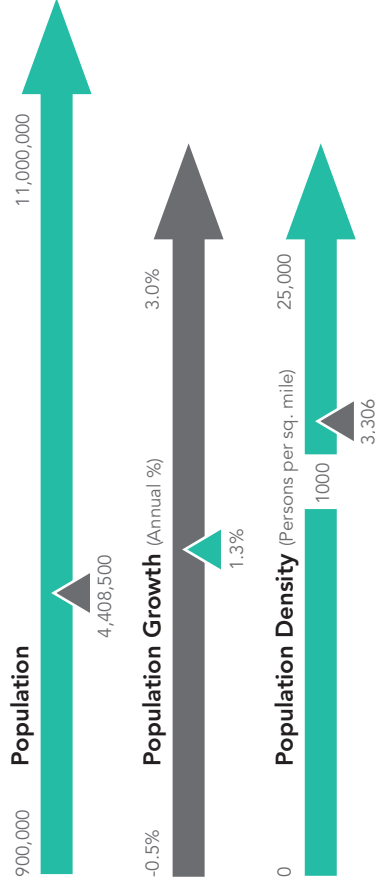
**Typical Housing:**  
 Multi-Unit Rentals

**Average Rent:**  
 \$958  
 US Average: \$1,038



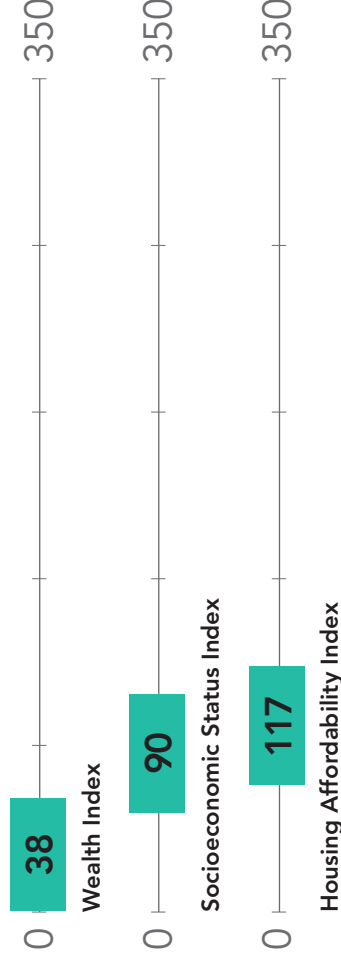
## POPULATION CHARACTERISTICS

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.





11B

LifeMode Group: Midtown Singles

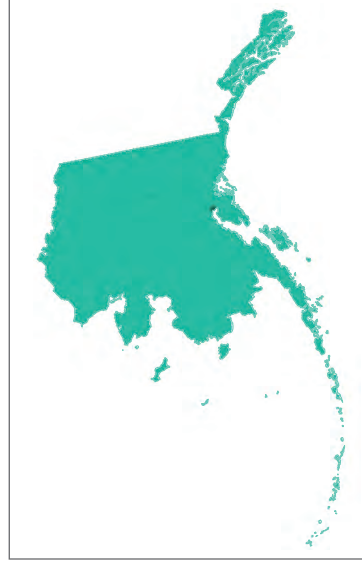
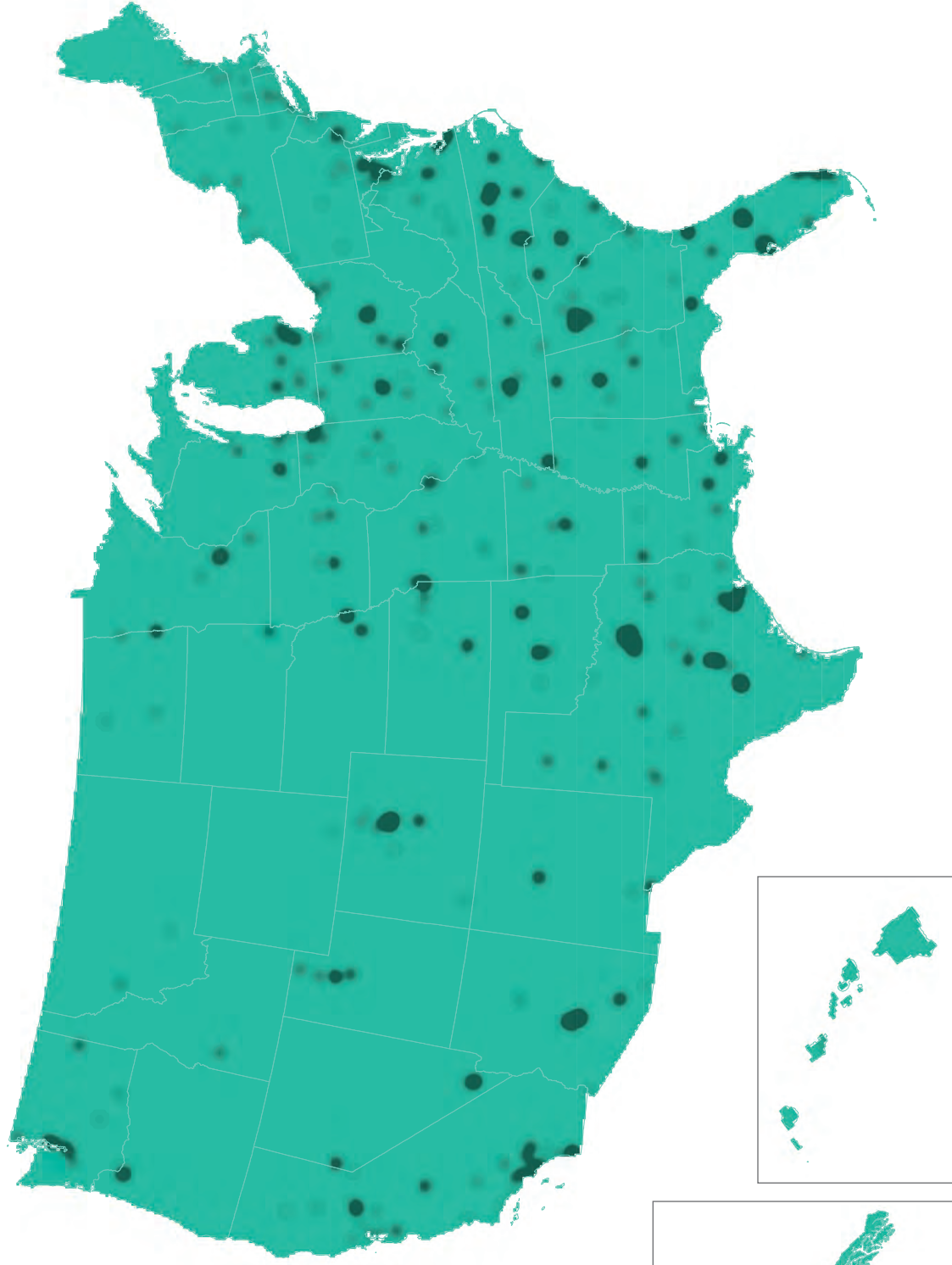
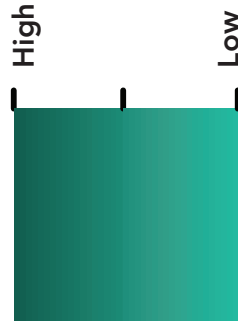
# Young and Restless

TAPESTRY  
SEGMENTATION  
esri.com/tapestry



## SEGMENT DENSITY

This map illustrates the density and distribution of the *Young and Restless* Tapestry Segment by households.



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# Bright Young Professionals

Households: 2,750,200

Average Household Size: 2.41

Median Age: 33.0

Median Household Income: \$54,000



## WHO ARE WE?

*Bright Young Professionals* is a large market, primarily located in urban outskirts of large metropolitan areas. These communities are home to young, educated, working professionals. More than one out of three householders is under the age of 35. Slightly more diverse couples dominate this market, with more renters than homeowners. More than two-fifths of the households live in single-family homes; over a third live in 5+ unit buildings. Labor force participation is high, generally white-collar work, with a mix of food service and part-time jobs (among the college students). Median household income, median home value, and average rent are close to the US values. Residents of this segment are physically active and up on the latest technology.

## OUR NEIGHBORHOOD

- Approximately 57% of the households rent; 43% own their homes.
- Household type is primarily couples, married (or unmarried), with above average concentrations of both single-parent (Index 125) and single-person (Index 115) households.
- Multiunit buildings or row housing make up 56% of the housing stock (row housing (Index 178), buildings with 5–19 units (Index 275)); 43% built 1980–99.
- Average rent mirrors the US (Index 100).
- Lower vacancy rate is at 8.2%.

## SOCIOECONOMIC TRAITS

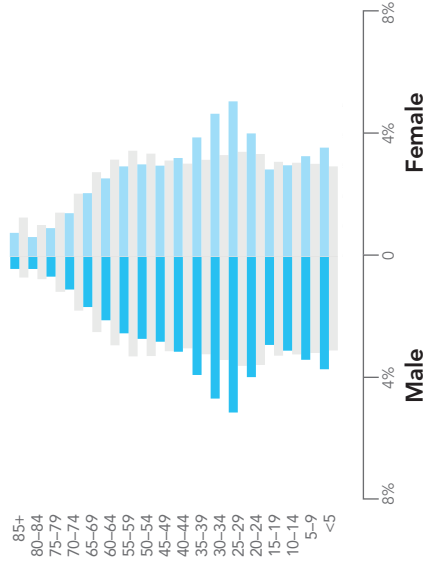
- Education completed: 35% with some college or an associate's degree, 33% with a bachelor's degree or higher.
- Unemployment rate is lower at 4.7%, and labor force participation rate of 72% is higher than the US rate.
- These consumers are up on the latest technology.
- They get most of their information from the Internet.
- Concern about the environment, impacts their purchasing decisions.



## AGE BY SEX (Esri data)

**Median Age: 33.0** US: 38.2

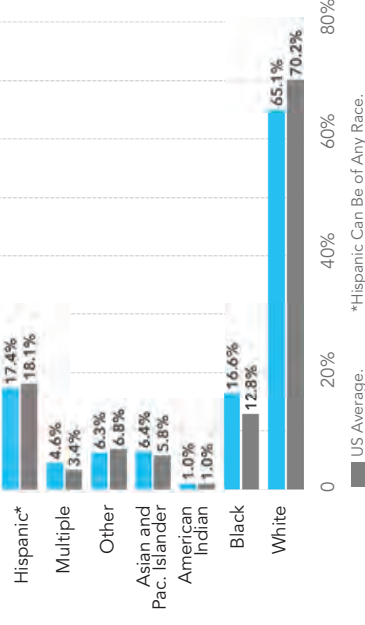
■ Indicates US



## 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).

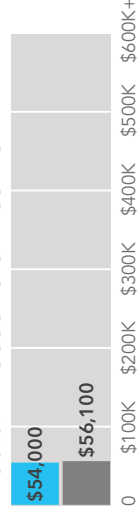
**Diversity Index: 67.5** US: 64.0



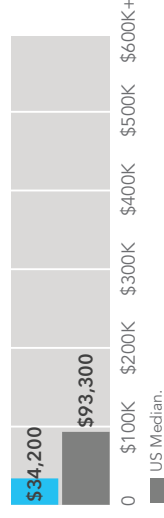
## INCOME AND NET WORTH

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

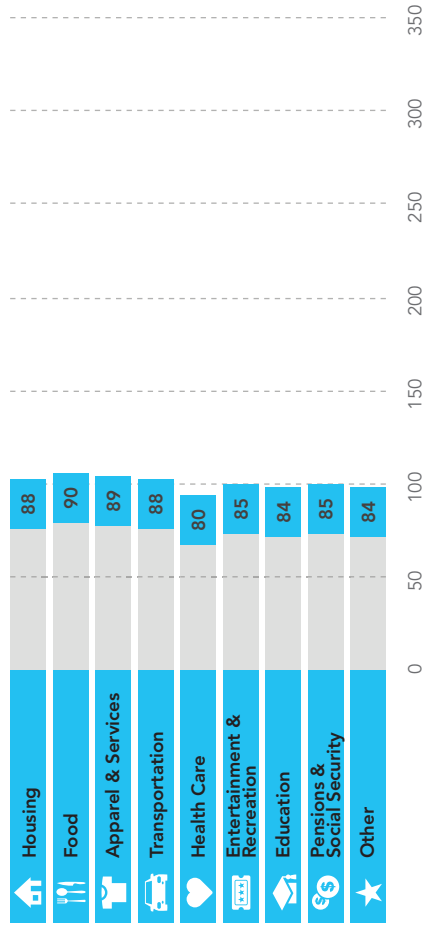


### Median Net Worth



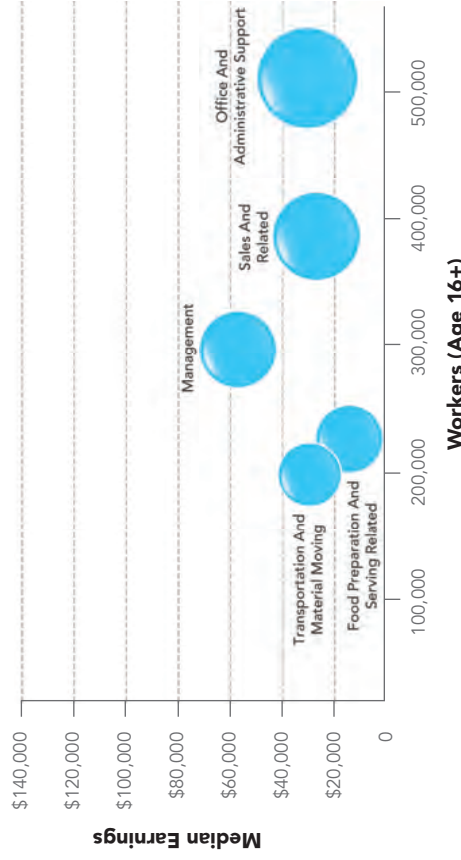
## AVERAGE HOUSEHOLD BUDGET INDEX

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 GfK MRI)

- Own retirement savings and student loans.
- Own newer computers (desktop, laptop, or both), iPods, and 2+ TVs.
- Go online and use mobile devices for banking, access YouTube or Facebook, visit blogs, download movies, and play games.
- Use cell phones to text, redeem mobile coupons, listen to music, and check for news and financial information.
- Find leisure going to bars/clubs, attending concerts, going to the beach, and renting DVDs from Redbox or Netflix.
- Enjoy a variety of sports, including backpacking, rock climbing, football, Pilates, running, and yoga.
- Eat out often at fast-food and family restaurants.

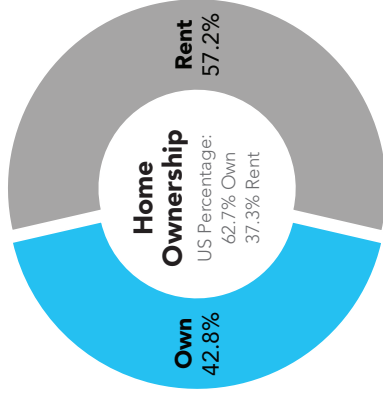
## HOUSING

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.



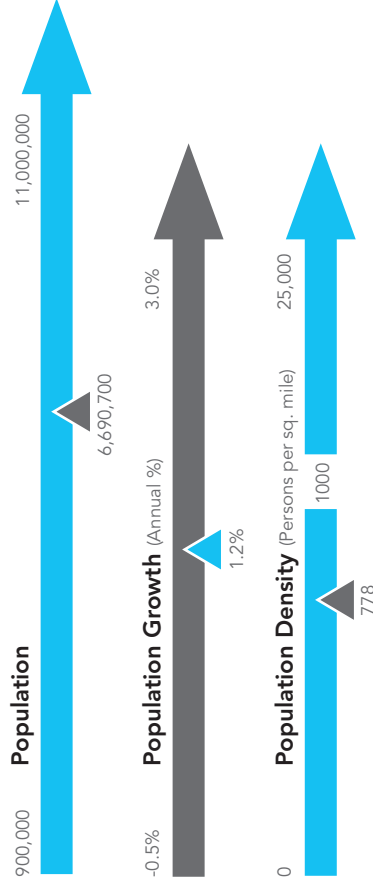
**Typical Housing:**  
Single Family;  
Multi-Units

**Average Rent:**  
\$1,042  
US Average: \$1,038



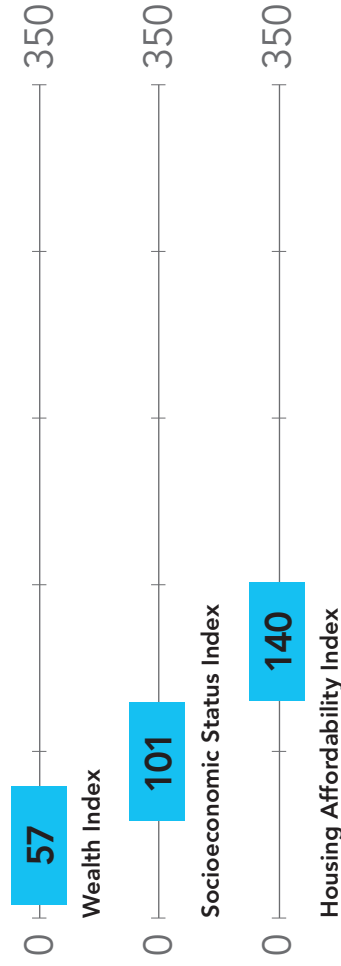
## POPULATION CHARACTERISTICS

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.

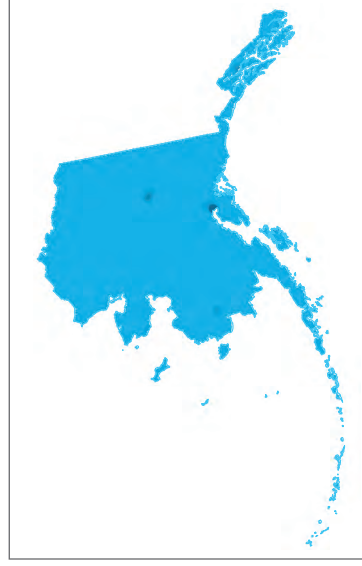
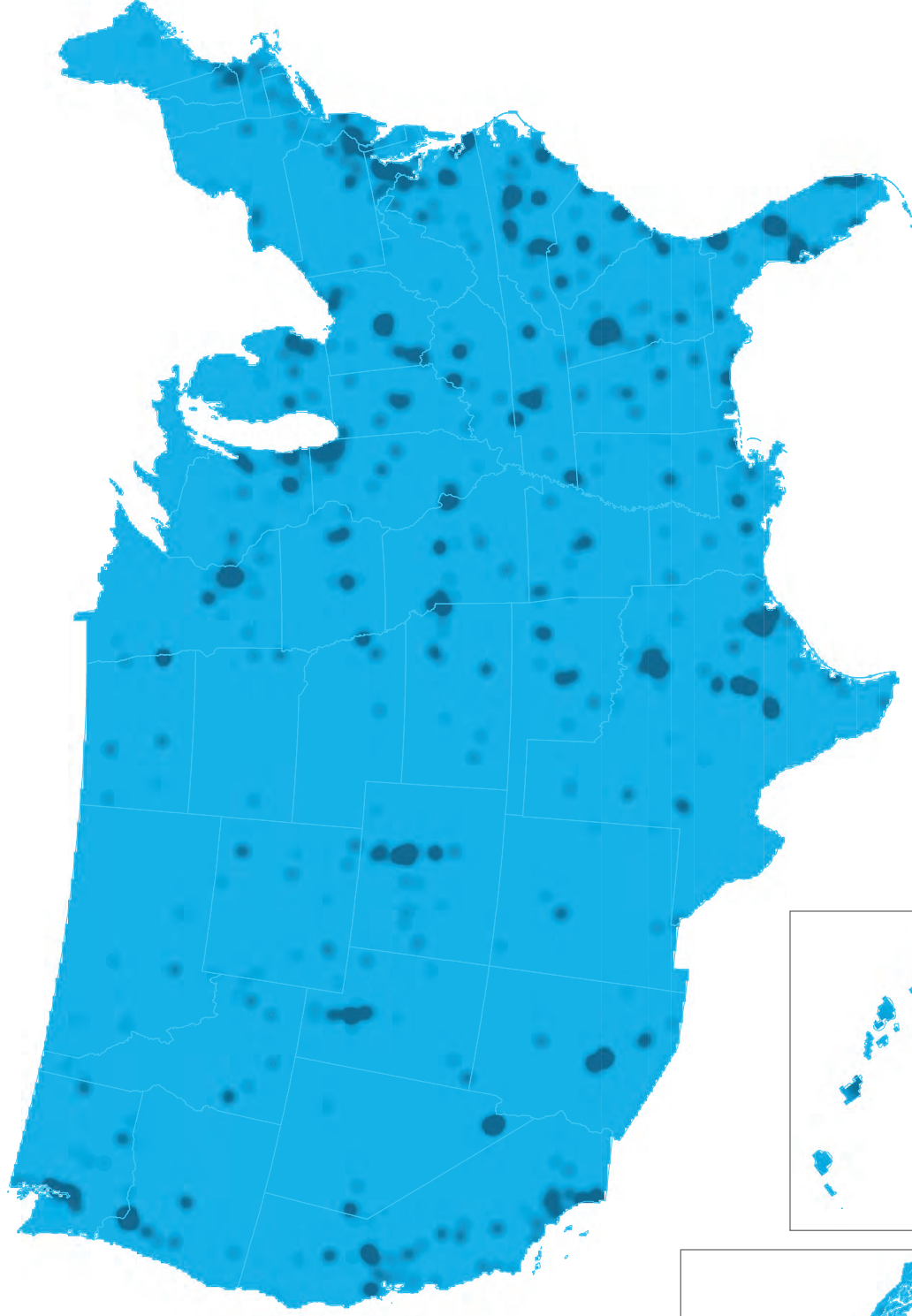
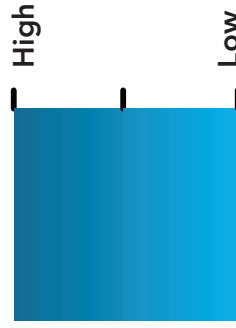




# Bright Young Professionals

## SEGMENT DENSITY

This map illustrates the density and distribution of the *Bright Young Professionals* Tapestry Segment by households.



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# NeWest Residents

Households: 970,800

Average Household Size: 3.35

Median Age: 27.3

Median Household Income: \$30,200



## WHO ARE WE?

For this young Hispanic market, life has taken many turns recently. They are new to America and new to their careers, with new, young families. Many are new to the English language; nearly one-third of households are linguistically isolated. NeWest Residents are ambitious and dream of a better life. They aren't ready to fully adopt the American way of life but are willing to take risks for the benefit of their families. As the breadwinners, the men of the house work long hours in blue collar jobs, primarily in the service industry. Skilled workers steer toward construction and manufacturing sectors. Female labor force participation is somewhat low, perhaps due to the language barrier, but also because of their parenting responsibilities.

## OUR NEIGHBORHOOD

- They're concentrated in larger metropolitan areas (over half a million people) in the South and West.
- Reside in mostly renter-occupied apartments in older, mid- to high-rise buildings. Over 80% of housing units were built before 1990. Rental rates are below the US average (Index 85).
- Half of the households have children, in either married-couple or single-parent families.
- With average household size exceeding three, presence of children less than 5 years old is high compared to the US average. Dependent children represent approximately one-third of the population.

## SOCIOECONOMIC TRAITS

- Female labor participation is slightly lower than the US average, partially attributable to the language barrier in this diverse foreign-born market.
- Male labor force participation (Index 116) is compulsory for these new families.
- Working full-time in blue collar jobs, this market works hard and dreams big. They seek adventure and take risks for the betterment of their families.
- They are automotive enthusiasts; if they had the savings, they would buy a used, but bold, fun-to-drive vehicle.



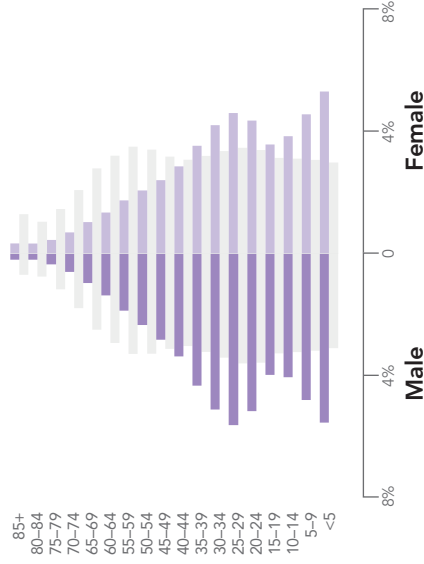
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



**AGE BY SEX** (Esri data)

**Median Age: 27.3** US: 38.2

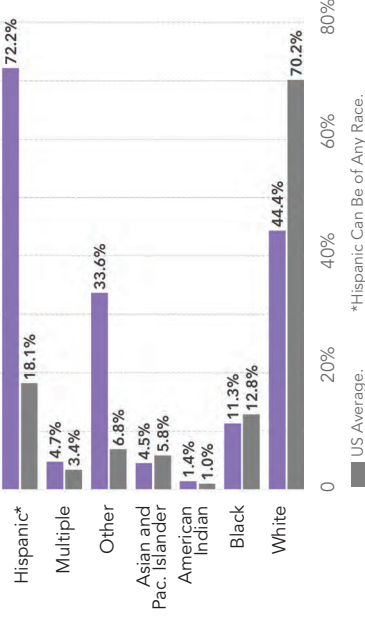
■ Indicates US



**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).

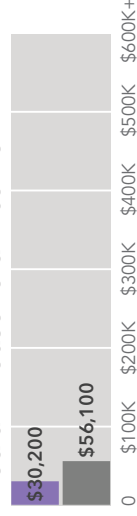
**Diversity Index: 87.3** US: 64.0



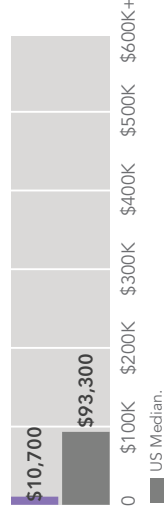
**INCOME AND NET WORTH**

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

**Median Household Income**

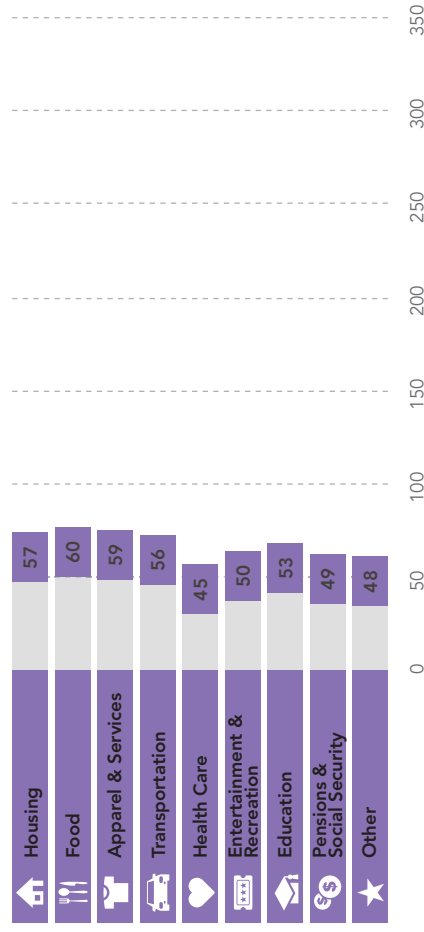


**Median Net Worth**



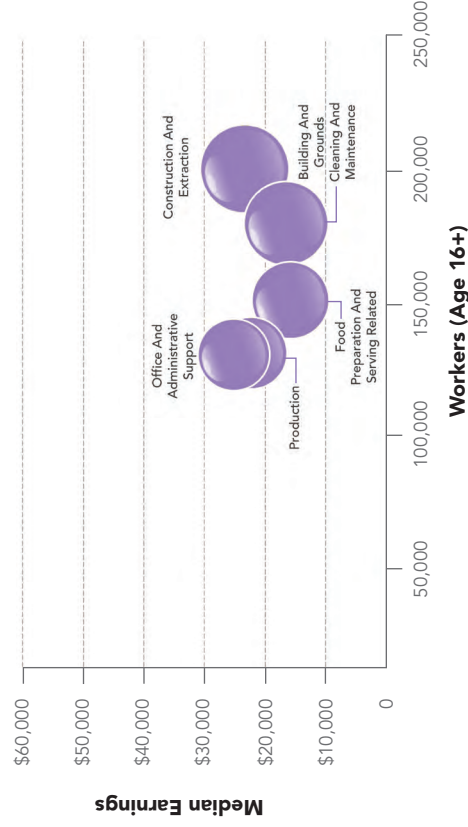
**AVERAGE HOUSEHOLD BUDGET INDEX**

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



**OCCUPATION BY EARNINGS**

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



**MARKET PROFILE**

(Consumer preferences are estimated from data by GfK MRI)

- This foreign-born market has not quite yet adopted the norms of American life. They don't watch sports on TV, or listen to popular music. They prefer to watch Spanish-language channels on TV. However, fast food dining is a big hit.
- NeWest Residents consumers love their caffeine; drinking coffee, sodas, sports, and energy drinks.
- A large portion of their income goes toward baby and children products—disposable diapers, baby food, furniture and equipment, and vitamin supplements.
- They prefer to use cash; debit card ownership is low. Without a credit history, it is difficult for these new immigrants to obtain a credit card.

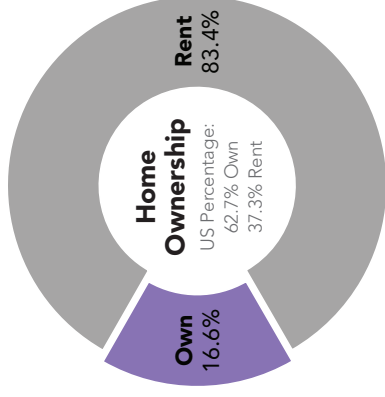
**HOUSING**

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.



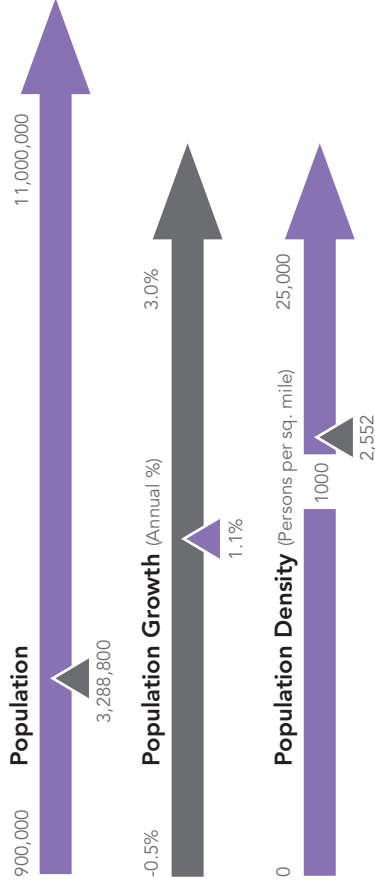
**Typical Housing:**  
 Multi-Unit Rentals

**Average Rent:**  
 \$887  
 US Average: \$1,038



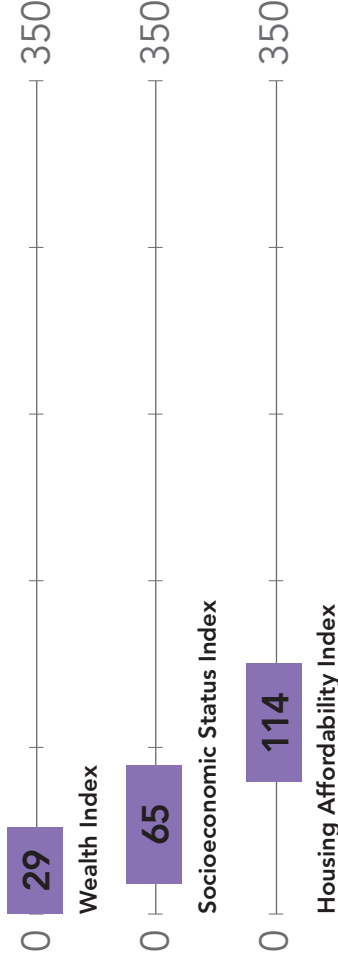
**POPULATION CHARACTERISTICS**

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.

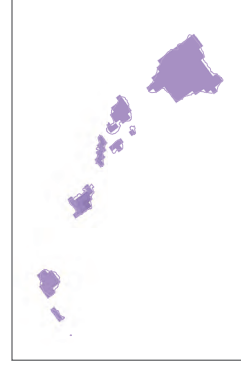
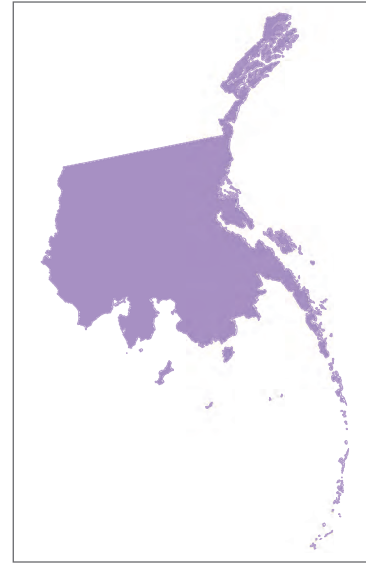
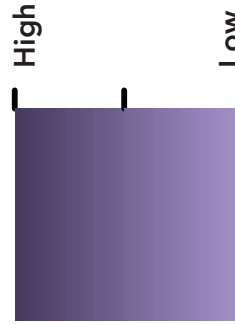
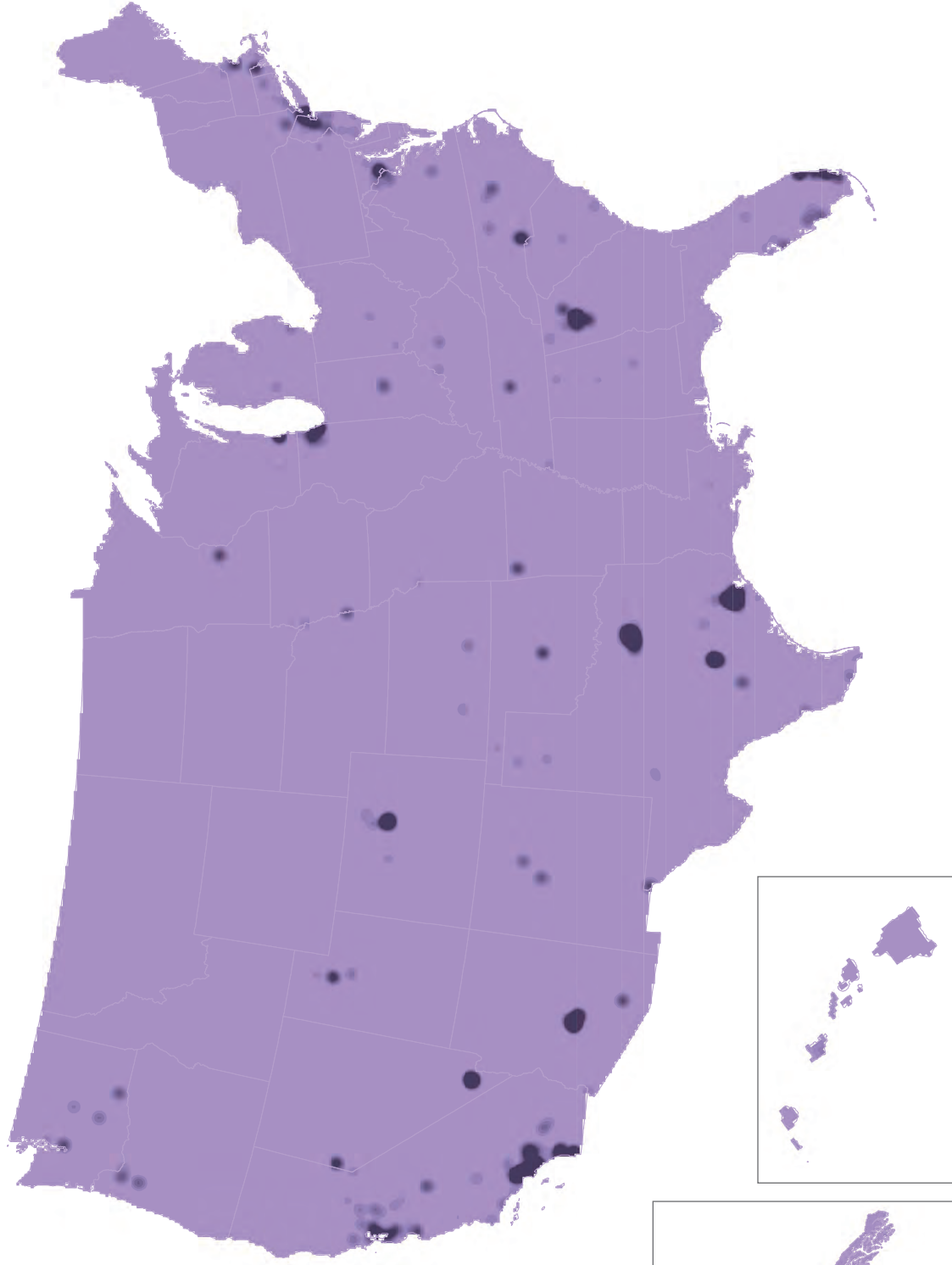






## SEGMENT DENSITY

This map illustrates the density and distribution of the NeWest Residents Tapestry Segment by households.



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LifeMode Group: Midtown Singles

# Metro Fusion

Households: 1,753,500

Average Household Size: 2.65

Median Age: 29.3

Median Household Income: \$35,700

11C



## WHO ARE WE?

*Metro Fusion* is a young, diverse market. Many residents do not speak English fluently and have moved into their homes recently. They are highly mobile and over three quarters of households are occupied by renters. Many households have young children; a quarter are single-parent families. The majority of residents live in midsize apartment buildings. *Metro Fusion* is a hard-working market with residents that are dedicated to climbing the ladders of their professional and social lives. This is particularly difficult for the single parents due to median incomes that are 36% lower than the US level.

## OUR NEIGHBORHOOD

- Over 60% of the homes are multiunit structures located in the urban periphery.
- Three quarters of residents are renters, and rents are about thirteen percent less than the US average.
- The majority of housing units were built before 1990.
- Single-parent and single-person households make up over half of all households.

## SOCIOECONOMIC TRAITS

- They're a diverse market with 31% black, 34% Hispanic, and 20% foreign born.
- Younger residents are highly connected, while older residents do not have much use for the latest and greatest technology.
- They work hard to advance in their professions, including working weekends.
- They take pride in their appearance, consider their fashion trendy, and stick with the same few designer brands.
- They spend money readily on what's hot unless saving for something specific.
- Social status is very important; they look to impress with fashion and electronics.



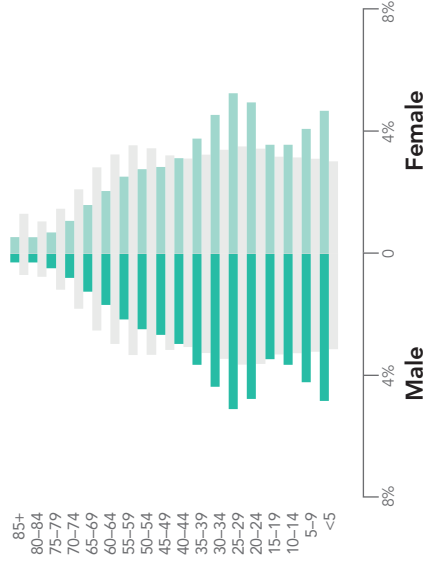
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



## AGE BY SEX (Esri data)

**Median Age: 29.3** US: 38.2

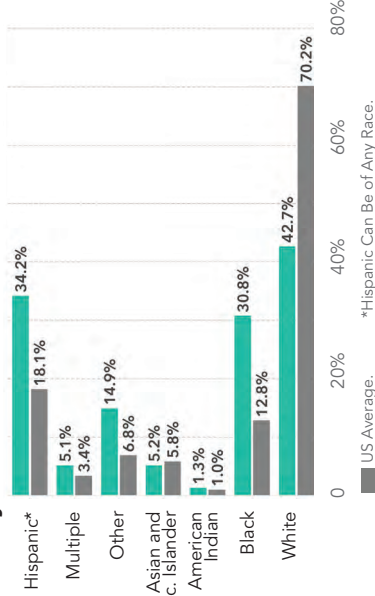
■ Indicates US



## RACE AND ETHNICITY (Esri data)

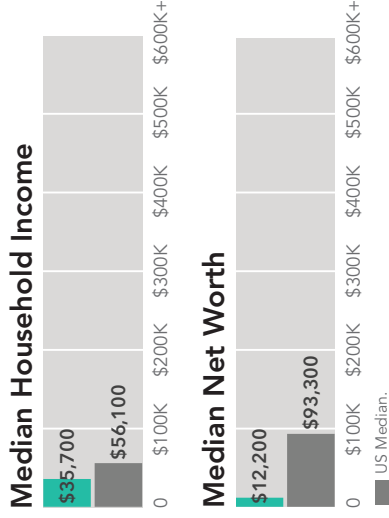
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 84.6** US: 64.0



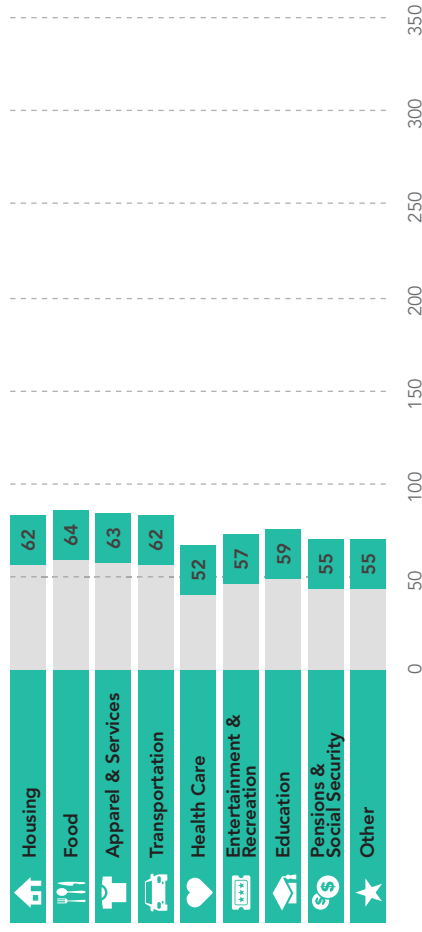
## INCOME AND NET WORTH

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.



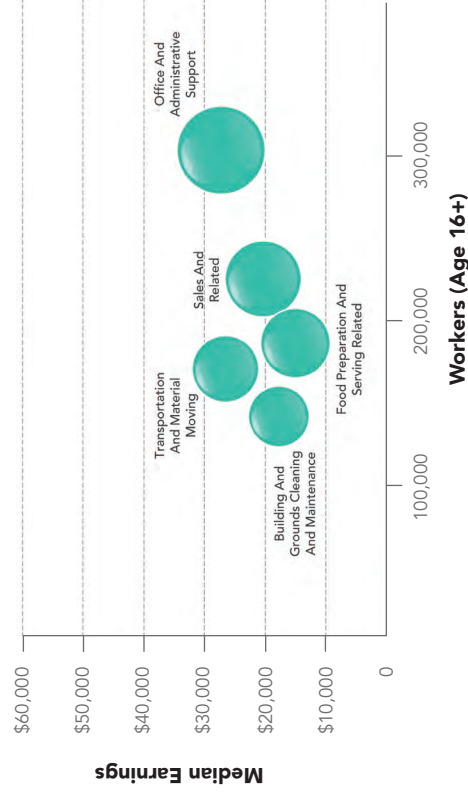
## AVERAGE HOUSEHOLD BUDGET INDEX

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## OCCUPATION BY EARNINGS

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



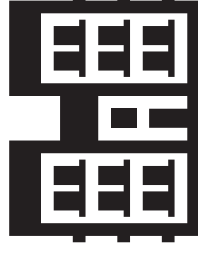
### MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- They enjoy watching MTV, BET, Spanish TV networks, and Tru TV.
- They listen to R&B, rap, Latin, and urban music.
- Football and weight lifting are popular activities.
- They shop at discount grocery stores, Family Dollar, and Walmart.
- They often eat frozen dinners, but when dining out prefer McDonald's, Taco Bell, Burger King, and Pizza Hut.

### 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 Community Survey.



**Typical Housing:**  
 Multi-Unit Rentals;  
 Single Family

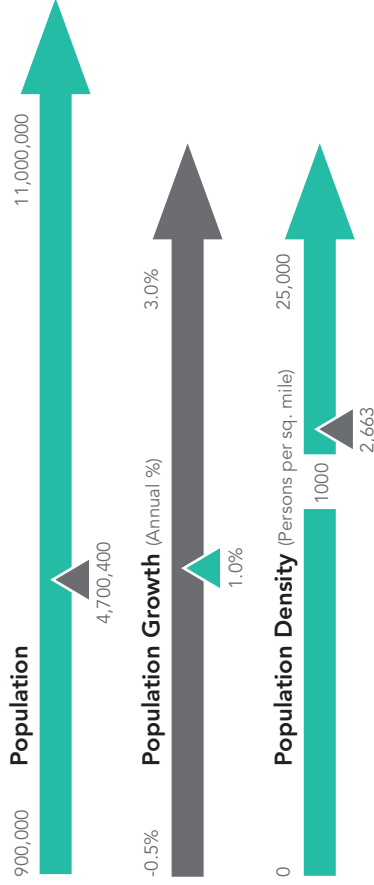
**Average Rent:**  
 \$898

US Average: \$1,038



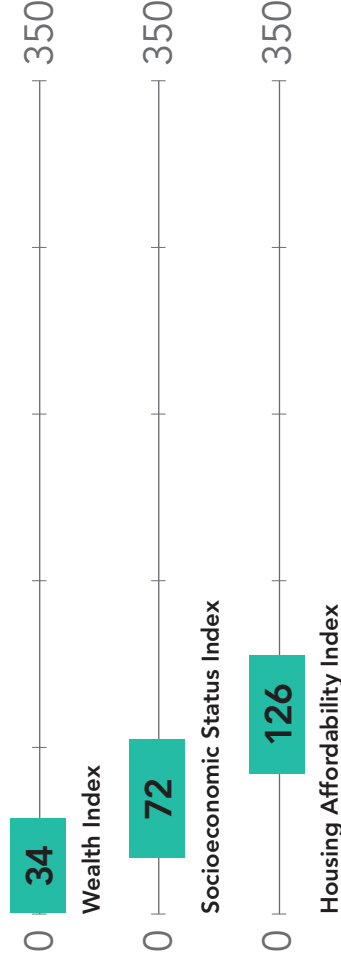
### POPULATION CHARACTERISTICS

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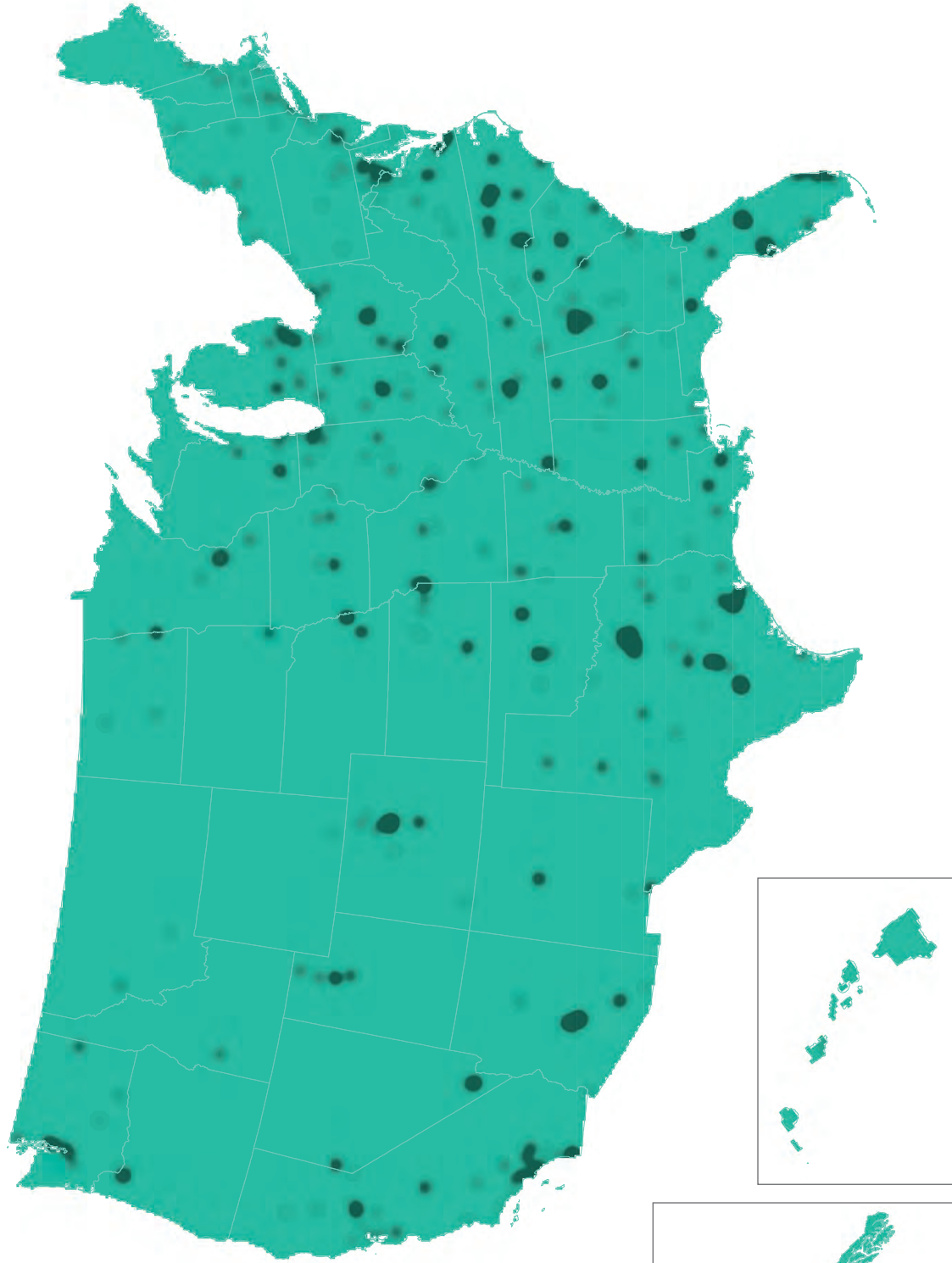
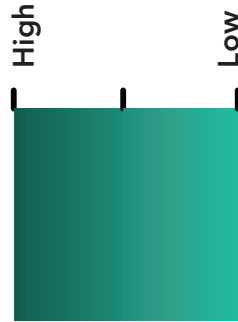
### ESRI INDEXES

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 Metro Fusion Tapestry Segment by households.





LifeMode Group: Ethnic Enclaves

# American Dreamers

7C

Households: 1,824,900

Average Household Size: 3.19

Median Age: 32.5

Median Household Income: \$50,900



## WHO ARE WE?

Located throughout the South and West, most American Dreamers residents own their own homes, primarily single-family housing—farther out of the city, where housing is more affordable. Median household income is slightly below average (Index 91). The majority of households include younger married-couple families with children and, frequently, grandparents. Diversity is high; many residents are foreign born, of Hispanic origin. Hard work and sacrifice have improved their economic circumstance as they pursue a better life for themselves and their family. Spending is focused more on the members of the household than the home. Entertainment includes multiple televisions, movie rentals, and video games at home or visits to theme parks and zoos. This market is connected and adept at accessing what they want from the Internet.

## OUR NEIGHBORHOOD

- American Dreamers residents are family-centric and diverse. Most are married couples with children of all ages or single parents; multigenerational homes are common (Index 201).
- Average household size is higher at 3.19 (Index 123).
- Residents tend to live further out from urban centers—more affordable single-family homes and more elbow room.
- Tenure is slightly above average with 64% owner occupancy; primarily single-family homes with more mortgages (Index 114) and slightly higher monthly costs (Index 115).
- Three quarters of all housing were built since 1970.
- Many neighborhoods are located in the urban periphery of the largest metropolitan areas across the South and West.
- Most households have one or two vehicles available and a longer commute to work.

## SOCIOECONOMIC TRAITS

- While nearly 17% have earned a college degree, the majority, or 63%, hold a high school diploma only or spent some time at a college or university.
- Unemployment is higher at 7.4% (Index 136); labor force participation is also higher at 66%.
- Most American Dreamers residents derive income from wages or salaries, but the rate of poverty is a bit higher in this market (Index 116).
- They tend to spend money carefully and focus more on necessities.
- They are captivated by new technology, particularly feature-rich smartphones.
- Connected: They use the Internet primarily for socializing but also for convenience, like paying bills online.

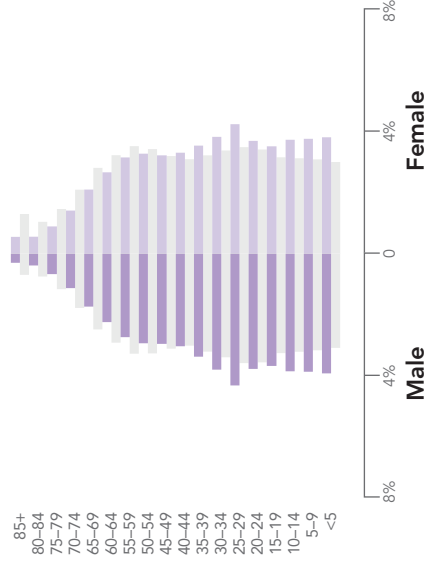
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



**AGE BY SEX** (Esri data)

**Median Age: 32.5** US: 38.2

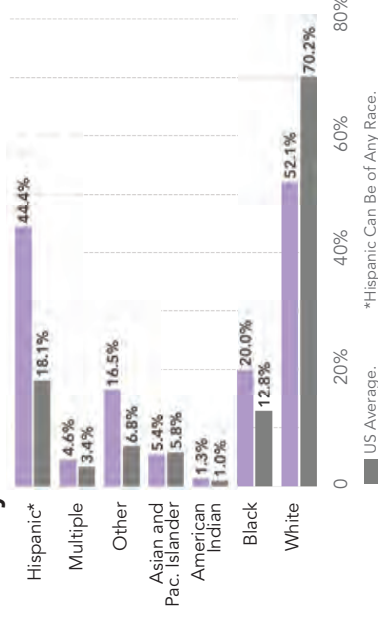
■ Indicates US



**RACE AND ETHNICITY** (Esri data)

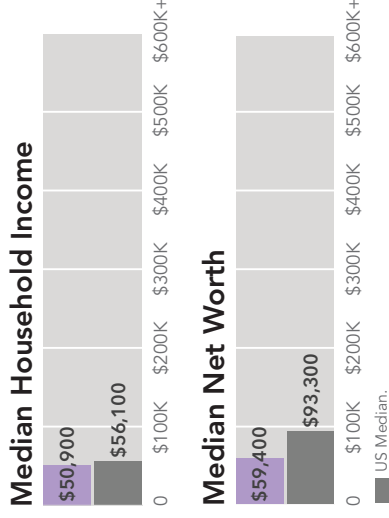
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 84.1** US: 64.0



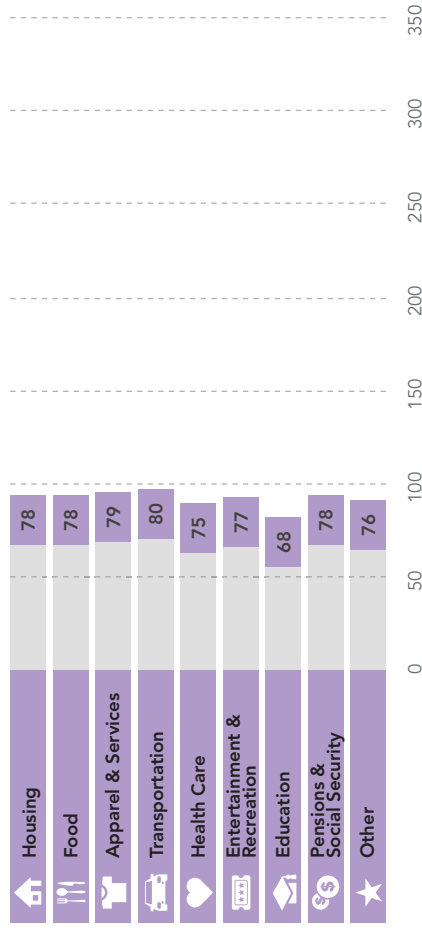
**INCOME AND NET WORTH**

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.



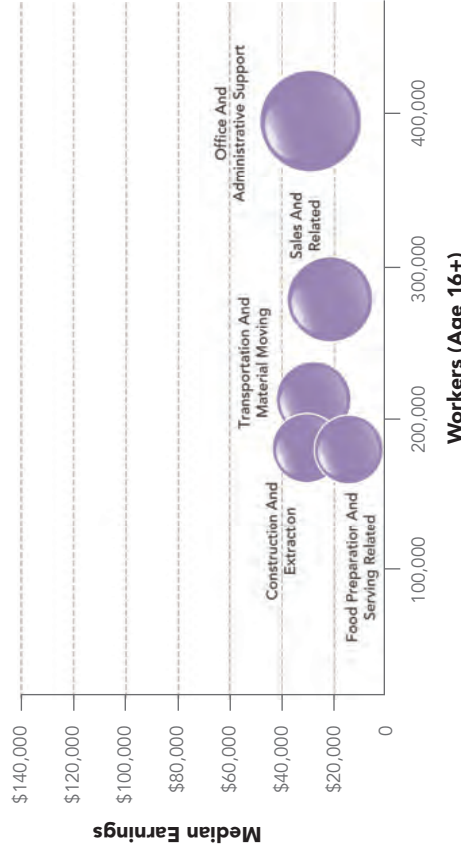
**AVERAGE HOUSEHOLD BUDGET INDEX**

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



**OCCUPATION BY EARNINGS**

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



**MARKET PROFILE**

(Consumer preferences are estimated from data by GfK MRI)

- When dining out, these residents favor fast-food dining places such as Taco Bell or Little Caesar's, as well as family-friendly restaurants like Olive Garden, Denny's, or IHOP.
- Cell phones are preferred over landlines.
- Favorite channels include Animal Planet, MTV, ABC Family Channel, Bravo, and Nick Jr., as well as programming on Spanish TV.
- Residents listen to urban or Hispanic radio.
- During the summer, family outings to theme parks are especially popular.

**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.



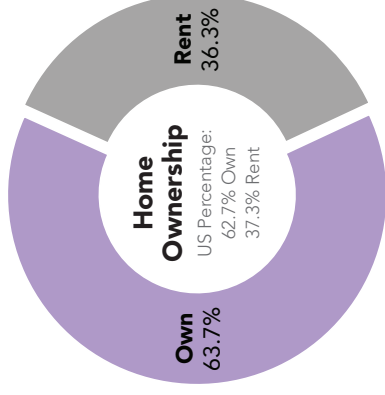
**Typical Housing:**

Single Family

**Median Value:**

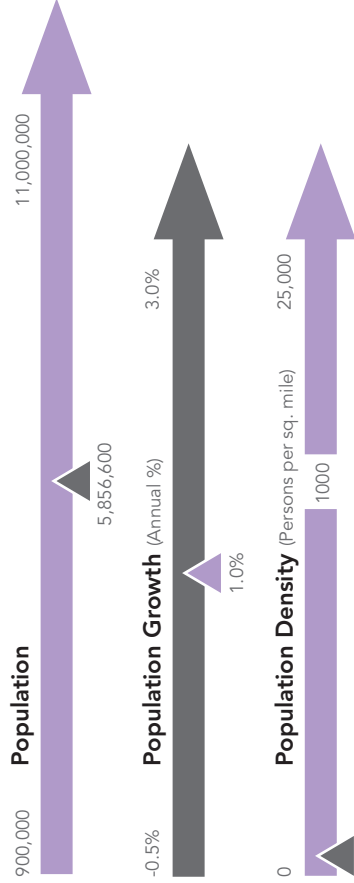
\$145,900

US Median: \$207,300



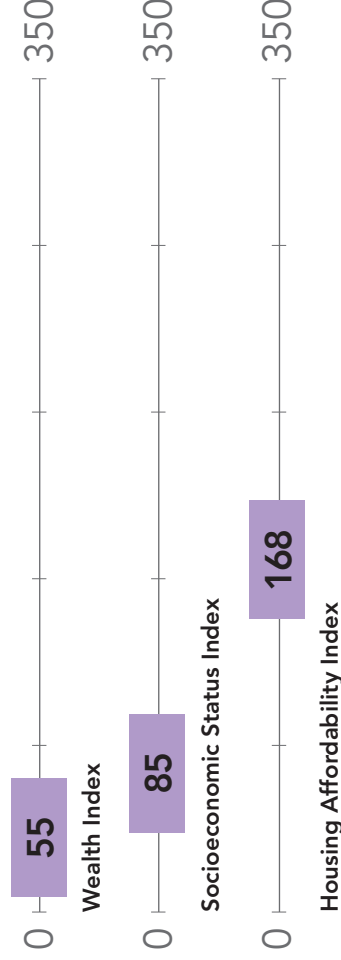
**POPULATION CHARACTERISTICS**

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.







LifeMode Group: Ethnic Enclaves

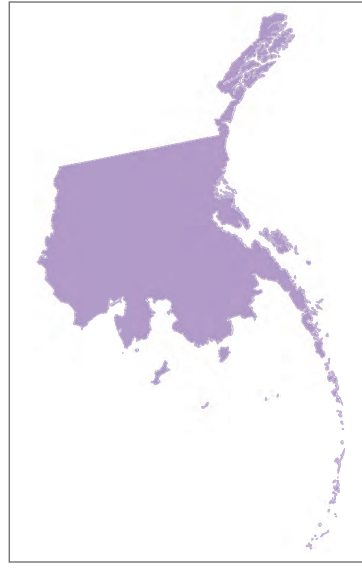
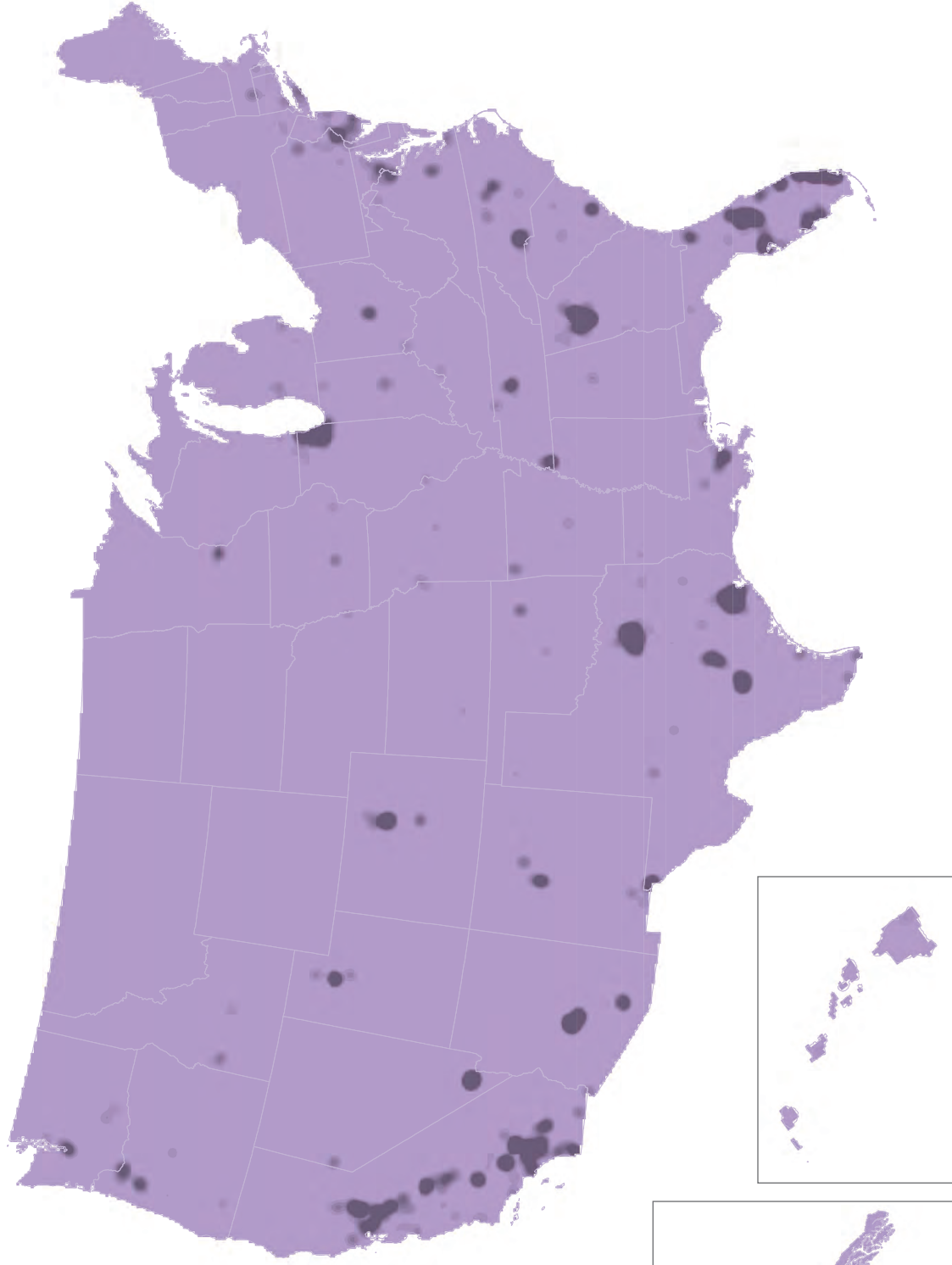
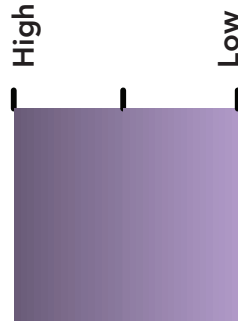
# American Dreamers

**TAPESTRY  
SEGMENTATION**  
esri.com/tapestry



## SEGMENT DENSITY

This map illustrates the density and distribution of the American Dreamers 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).
- Unemployment rate is well below average at 3.3% (Index 61); 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.

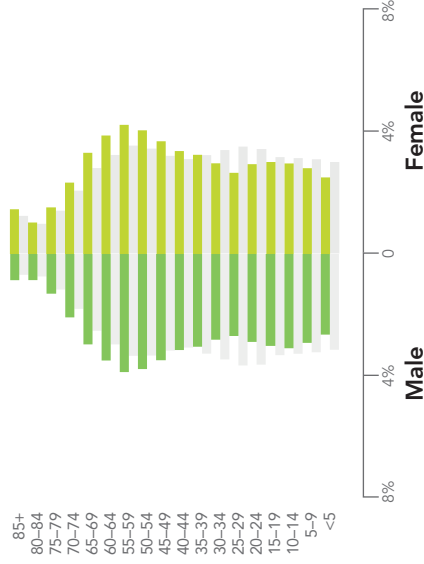


Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

### AGE BY SEX (Esri data)

**Median Age: 43.3** US: 38.2

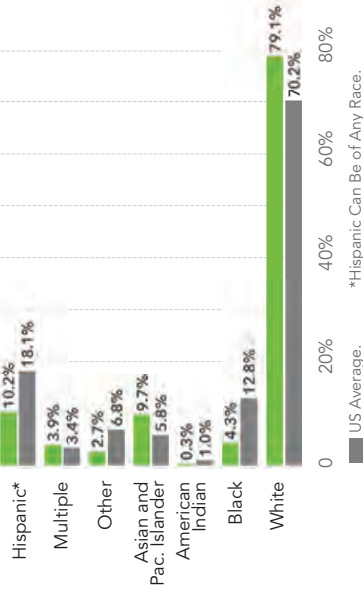
■ Indicates US



### RACE AND ETHNICITY (Esri data)

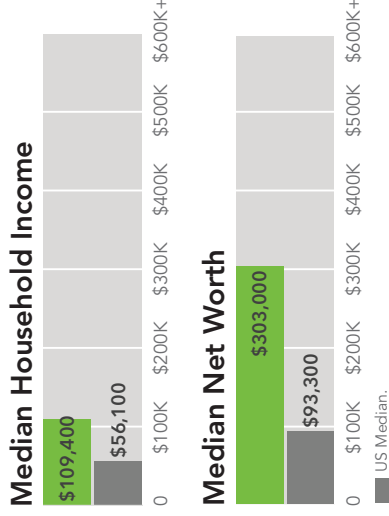
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 48.1** US: 64.0



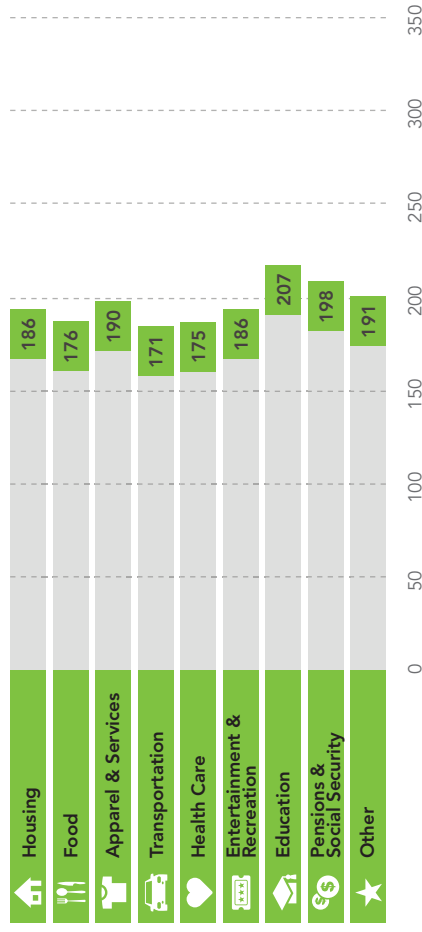
### INCOME AND NET WORTH

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.



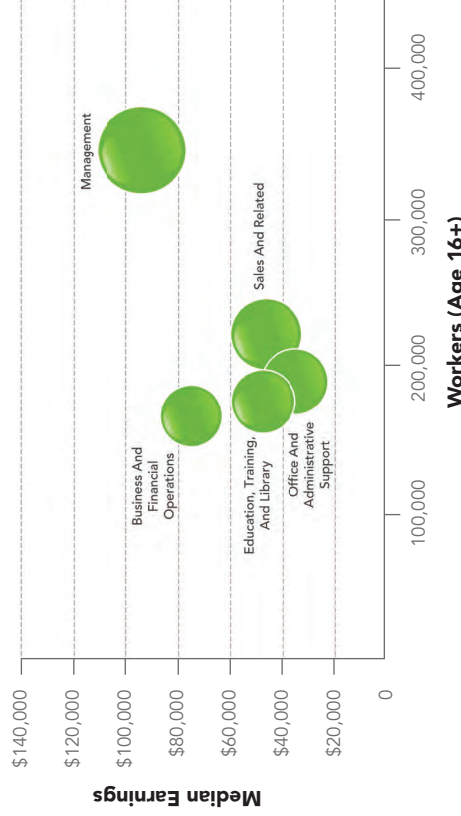
### AVERAGE HOUSEHOLD BUDGET INDEX

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



### OCCUPATION BY EARNINGS

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





## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- 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.



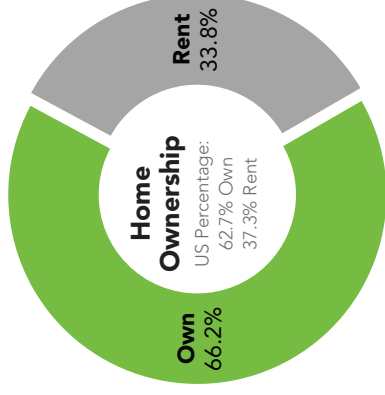
### Typical Housing:

Single Family

### Median Value:

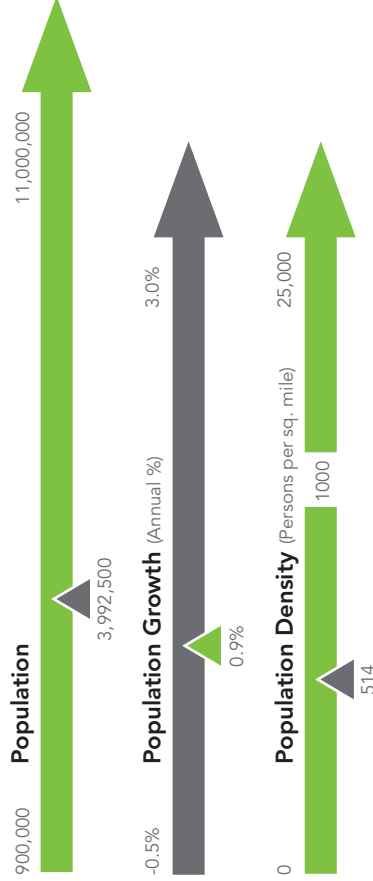
\$623,400

US Median: \$207,300



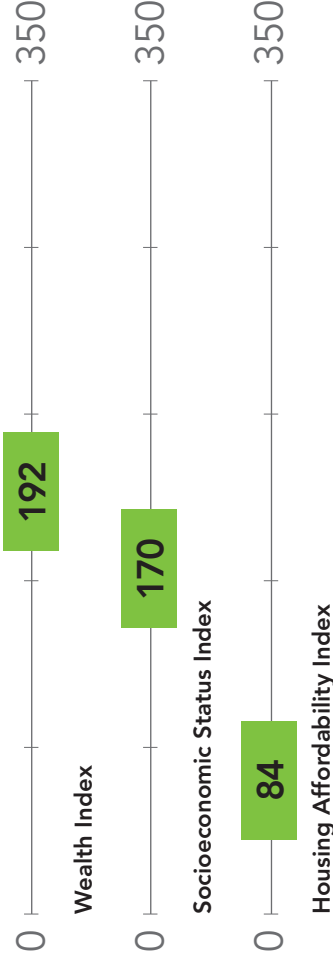
## POPULATION CHARACTERISTICS

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.



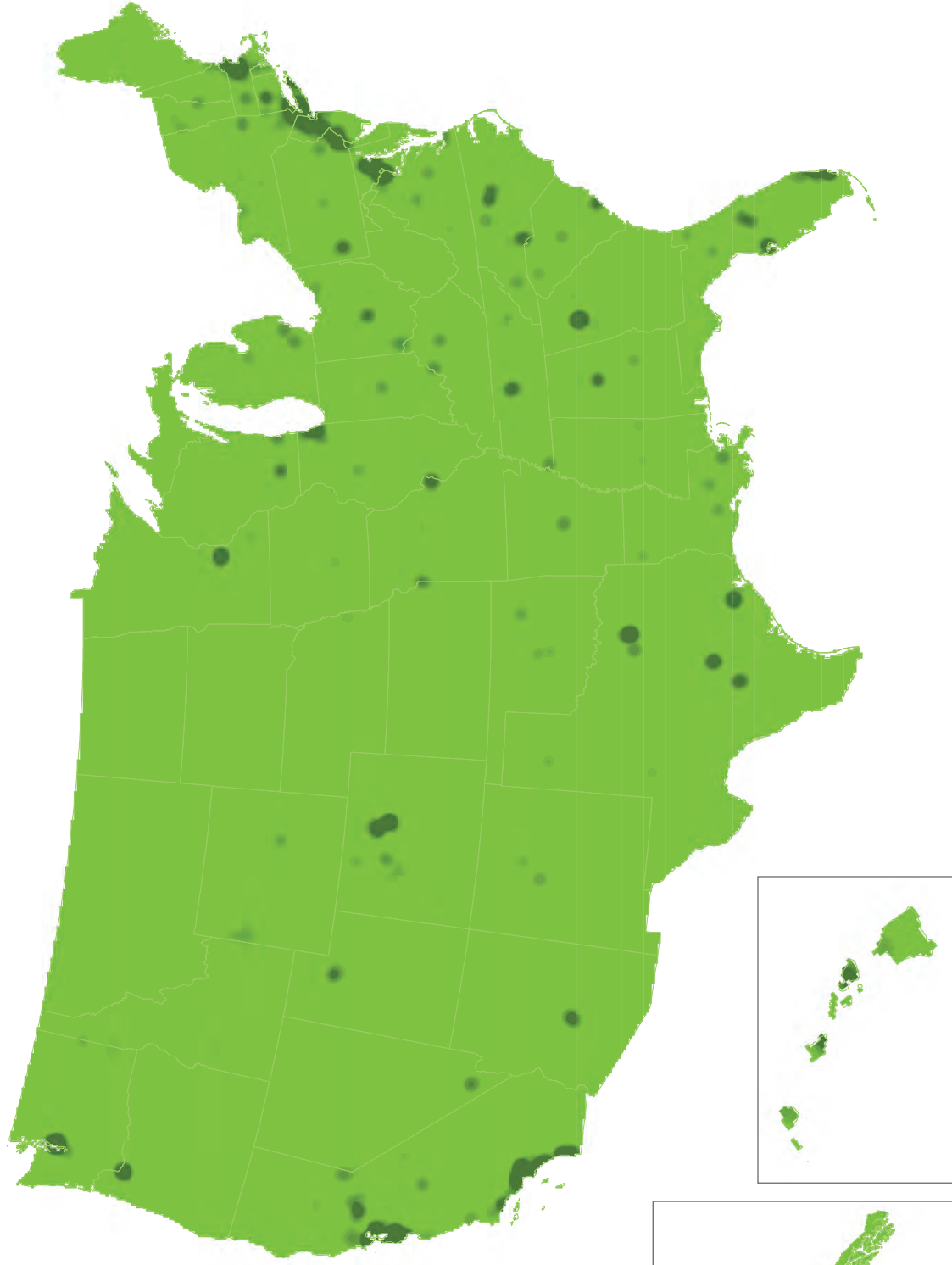
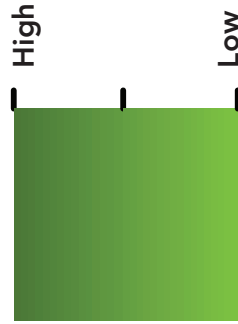


# LifeMode Group: Upscale Avenues Urban Chic



## SEGMENT DENSITY

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



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LifeMode Group: Middle Ground  
**Emerald City**

8B

Households: 1,748,600

Average Household Size: 2.06

Median Age: 37.4

Median Household Income: \$59,200



## WHO ARE WE?

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

## OUR NEIGHBORHOOD

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

## SOCIOECONOMIC TRAITS

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



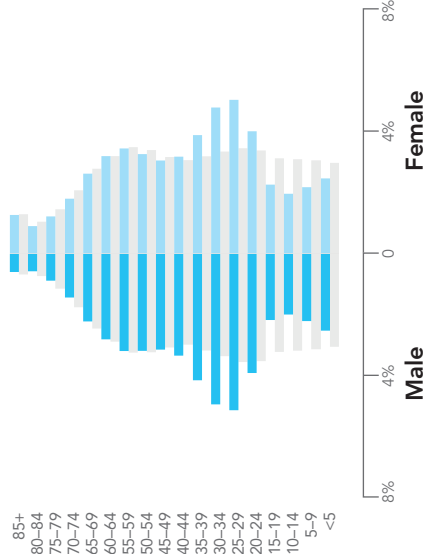
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



## AGE BY SEX (Esri data)

**Median Age: 37.4** US: 38.2

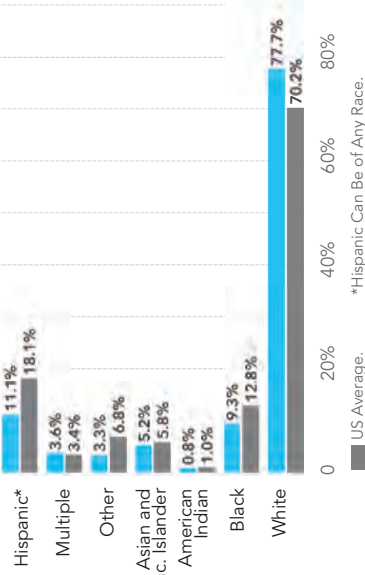
■ Indicates US



## RACE AND ETHNICITY (Esri data)

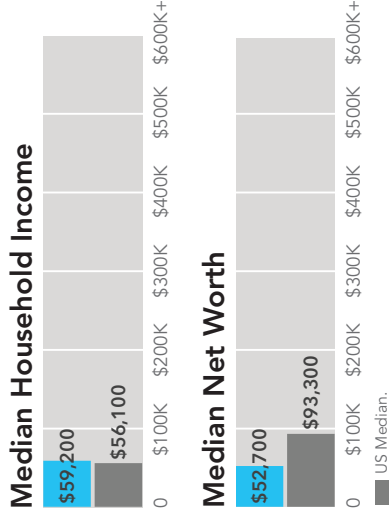
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 50.6** US: 64.0



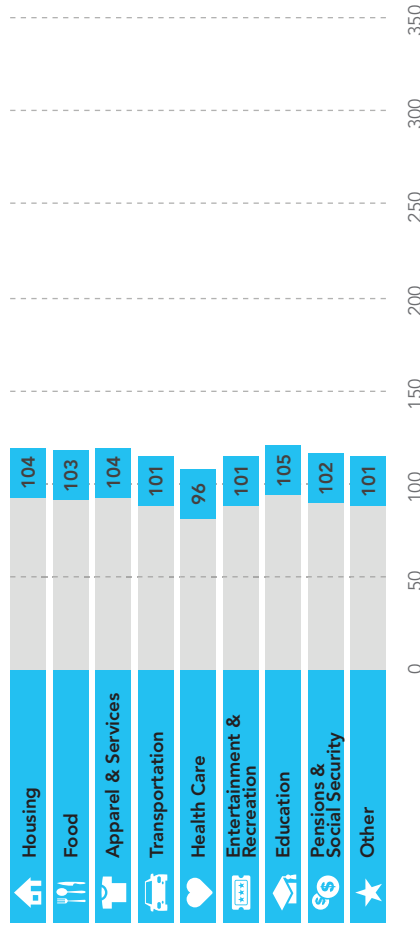
## INCOME AND NET WORTH

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.



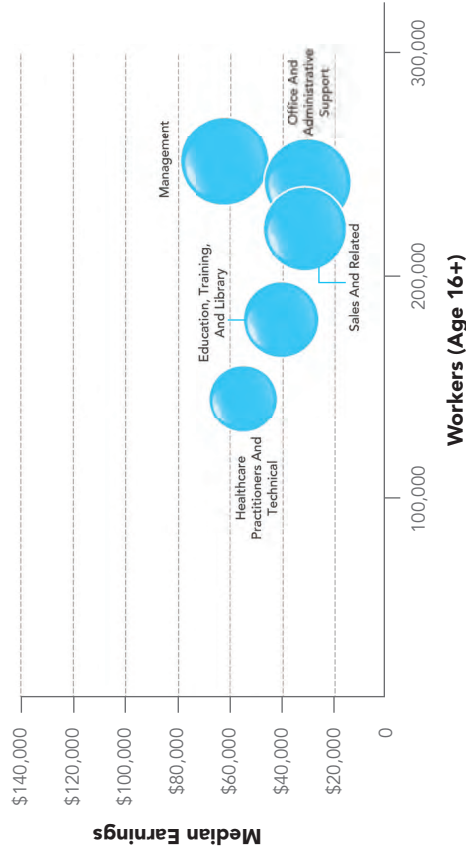
## AVERAGE HOUSEHOLD BUDGET INDEX

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



## OCCUPATION BY EARNINGS

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



## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

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

## HOUSING

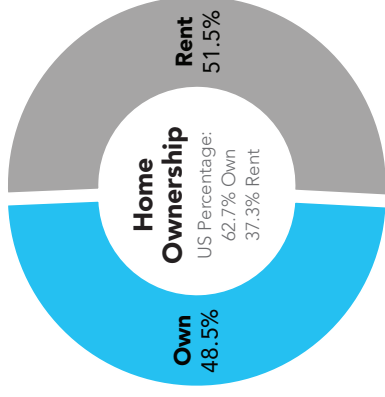
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family;  
Multi-Units

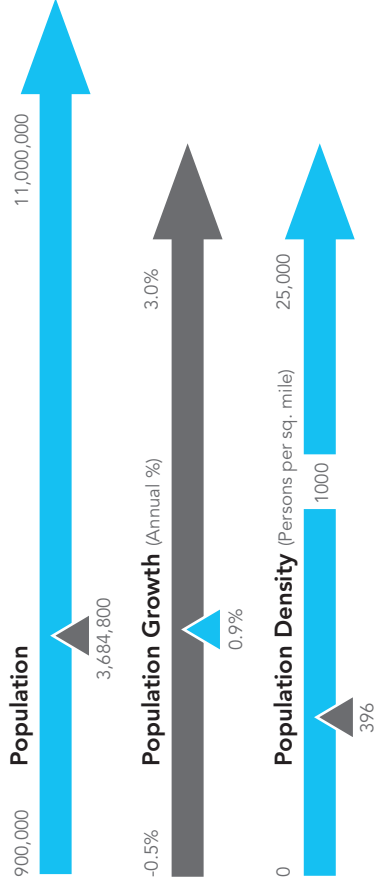
**Average Rent:**  
\$1,087

US Average: \$1,038



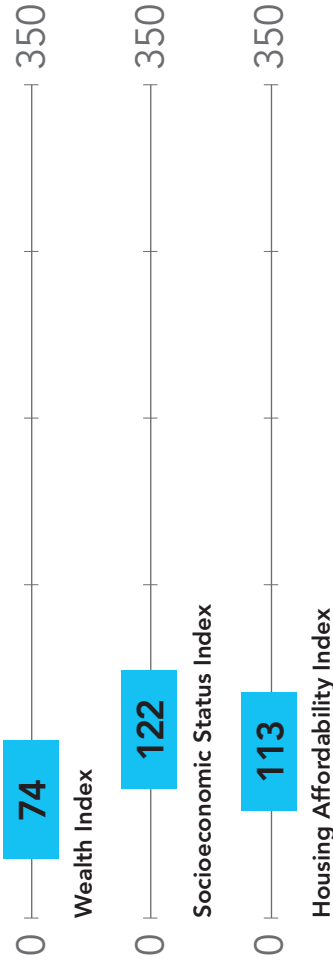
## POPULATION CHARACTERISTICS

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.



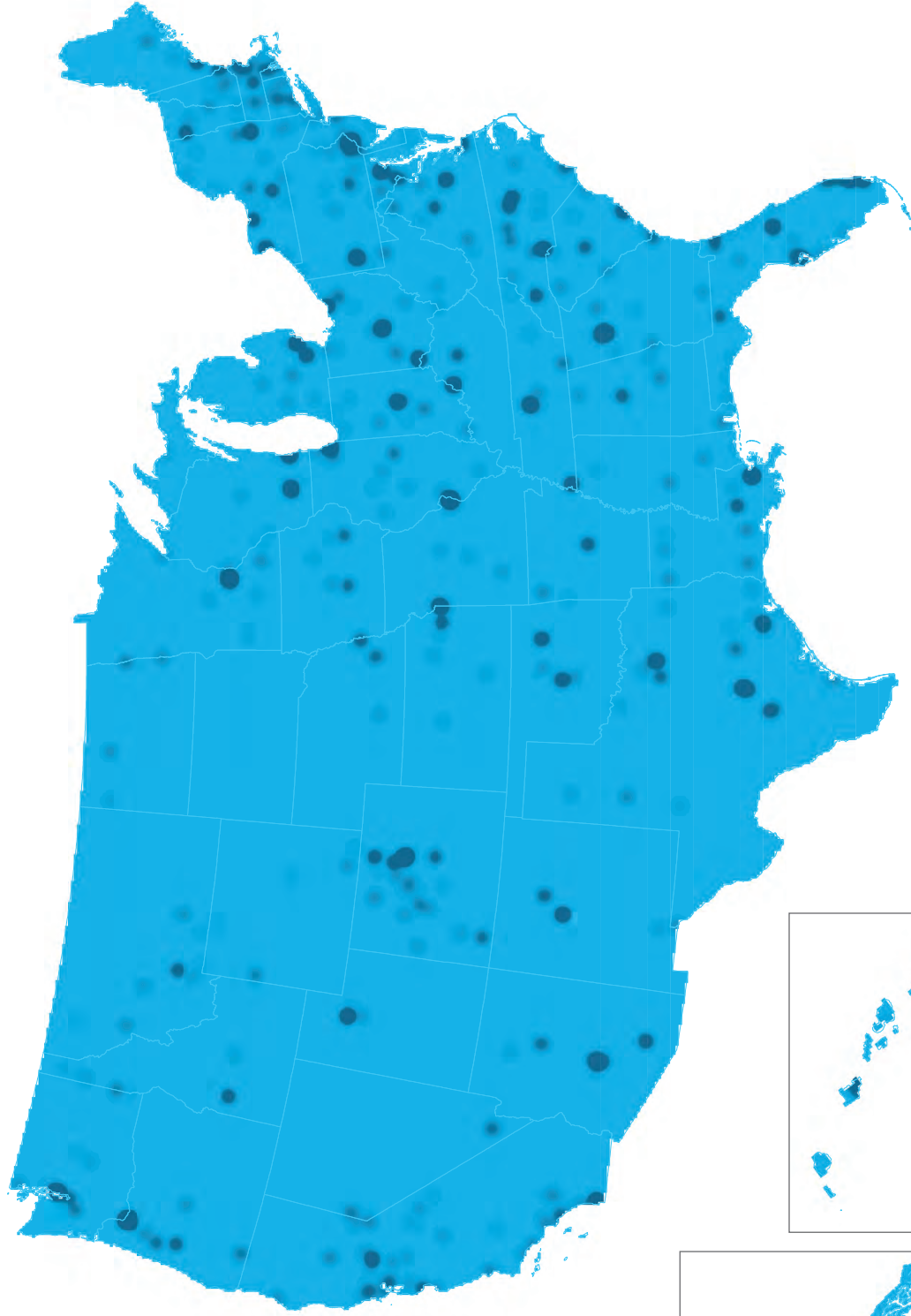
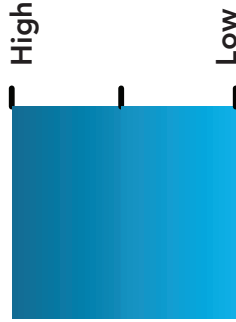
## ESRI INDEXES

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.



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LifeMode Group: Cozy Country Living

# Green Acres

6A

Households: 3,923,400

Average Household Size: 2.70

Median Age: 43.9

Median Household Income: \$76,800



## WHO ARE WE?

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

## OUR NEIGHBORHOOD

- Rural enclaves in metropolitan areas, primarily (not exclusively) older homes with acreage; new housing growth in the past 15 years.
- Single-family, owner-occupied housing, with a median value of \$235,500.
- An older market, primarily married couples, most with no children.

## SOCIOECONOMIC TRAITS

- Education: More than 60% are college educated.
- Unemployment is low at 3.8% (Index 70); labor force participation rate is high at 66.8% (Index 107).
- Income is derived not only from wages and salaries but also from self-employment (more than 13% of households), investments (27% of households), and increasingly, from retirement.
- They are cautious consumers with a focus on quality and durability.
- Comfortable with technology, more as a tool than a trend: banking or paying bills online is convenient; but the Internet is not viewed as entertainment.
- Economic outlook is professed as pessimistic, but consumers are comfortable with debt, primarily as home and auto loans, and investments.

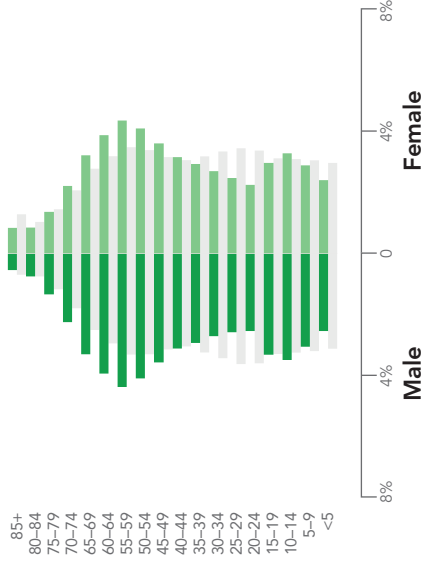


Note: The index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

### AGE BY SEX (Esri data)

**Median Age: 43.9** US: 38.2

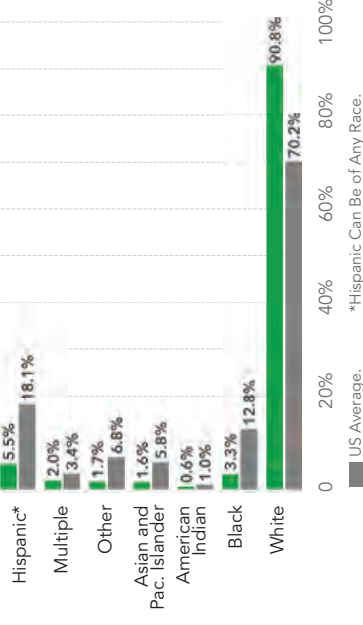
■ Indicates US



### RACE AND ETHNICITY (Esri data)

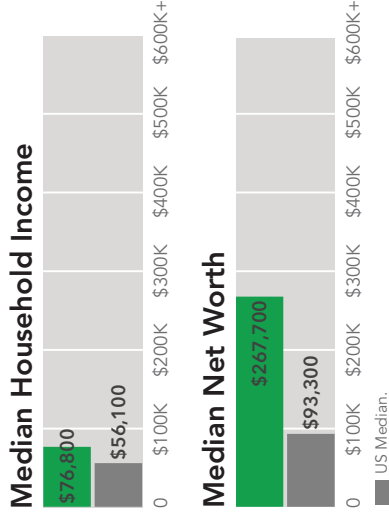
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 26.0** US: 64.0



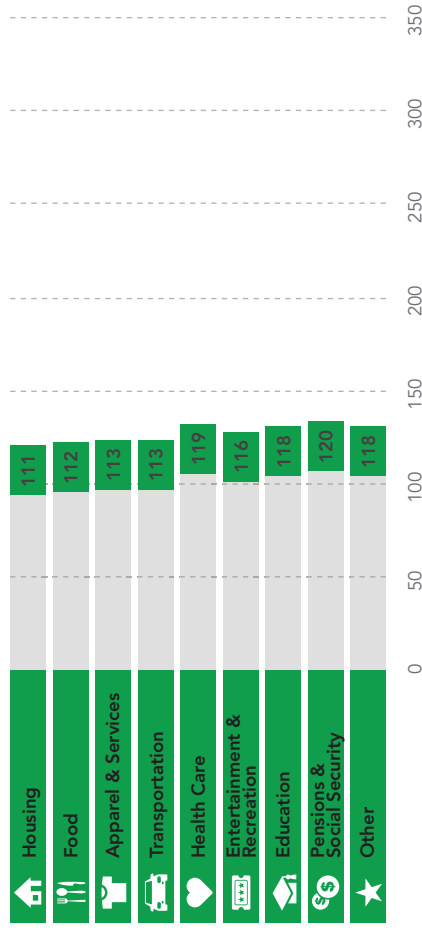
### INCOME AND NET WORTH

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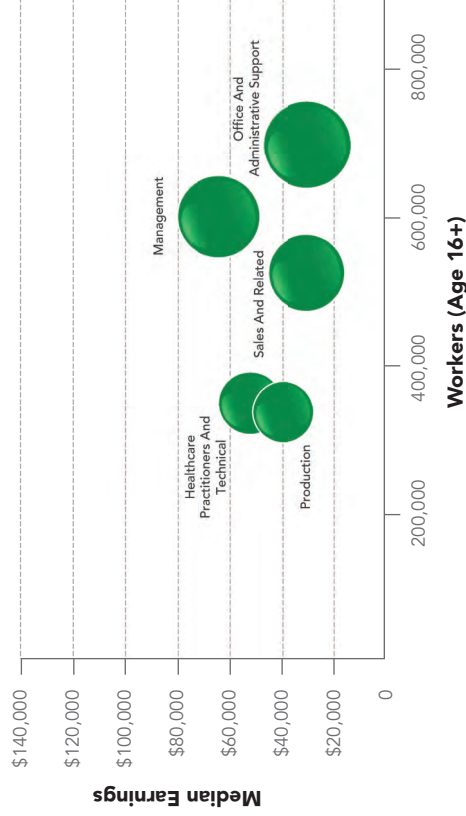
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### OCCUPATION BY EARNINGS

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





## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

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

## HOUSING

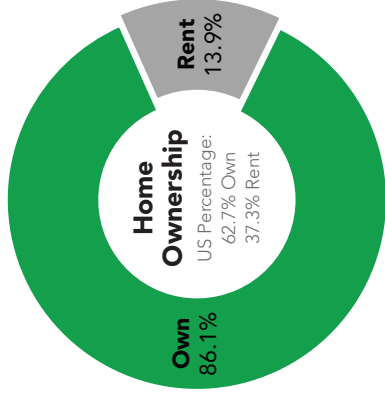
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family

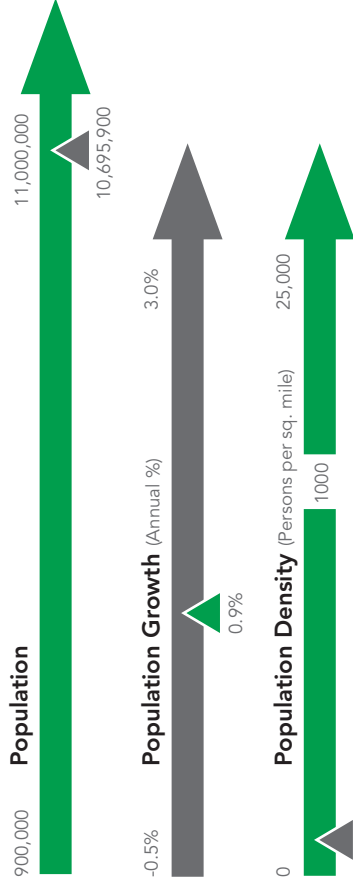
**Median Value:**  
\$235,500

US Median: \$207,300



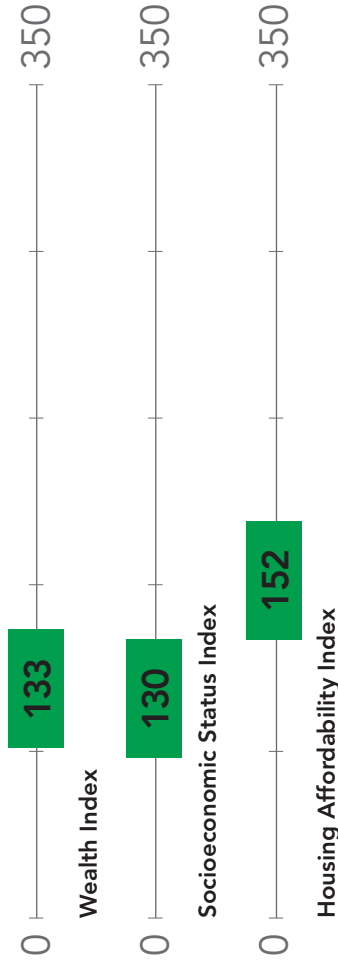
## POPULATION CHARACTERISTICS

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.





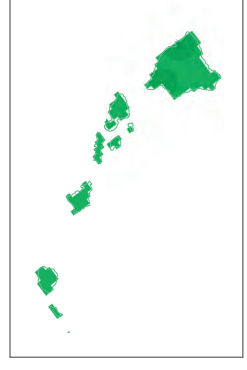
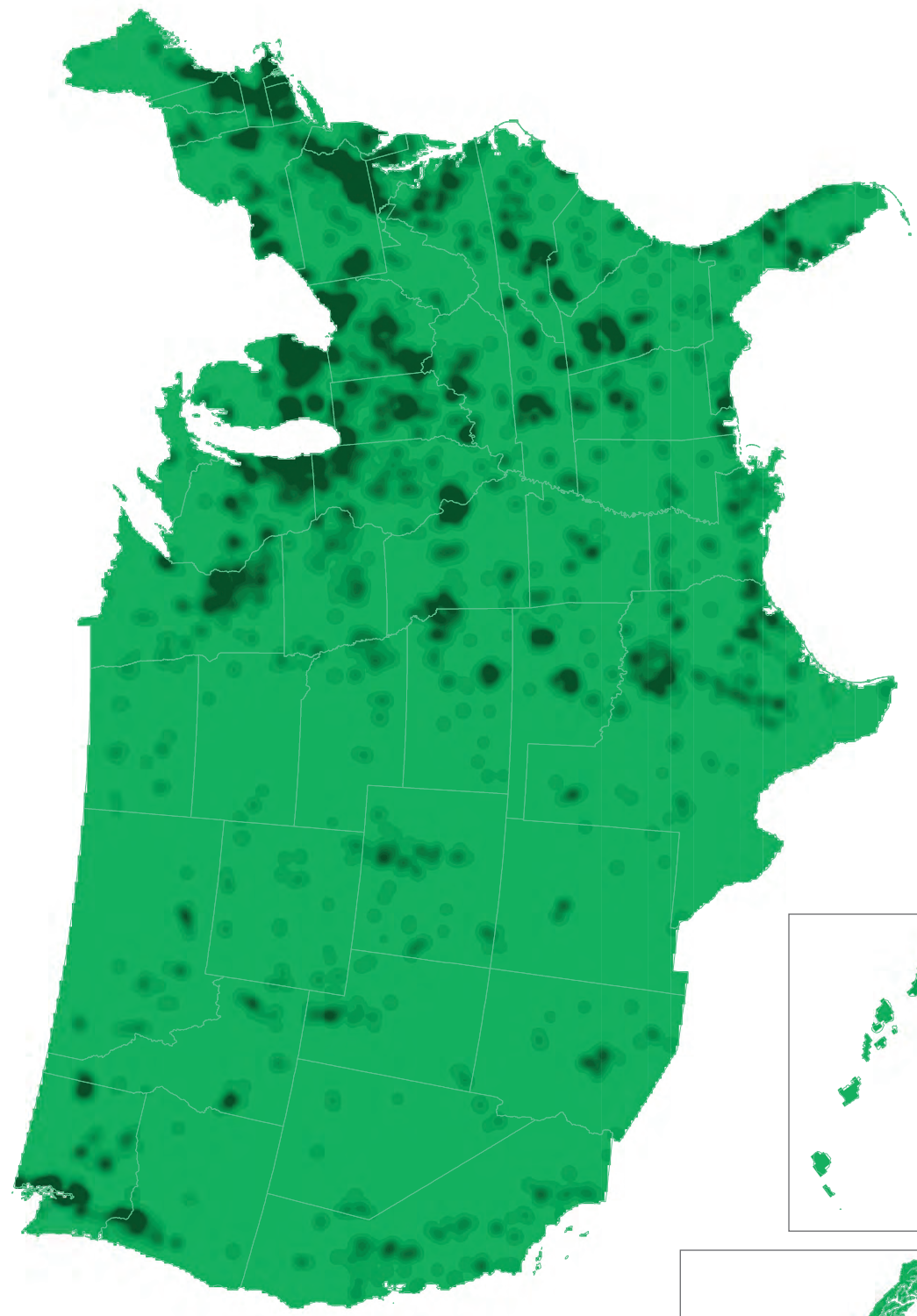
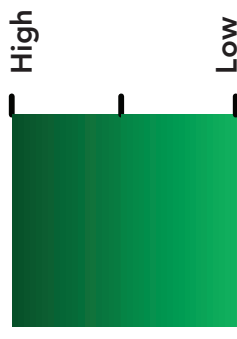


# LifeMode Group: Cozy Country Living Green Acres



## SEGMENT DENSITY

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



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LifeMode Group: Rustic Outposts

# Down the Road

Households: 1,406,700

Average Household Size: 2.76

Median Age: 35.0

Median Household Income: \$38,700

10D



## WHO ARE WE?

Down the Road is a mix of low-density, semirural neighborhoods in large metropolitan areas; half are located in the South, with the rest chiefly in the West and Midwest. Almost half of householders live in mobile homes; more than two-fifths live in single-family homes. These are younger, diverse communities, with the highest proportion of American Indians of any segment. These family-oriented consumers value their traditions. Workers are in service, retail trade, manufacturing, and construction industries, with higher proportions in agriculture and mining, compared to the US. This market has higher unemployment, much lower median household income and home value, and more than a fifth of households with income below poverty level.

## OUR NEIGHBORHOOD

- Nearly two-thirds of households are owned.
- Family market, primarily married couples or single-parent households (Index 145).
- Close to half of all households live in mobile homes (Index 780).
- Four-fifths of households were built in 1970 or later.
- About 32% of homes are valued under \$50,000 (over 4 times the US percentage).

## SOCIOECONOMIC TRAITS

- Education completed: 36% with a high school diploma only, 41% with some college education or a degree.
- Unemployment rate is 7.8%, higher than the US rate.
- Labor force participation rate is 59.0%, slightly lower than the US.
- Family-oriented, outgoing consumers; they place importance on preserving time-honored customs.
- They put a premium on convenience rather than health and nutrition.

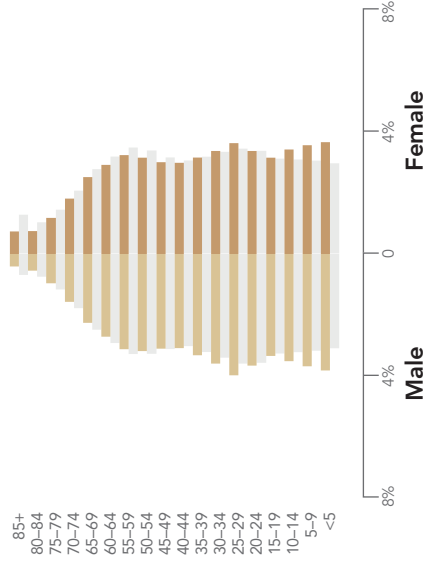


Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

### AGE BY SEX (Esri data)

Median Age: 35.0 US: 38.2

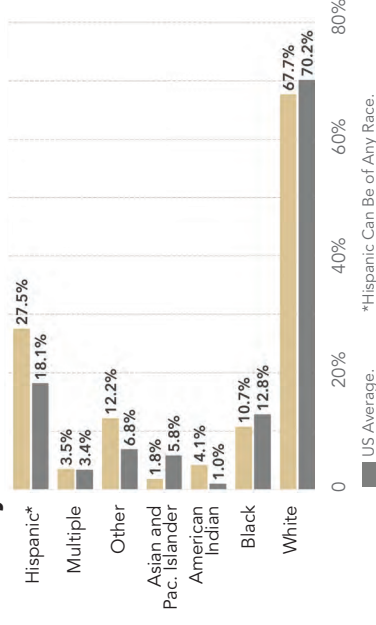
■ Indicates US



### RACE AND ETHNICITY (Esri data)

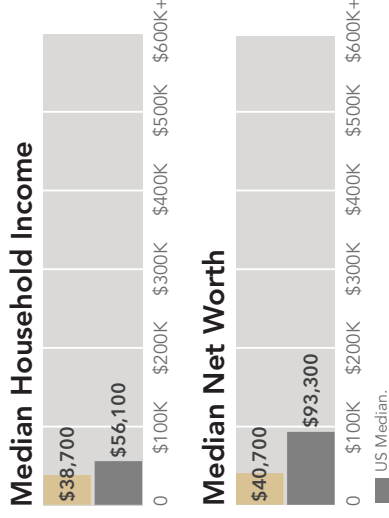
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 71.7 US: 64.0



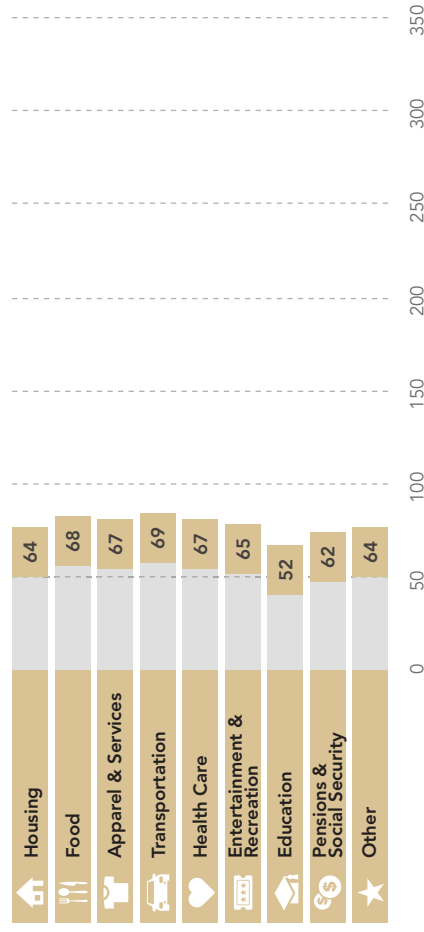
### INCOME AND NET WORTH

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.



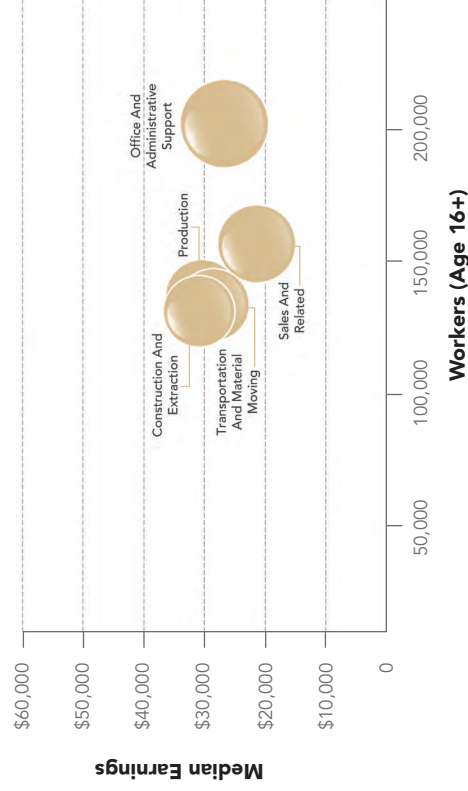
### AVERAGE HOUSEHOLD BUDGET INDEX

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



### OCCUPATION BY EARNINGS

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





## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Purchased a used vehicle in the past year, likely maintaining the vehicle themselves.
- Routinely stop by the convenience store to purchase gas, lottery tickets, and snacks.
- Participate in fishing and hunting.
- Use the Internet to stay connected with friends and play online video games.
- Listen to the radio, especially at work, with a preference for rap, R&B, and country music.
- Enjoy programs on Investigation Discovery, CMT, and Hallmark, typically watching via satellite dish.
- Often prepare quick meals, using packaged or frozen dinner entrees.
- Favorite fast food: burgers and pizza.
- Frequent Walmart Supercenters, Walgreens, dollar stores, K-Mart's, and Big Lots for all their shopping needs (groceries, clothing, pharmacy, etc.).

## 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 Community Survey.



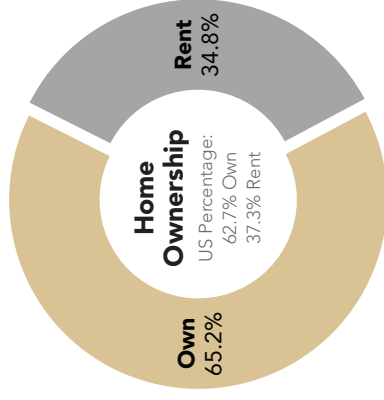
### Typical Housing:

Mobile Homes;  
Single Family

### Median Value:

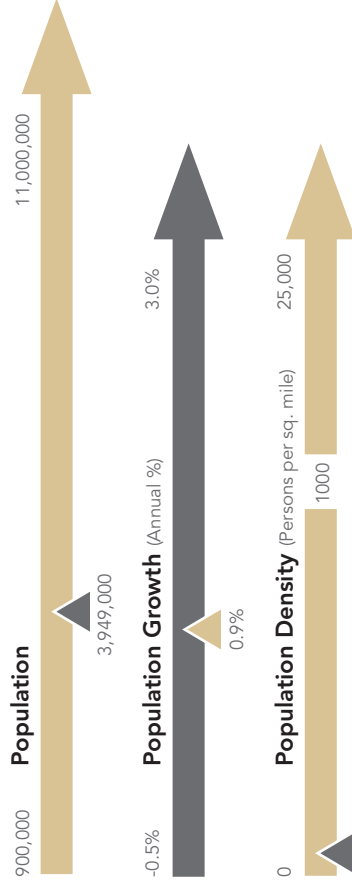
\$89,800

US Median: \$207,300



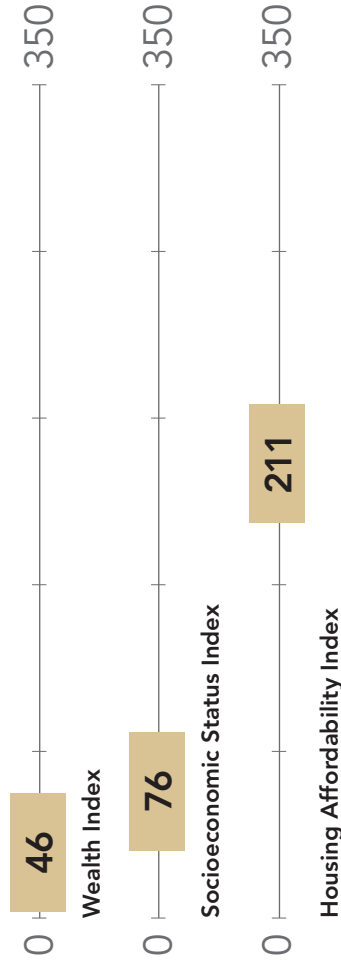
## POPULATION CHARACTERISTICS

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.



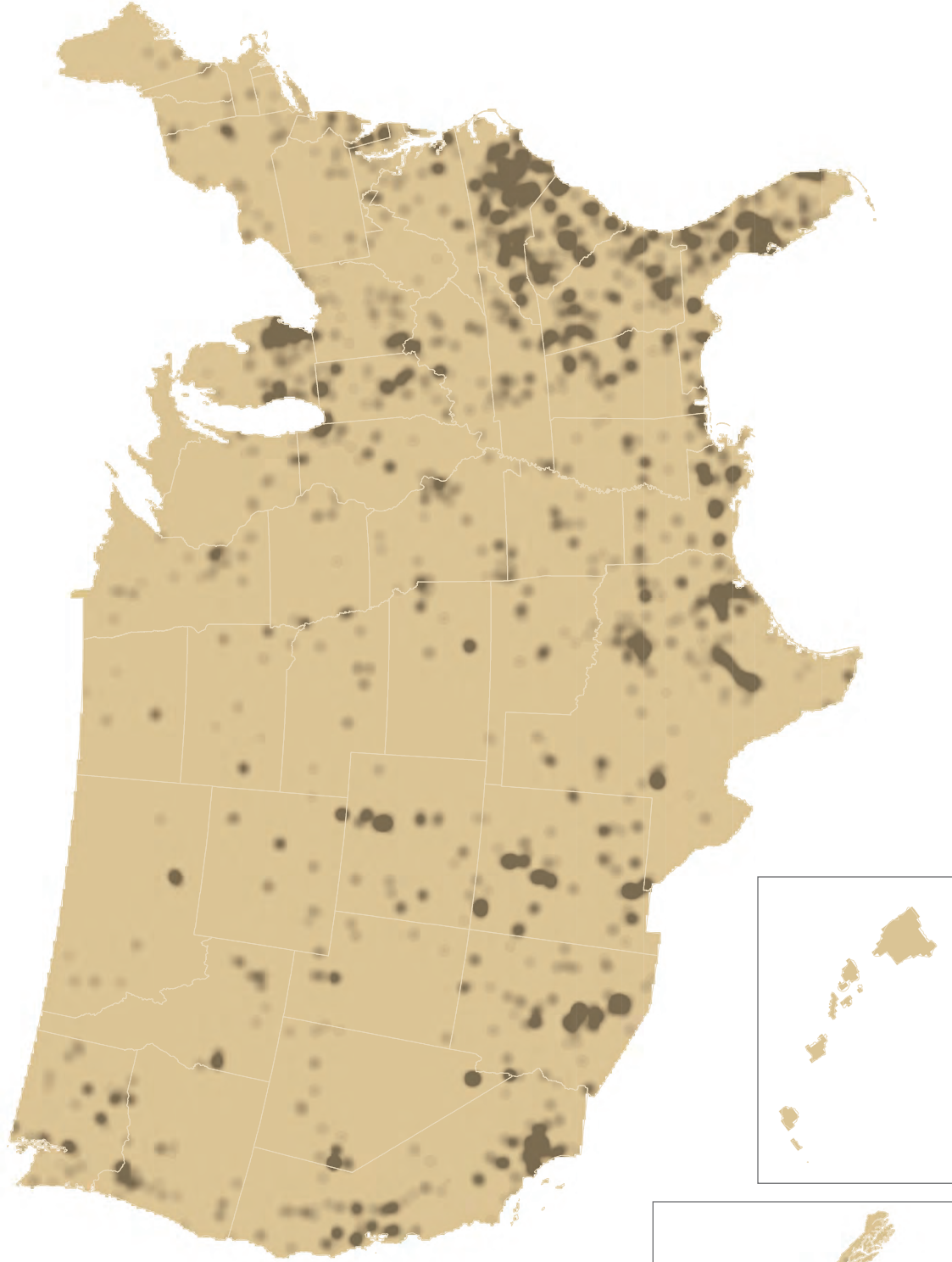
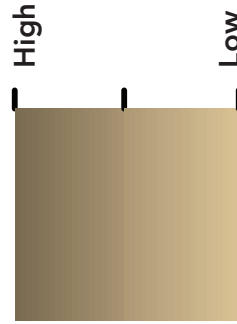
## ESRI INDEXES

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 Down the Road Tapestry Segment by households.





LifeMode Group: Affluent Estates

# Savvy Suburbanites

Households: 3,664,200

Average Household Size: 2.85

Median Age: 45.1

Median Household Income: \$108,700

1D

## WHO ARE WE?

Savvy Suburbanites residents are well educated, well read, and well capitalized. Families include empty nesters and empty nester wannabes, who still have adult children at home. Located in older neighborhoods outside the urban core, their suburban lifestyle includes home remodeling and gardening plus the active pursuit of sports and exercise. They enjoy good food and wine, plus the amenities of the city's cultural events.

## OUR NEIGHBORHOOD

- Established neighborhoods (most built between 1970 and 1990) found in the suburban periphery of large metropolitan markets.
- Married couples with no children or older children; average household size is 2.85.
- 91% owner occupied; 66% mortgaged (Index 160).
- Primarily single-family homes, with a median value of \$362,900 (Index 161).
- Low vacancy rate at 3.8%.

## SOCIOECONOMIC TRAITS

- Education: 50.6% college graduates; 77.6% with some college education.
- Low unemployment at 3.5% (Index 65); higher labor force participation rate at 67.9% (Index 109) with proportionately more 2-worker households at 62.2%, (Index 120).
- Well-connected consumers that appreciate technology and make liberal use of it for everything from shopping and banking to staying current and communicating.
- Informed shoppers that do their research prior to purchasing and focus on quality.



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





LifeMode Group: Affluent Estates

# Savvy Suburbanites

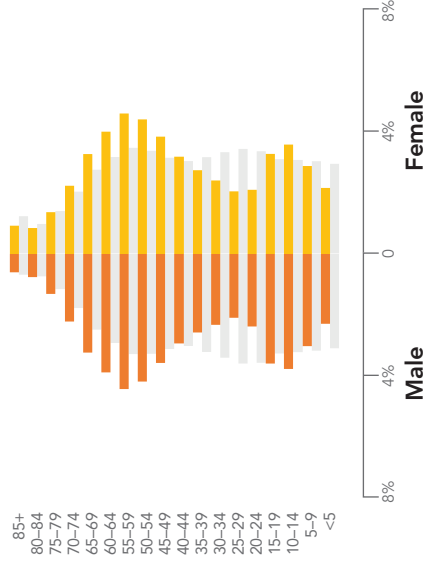


esri.com/tapestry

## AGE BY SEX (Esri data)

**Median Age: 45.1** US: 38.2

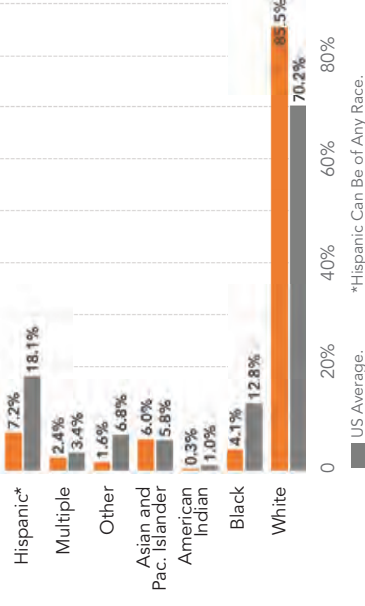
■ Indicates US



## RACE AND ETHNICITY (Esri data)

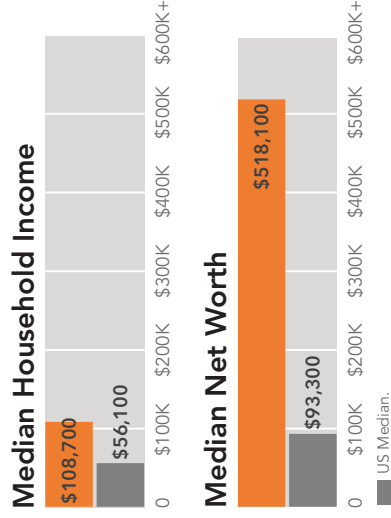
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 36.2** US: 64.0



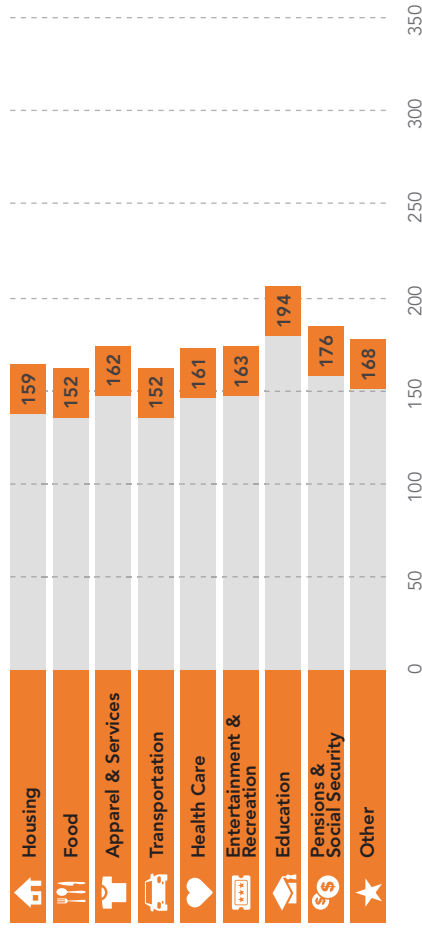
## INCOME AND NET WORTH

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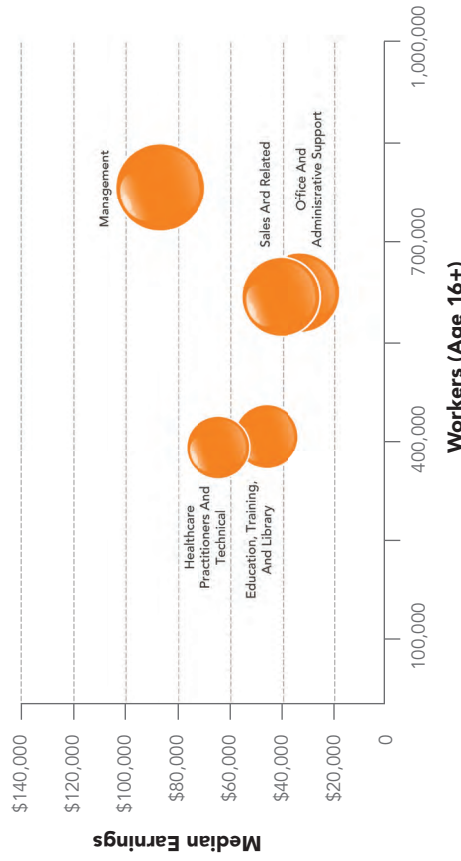
## AVERAGE HOUSEHOLD BUDGET INDEX

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



## OCCUPATION BY EARNINGS

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



## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Residents prefer late model, family-oriented vehicles: SUVs, minivans, and station wagons.
- Gardening and home remodeling are priorities, usually DIY. Riding mowers and power tools are popular, although they also hire contractors for the heavy lifting.
- There is extensive use of housekeeping and personal care services.
- Foodies: They like to cook and prefer natural or organic products.
- These investors are financially active, using a number of resources for informed investing. They are not afraid of debt; many households carry first and second mortgages, plus home equity credit lines.
- Physically fit, residents actively pursue a number of sports, from skiing to golf, and invest heavily in sports gear and exercise equipment.

## 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.



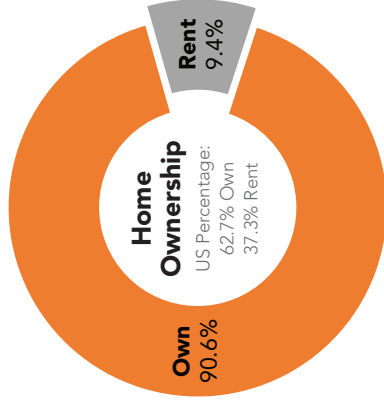
### Typical Housing:

Single Family

### Median Value:

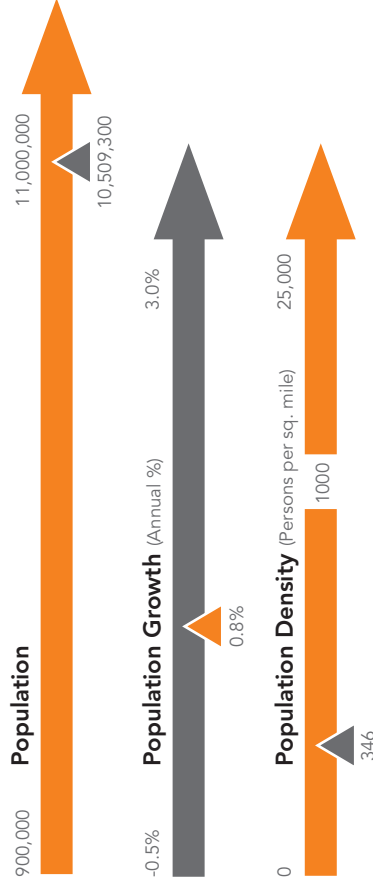
\$362,900

US Median: \$207,300



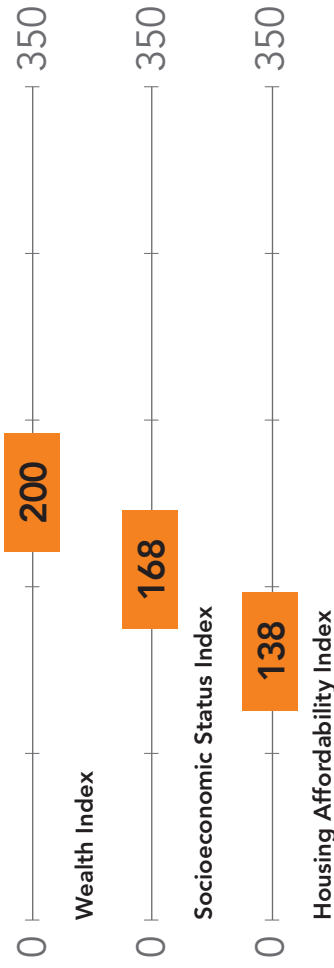
## POPULATION CHARACTERISTICS

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.





LifeMode Group: Affluent Estates

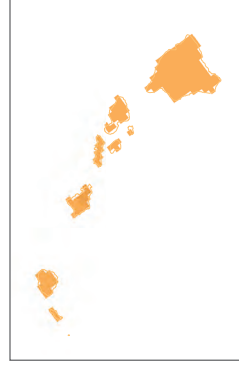
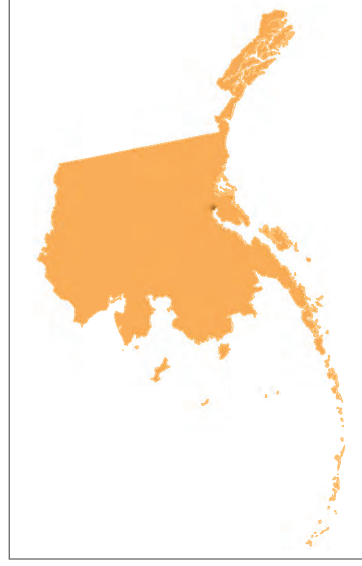
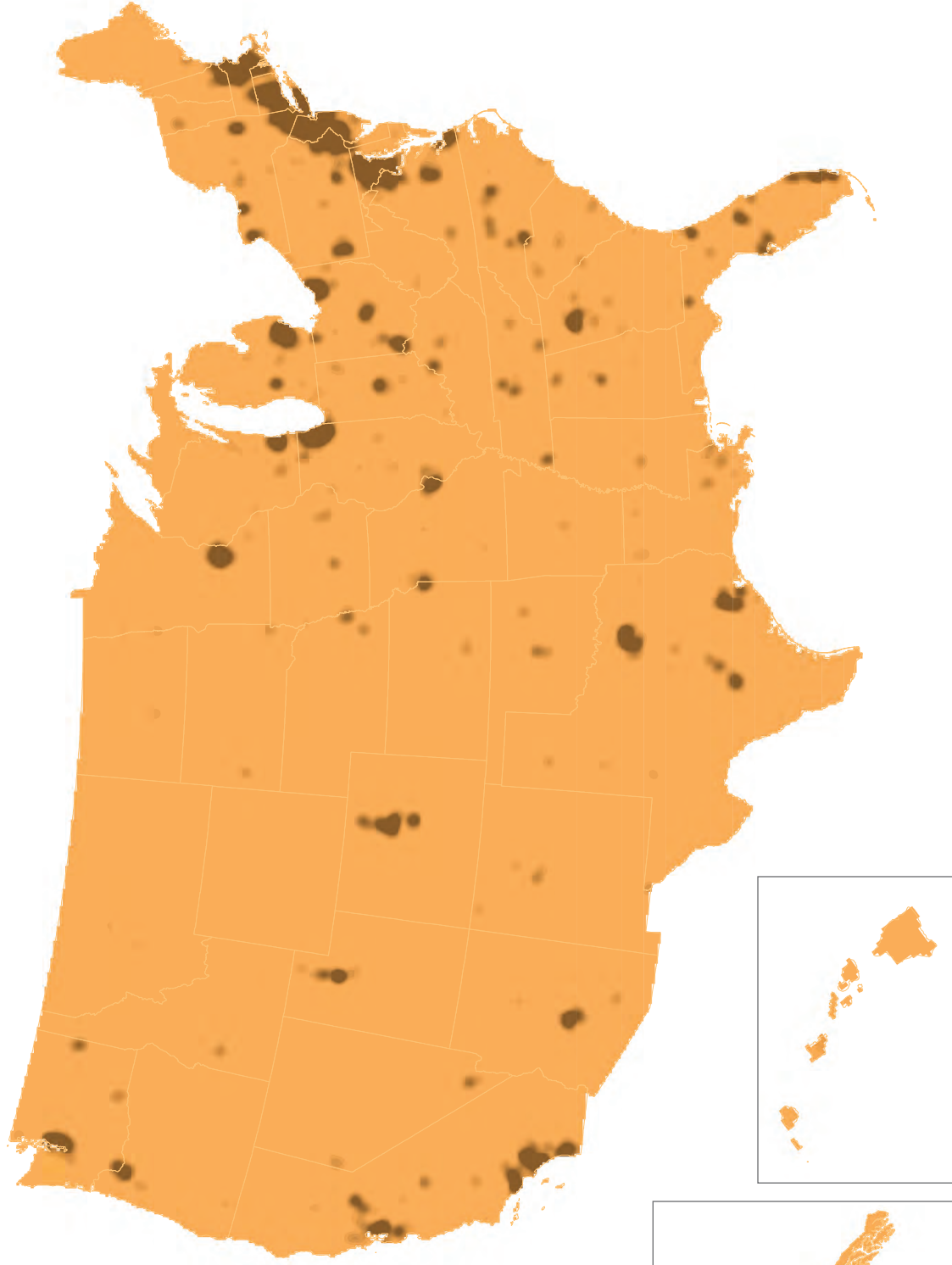
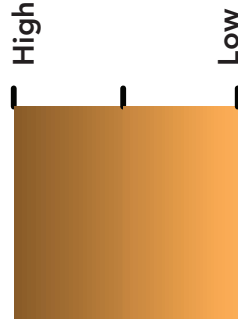
# Savvy Suburbanites



esri.com/tapestry

## SEGMENT DENSITY

This map illustrates the density and distribution of the Savvy Suburbanites Tapestry Segment by households.



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# The Great Outdoors

Households: 1,908,600

Average Household Size: 2.44

Median Age: 47.4

Median Household Income: \$56,400



## WHO ARE WE?

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

## OUR NEIGHBORHOOD

- Over 55% of households are married-couple families; 36% are couples with no children living at home.
- Average household size is slightly smaller at 2.44.
- Typical of areas with rustic appeal, the housing inventory features single-family homes (77%) and mobile homes (15%); a significant inventory of seasonal housing is available (Index 397).
- Residents live in small towns and rural communities throughout the West, South, and Northeast regions of the country.
- More than half of all homes were constructed between 1970 and 2000.
- Most households have one or two vehicles; average travel time to work is slightly higher (28 minutes) despite a disproportionate number that work from home (Index 149).

## SOCIOECONOMIC TRAITS

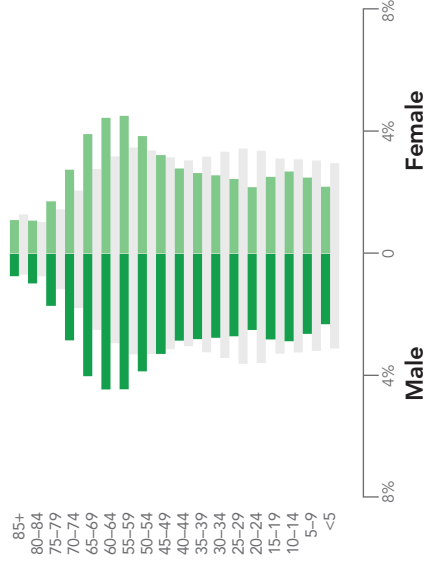
- 60% have attended college or hold a degree.
- Unemployment is lower at 4.8% (Index 88), but so is labor force participation at 60%.
- Typical of neighborhoods with older residents, income from retirement and Social Security is common, but residents also derive income from self-employment and investments.
- Residents are very do-it-yourself oriented and cost conscious.
- Many service their own autos, work on home improvement and remodeling projects, and maintain their own yards.
- They prefer domestic travel to trips abroad.



### AGE BY SEX (Esri data)

Median Age: 47.4 US: 38.2

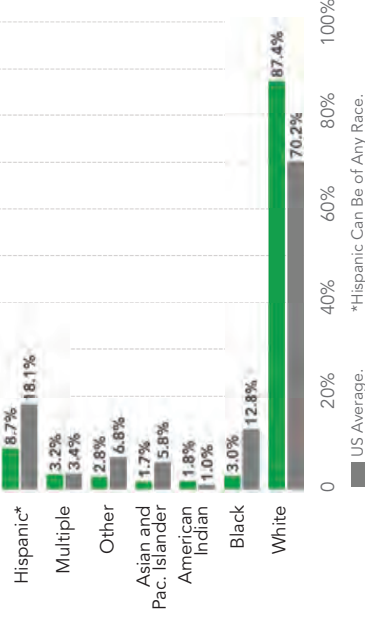
■ Indicates US



### RACE AND ETHNICITY (Esri data)

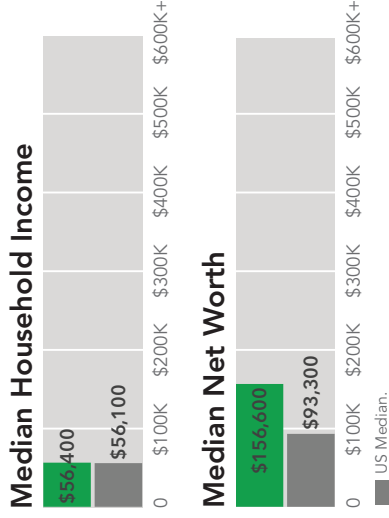
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: 35.6 US: 64.0



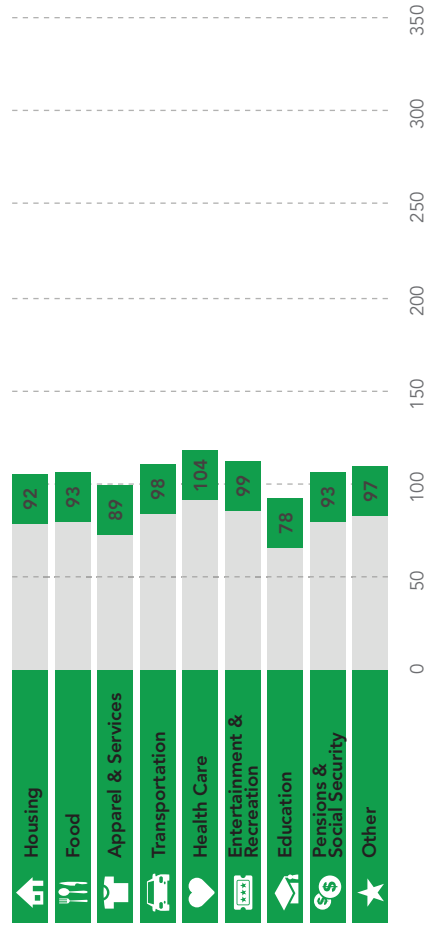
### INCOME AND NET WORTH

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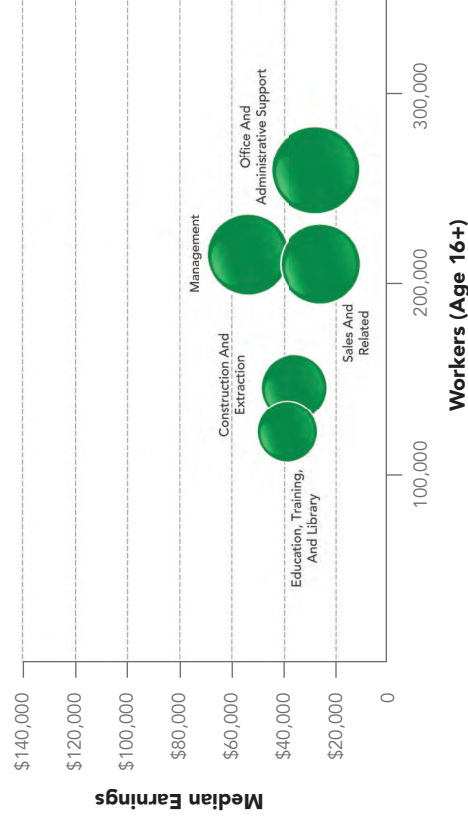
### AVERAGE HOUSEHOLD BUDGET INDEX

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### OCCUPATION BY EARNINGS

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



**MARKET PROFILE**

(Consumer preferences are estimated from data by GfK MRI)

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

**HOUSING**

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.



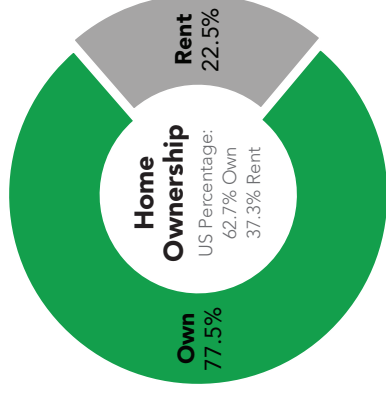
**Typical Housing:**

Single Family

**Median Value:**

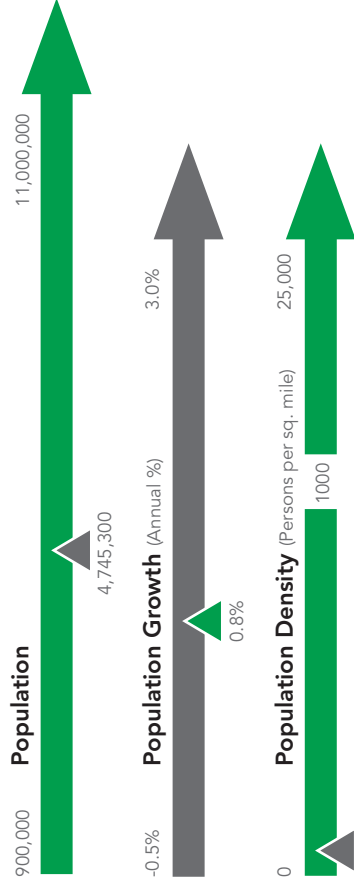
\$239,500

US Median: \$207,300



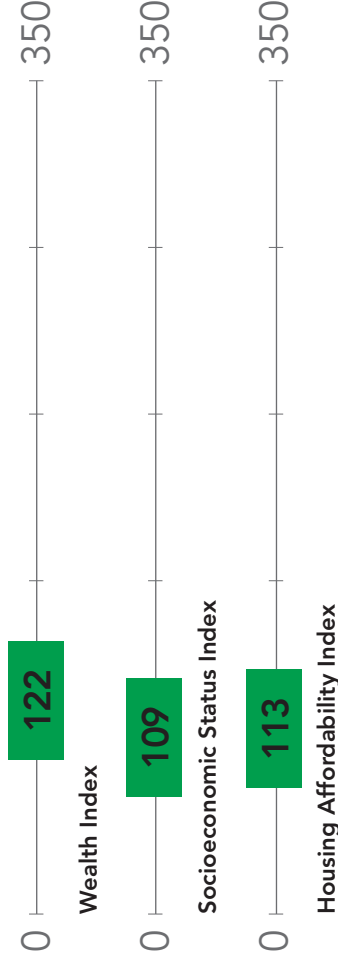
**POPULATION CHARACTERISTICS**

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.



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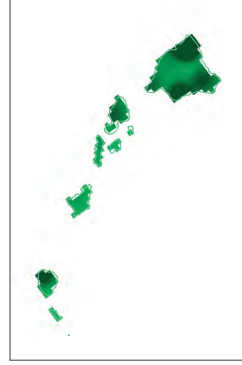
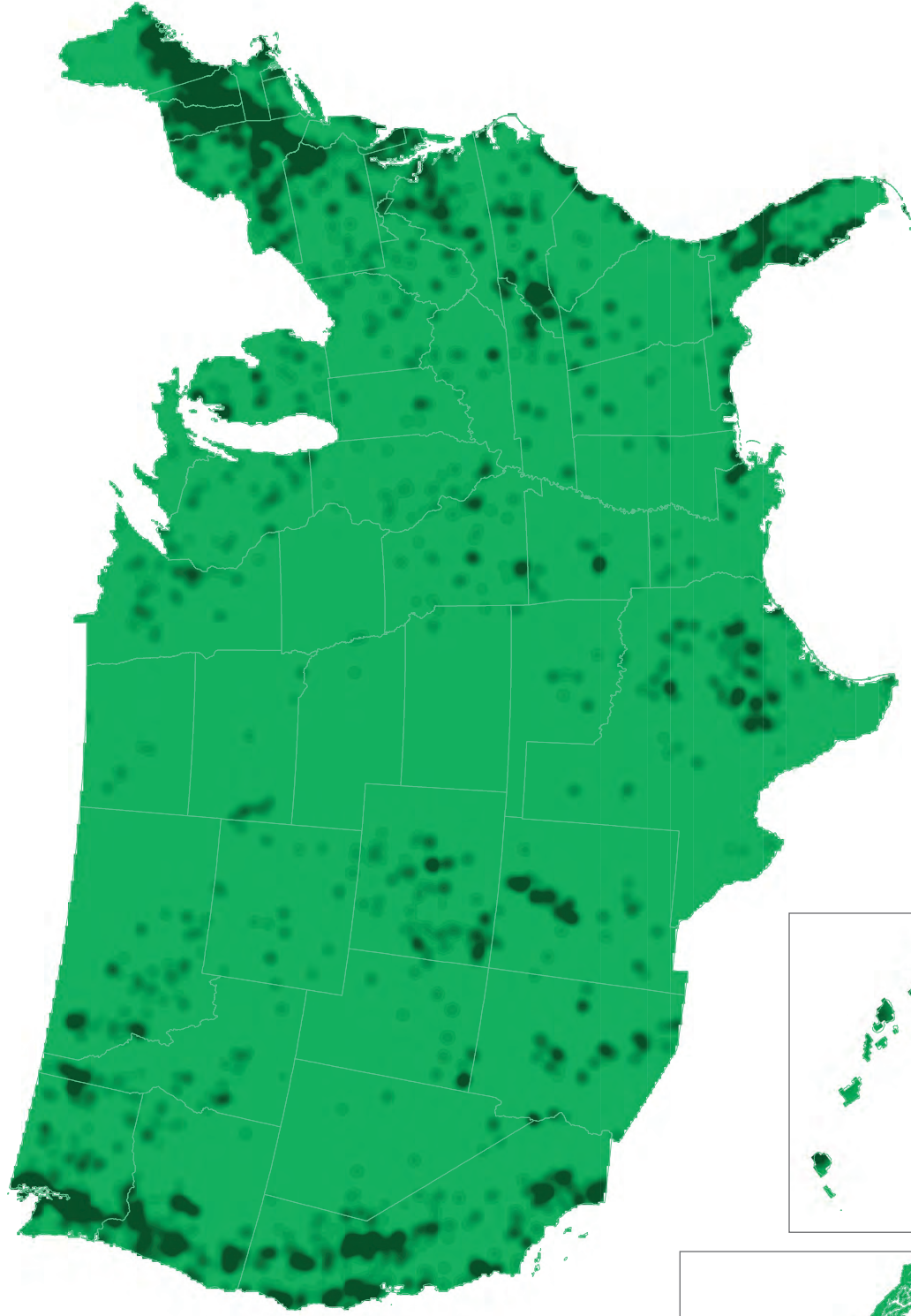
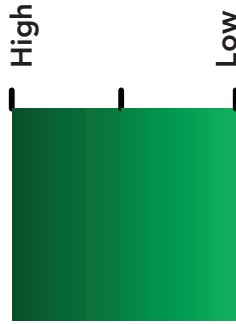


# LifeMode Group: Cozy Country Living The Great Outdoors



## SEGMENT DENSITY

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



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LifeMode Group: Rustic Outposts

# Southern Satellites

10A

Households: 3,856,800

Average Household Size: 2.67

Median Age: 40.3

Median Household Income: \$47,800

## WHO ARE WE?

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

## OUR NEIGHBORHOOD

- About 78% of households are owned.
- Married couples with no children are the dominant household type, with a number of multigenerational households (Index 112).
- Most are single-family homes (67%), with a number of mobile homes (Index 509).
- Most housing units were built in 1970 or later.
- Most households own 1 or 2 vehicles, but owning 3+ vehicles is common (Index 144).

## SOCIOECONOMIC TRAITS

- Education: almost 40% have a high school diploma only (Index 140); 45% have college education (Index 73).
- Unemployment rate is 6%, slightly higher than the US rate.
- Labor force participation rate is 59.1%, slightly lower than the US.
- These consumers are more concerned about cost rather than quality or brand loyalty.
- They tend to be somewhat late in adapting to technology.
- They obtain a disproportionate amount of their information from TV, compared to other media.

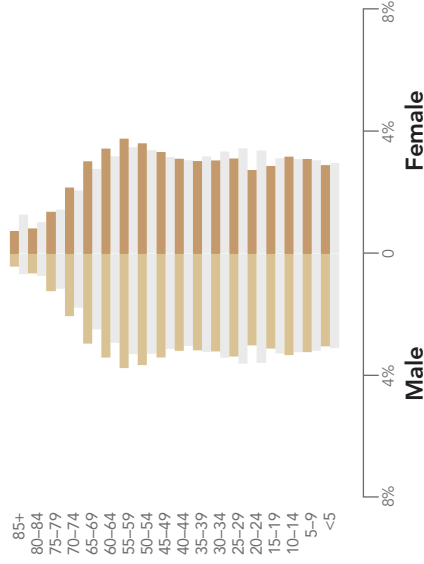


Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

**AGE BY SEX** (Esri data)

**Median Age: 40.3** US: 38.2

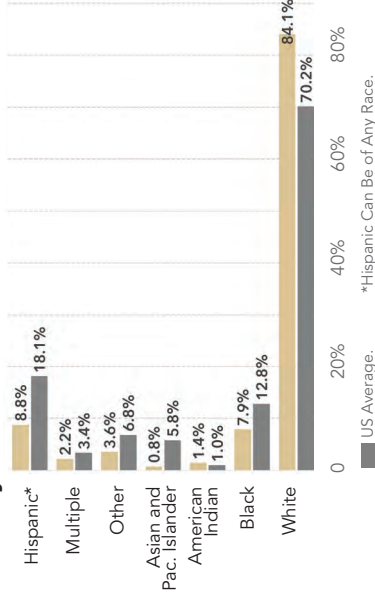
■ Indicates US



**RACE AND ETHNICITY** (Esri data)

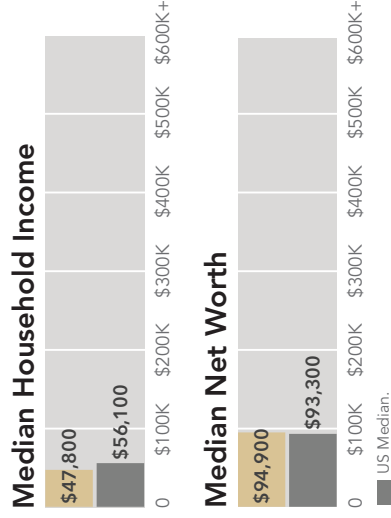
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**Diversity Index: 40.1** US: 64.0



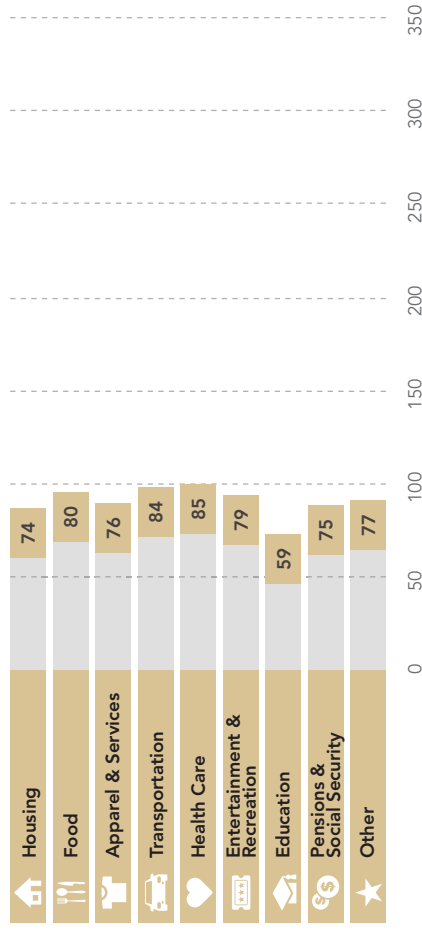
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Net worth measures total household assets (homes, vehicles, investments, etc.) less any debts, secured (e.g., mortgages) or unsecured (credit cards). Household income and net worth are estimated by Esri.



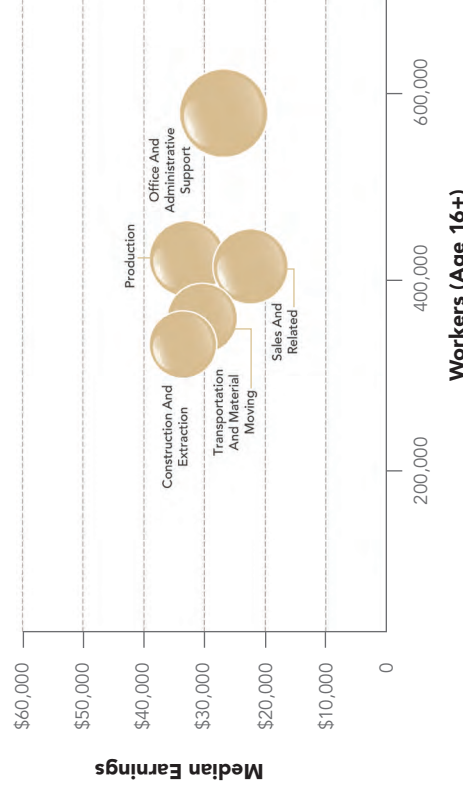
**AVERAGE HOUSEHOLD BUDGET INDEX**

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



**OCCUPATION BY EARNINGS**

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





## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Usually own a truck; likely to service it themselves.
- Frequent the convenience store, usually to fill up a vehicle with gas.
- Typical household has a satellite dish.
- Work on home improvement and remodeling projects.
- Own a pet, commonly a dog.
- Participate in fishing and hunting.
- Prefer to listen to country music and watch Country Music Television (CMT).
- Read fishing/hunting and home service magazines.
- Partial to eating at low-cost family restaurants and drive-ins.
- Use Walmart for all their shopping needs (groceries, clothing, pharmacy, etc.).

## 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 Community Survey.

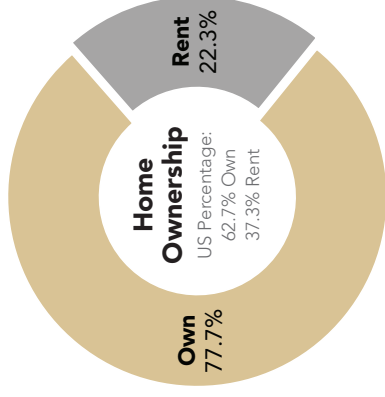


### Typical Housing:

Single Family;  
 Mobile Homes

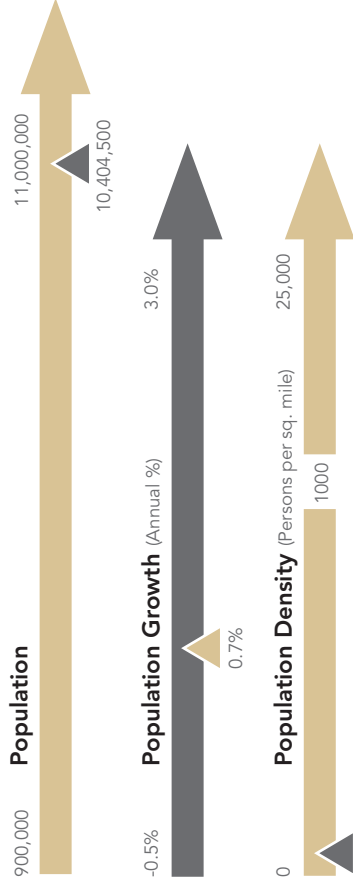
### Median Value:

\$128,500  
 US Median: \$207,300



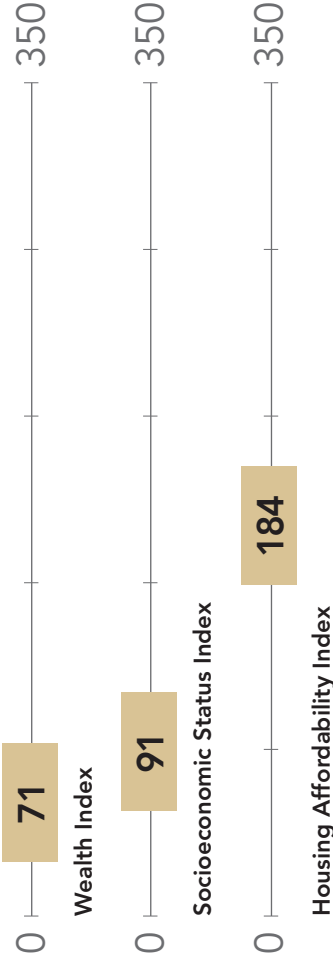
## POPULATION CHARACTERISTICS

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.



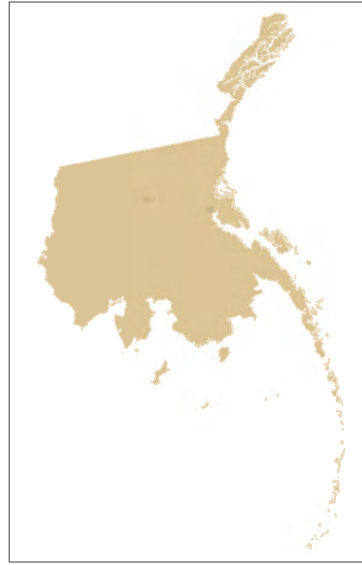
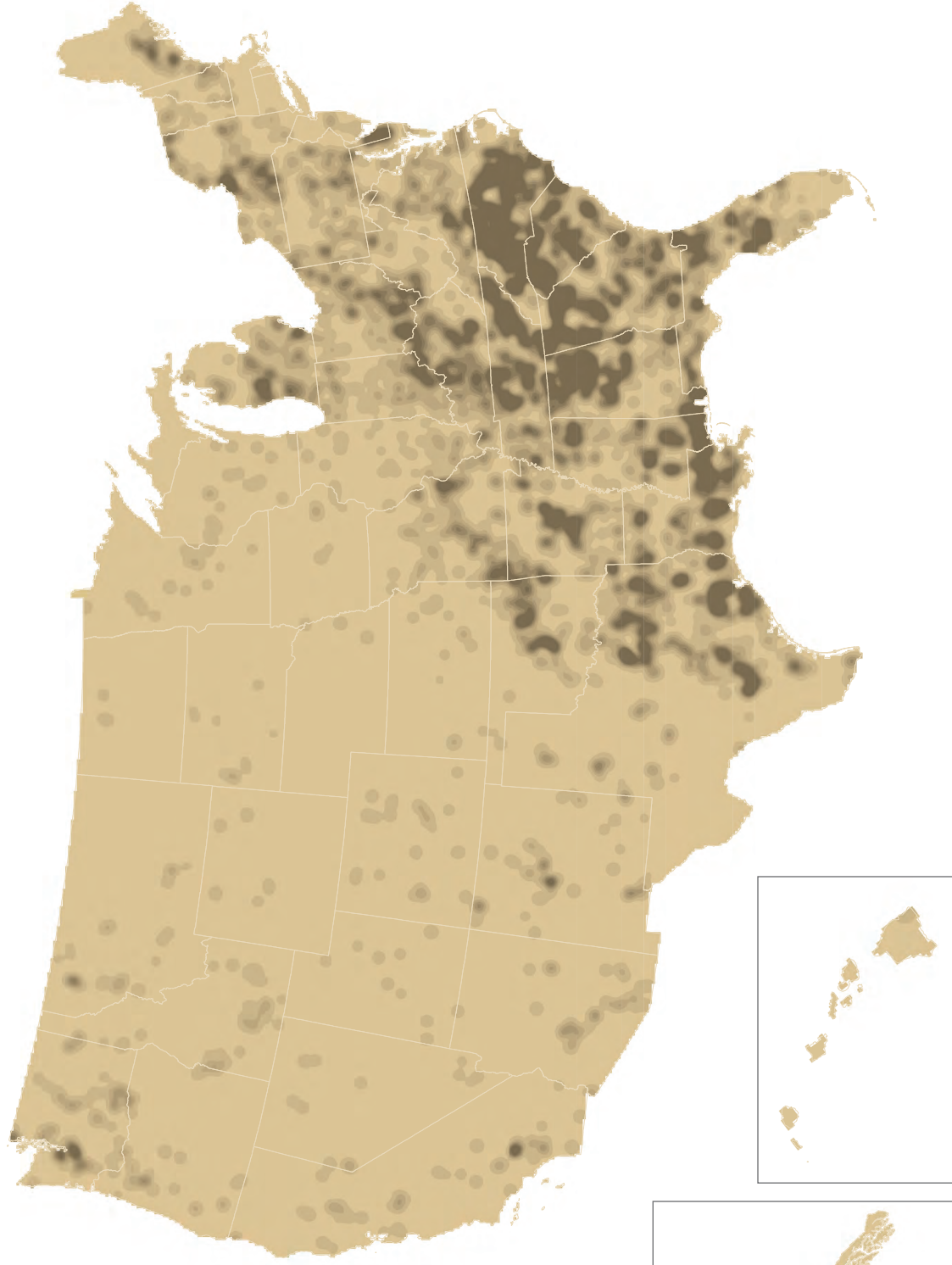
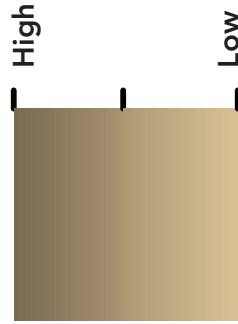
## ESRI INDEXES

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 Southern Satellites Tapestry Segment by households.



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LifeMode Group: Family Landscapes

# Home Improvement

4B

Households: 2,114,500

Average Household Size: 2.88

Median Age: 37.7

Median Household Income: \$72,100



## WHO ARE WE?

Married-couple families occupy well over half of these suburban households. Most *Home Improvement* residences are single-family homes that are owner occupied, with only one-fifth of the households occupied by renters. Education and diversity levels are similar to the US as a whole. These families spend a lot of time on the go and therefore tend to eat out regularly. When at home, weekends are consumed with home improvement and remodeling projects.

## OUR NEIGHBORHOOD

- These are low density suburban neighborhoods.
- Eight of every 10 homes are traditional single-family dwellings, owner occupied.
- Majority of the homes were built between 1970 and 2000.
- More than half of the households consist of married-couple families; another 12% include single-parent families.

## SOCIOECONOMIC TRAITS

- Higher participation in the labor force and lower unemployment than US levels; most households have 2+ workers.
- Cautious consumers that do their research before buying, they protect their investments.
- Typically spend 4–7 hours per week commuting, and, therefore, spend significant amounts on car maintenance (performed at a department store or auto repair chain store).
- They are paying off student loans and home mortgages.
- They spend heavily on eating out, at both fast-food and family restaurants.
- They like to work from home, when possible.



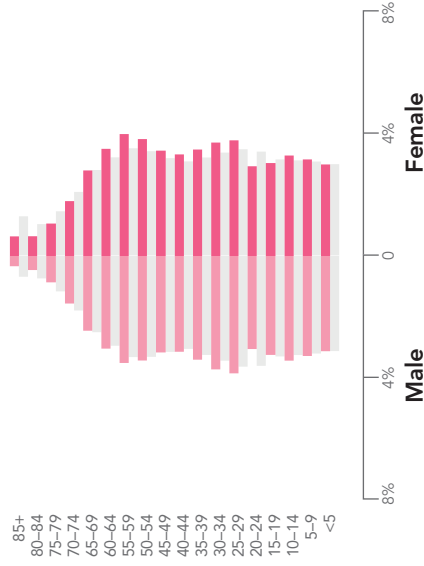
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



### AGE BY SEX (Esri data)

Median Age: **37.7** US: 38.2

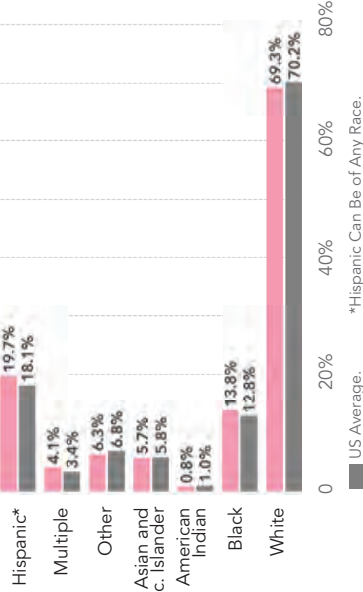
■ Indicates US



### 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).

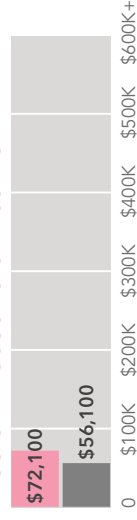
Diversity Index: **65.7** US: 64.0



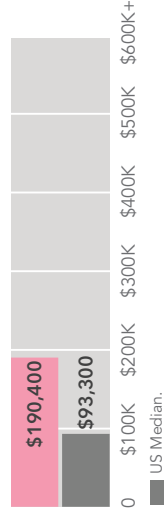
### INCOME AND NET WORTH

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

#### Median Household Income

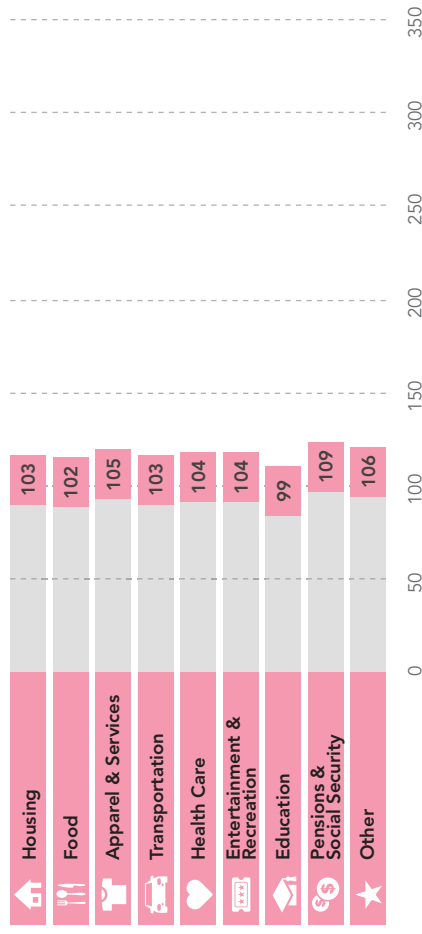


#### Median Net Worth



### AVERAGE HOUSEHOLD BUDGET INDEX

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



### OCCUPATION BY EARNINGS

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



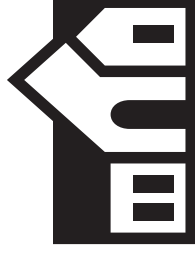
## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Enjoy working on home improvement projects and watching DIY networks.
- Make frequent trips to warehouse/club and home improvement stores in their minivan or SUV.
- Own a giant screen TV with fiber-optic connection and premium cable; rent DVDs from Redbox or Netflix.com.
- Very comfortable with new technology; embrace the convenience of completing tasks on a mobile device.
- Enjoy dining at Chili's, Chick-fil-A, and KFC.
- Frequently buy children's clothes and toys.

## 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.



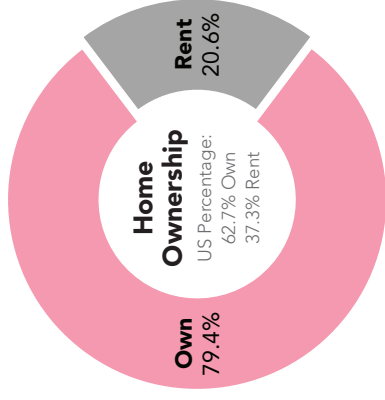
### Typical Housing:

Single Family

### Median Value:

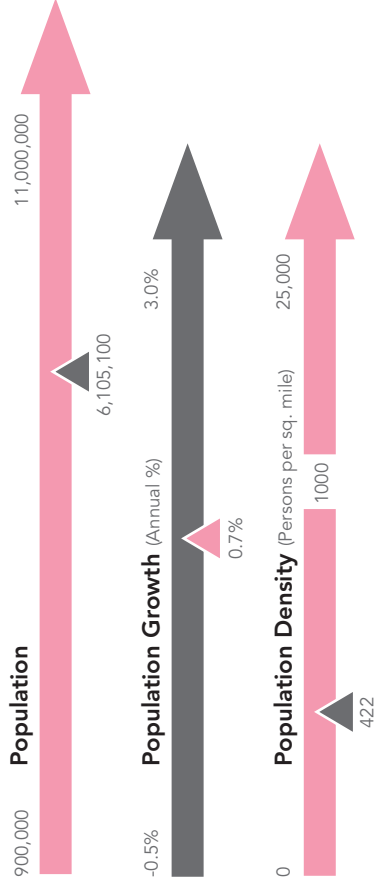
\$192,600

US Median: \$207,300



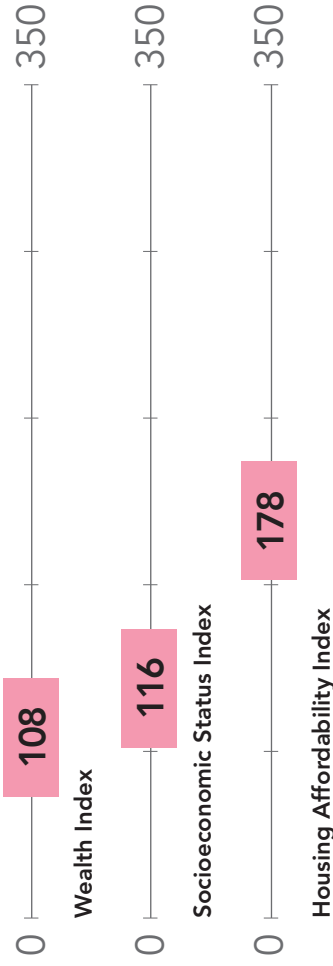
## POPULATION CHARACTERISTICS

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.



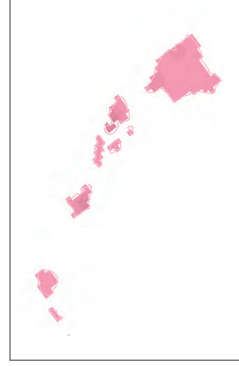
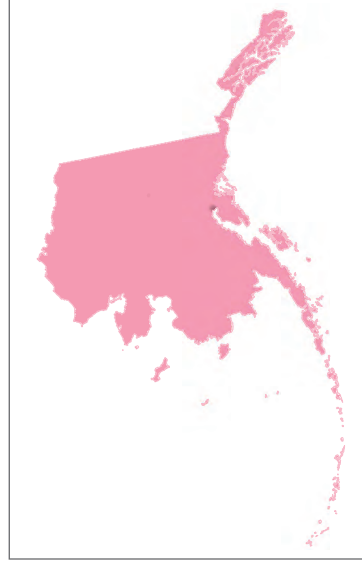
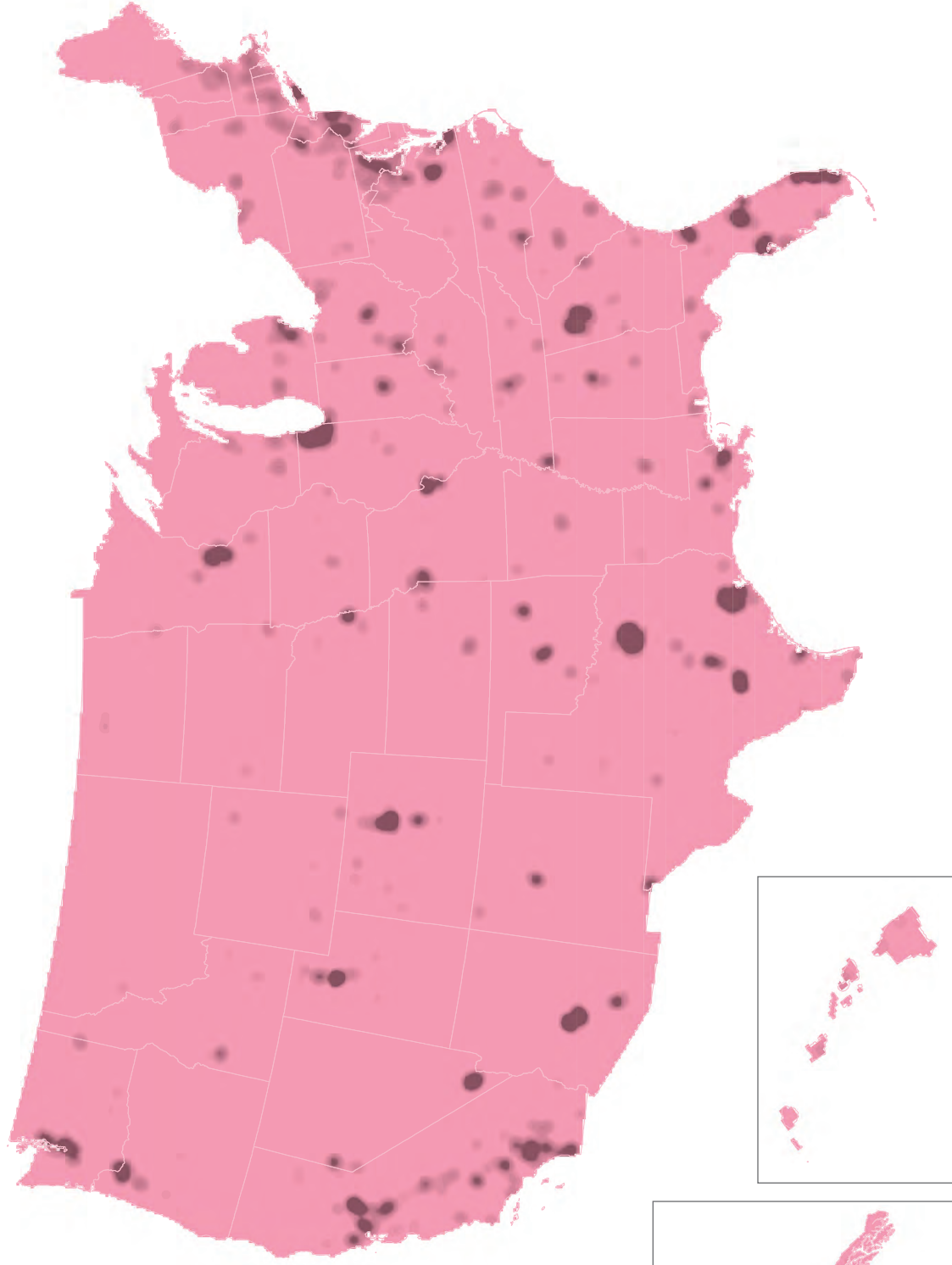
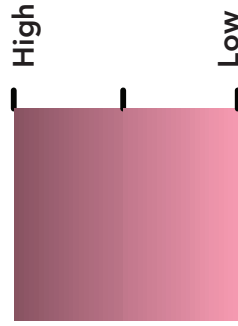
## ESRI INDEXES

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 *Home Improvement* Tapestry Segment by households.



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# LifeMode Group: Affluent Estates Top Tier

Households: 2,113,000

Average Household Size: 2.84

Median Age: 47.3

Median Household Income: \$173,200



1A

## 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 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.

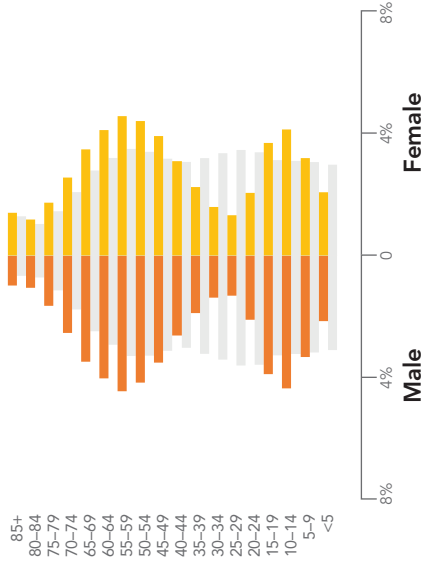


Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

### AGE BY SEX (Esri data)

Median Age: **47.3** US: 38.2

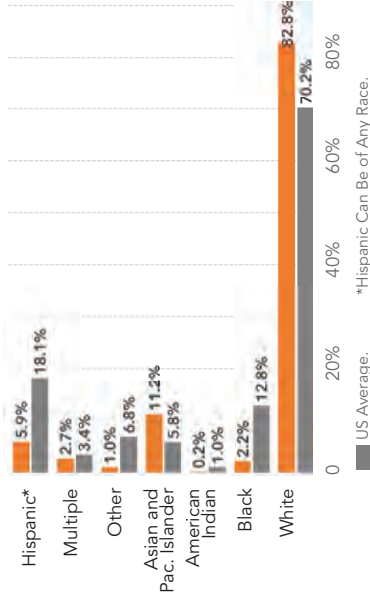
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### RACE AND ETHNICITY (Esri data)

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).

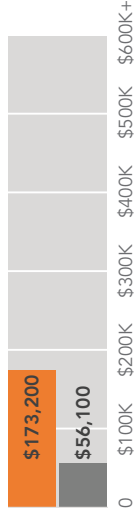
Diversity Index: **37.9** US: 64.0



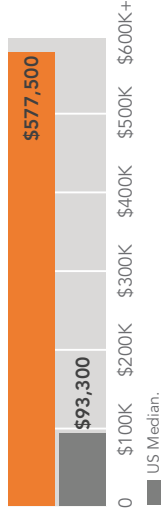
### INCOME AND NET WORTH

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

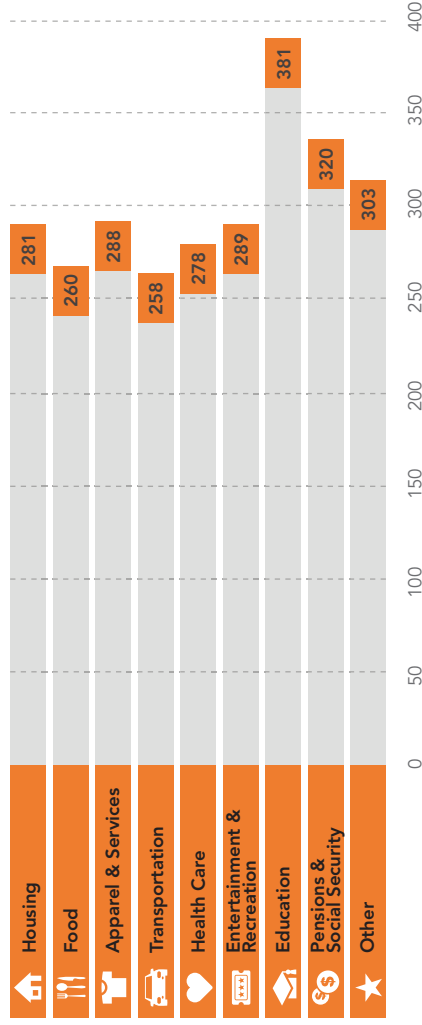


#### Median Net Worth



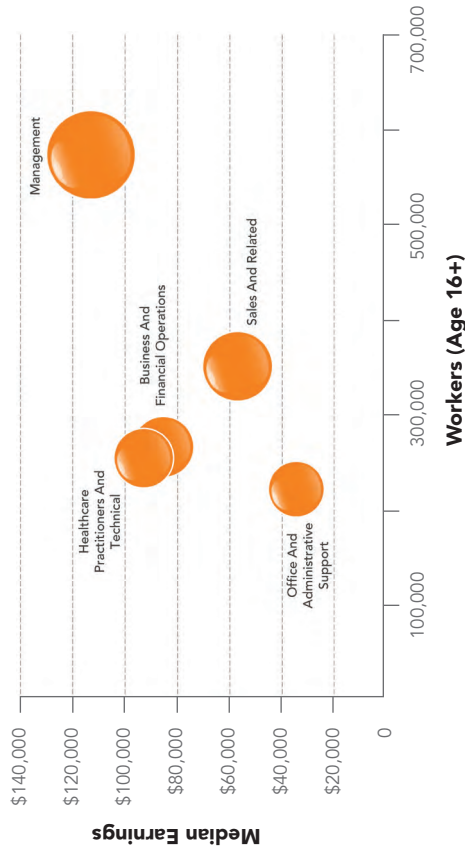
### AVERAGE HOUSEHOLD BUDGET INDEX

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 GfK MRI)

- They purchase or lease luxury cars with the latest trim, preferably imports.
- They contribute to arts/cultural organizations, educational and social groups, as well as NPR and PBS.
- Top Tier residents farm out their household chores—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.
- Top Tier consumers are shoppers. They shop at high-end retailers such as Nordstrom (readily paying full price), as well as Target, Kohl's, Macys, 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.



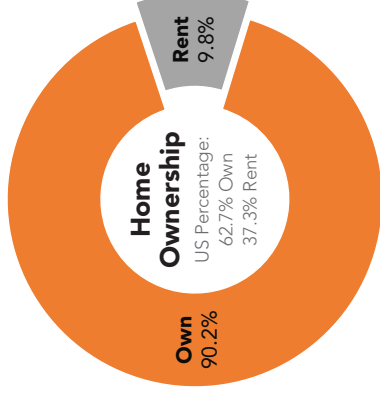
### Typical Housing:

Single Family

### Median Value:

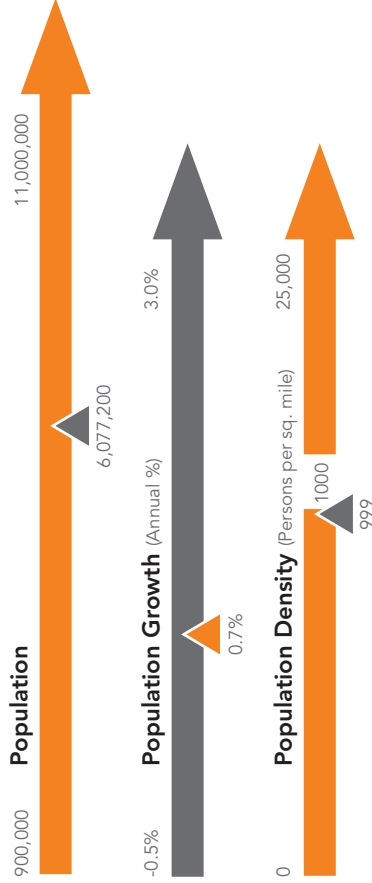
\$819,500

US Median: \$207,300



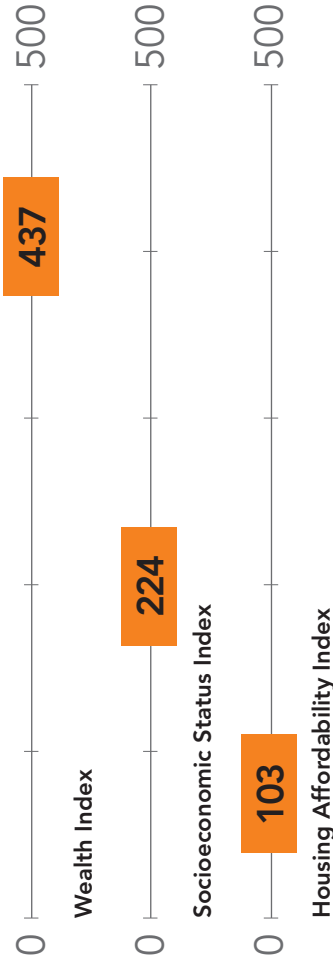
## POPULATION CHARACTERISTICS

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.





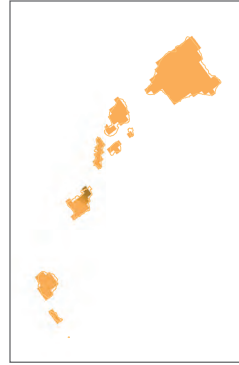
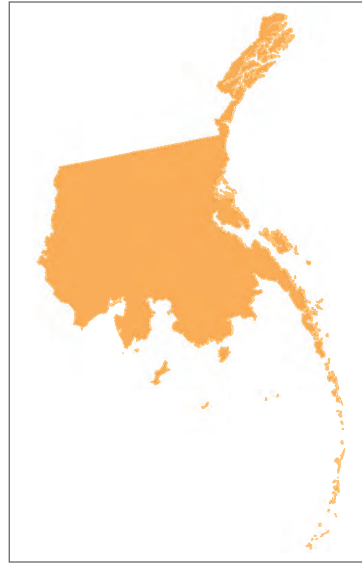
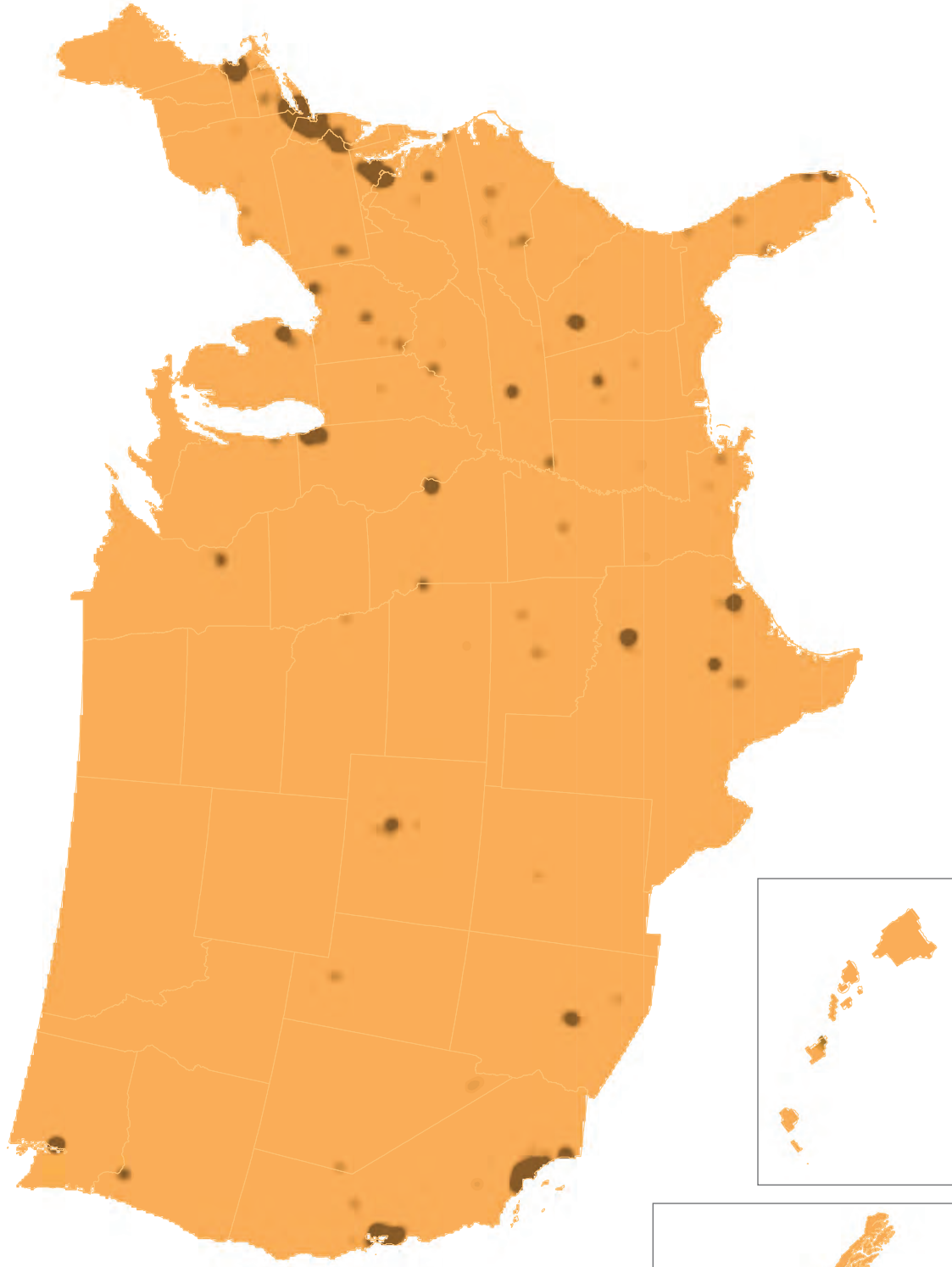
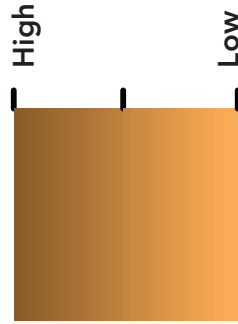


# LifeMode Group: Affluent Estates Top Tier



## SEGMENT DENSITY

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



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LifeMode Group: Middle Ground

# Old and Newcomers

8F

Households: 2,859,200

Average Household Size: 2.12

Median Age: 39.4

Median Household Income: \$44,900



## WHO ARE WE?

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

## OUR NEIGHBORHOOD

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

## SOCIOECONOMIC TRAITS

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

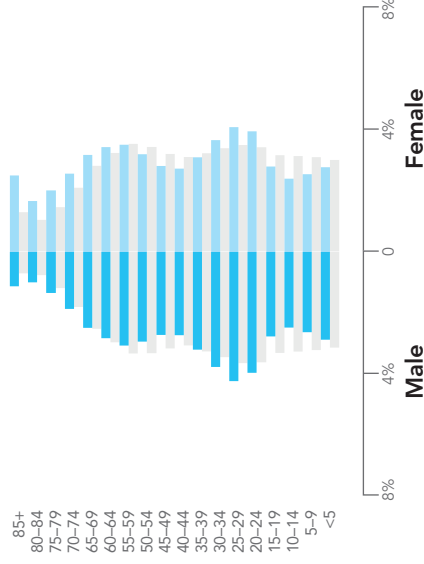


Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

## AGE BY SEX (Esri data)

**Median Age: 39.4** US: 38.2

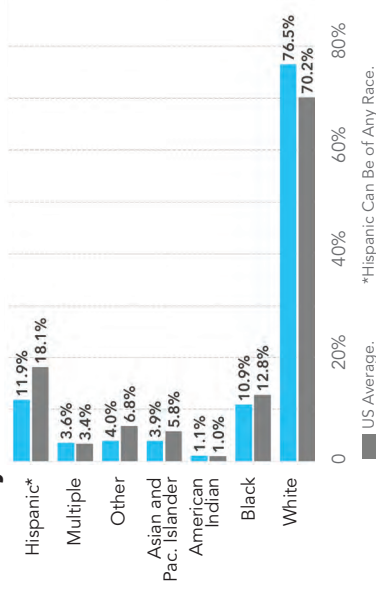
■ Indicates US



## RACE AND ETHNICITY (Esri data)

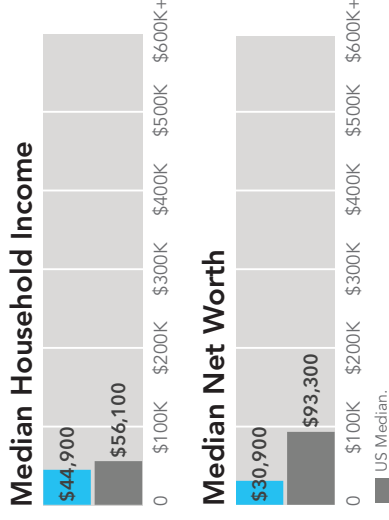
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 52.7** US: 64.0



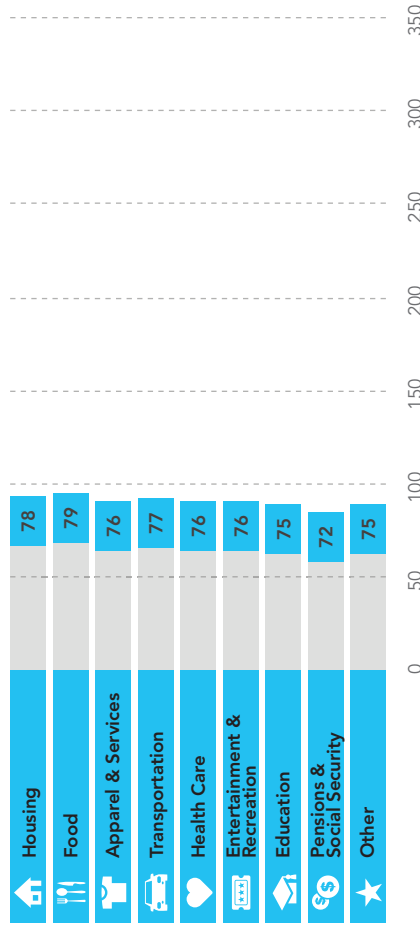
## INCOME AND NET WORTH

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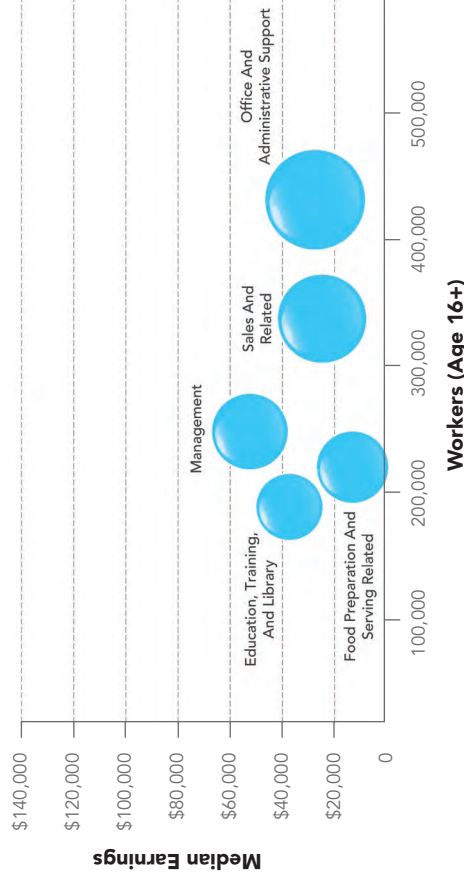
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## OCCUPATION BY EARNINGS

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





## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

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

## HOUSING

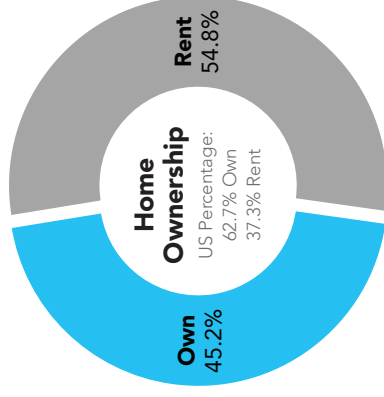
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family;  
Multi-Units

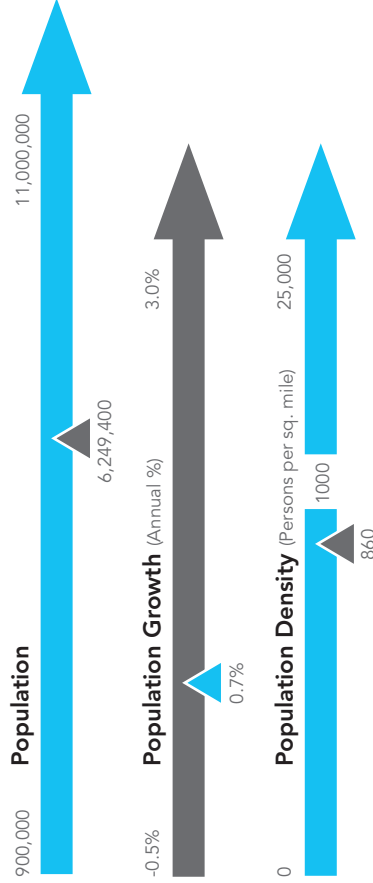
**Average Rent:**  
\$880

US Average: \$1,038



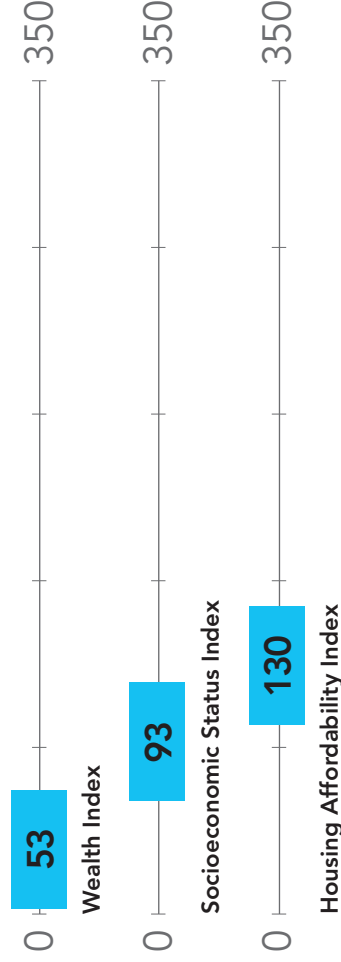
## POPULATION CHARACTERISTICS

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## ESRI INDEXES

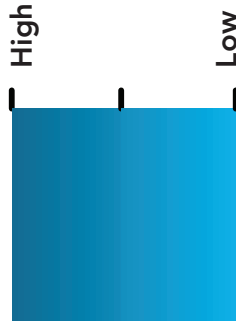
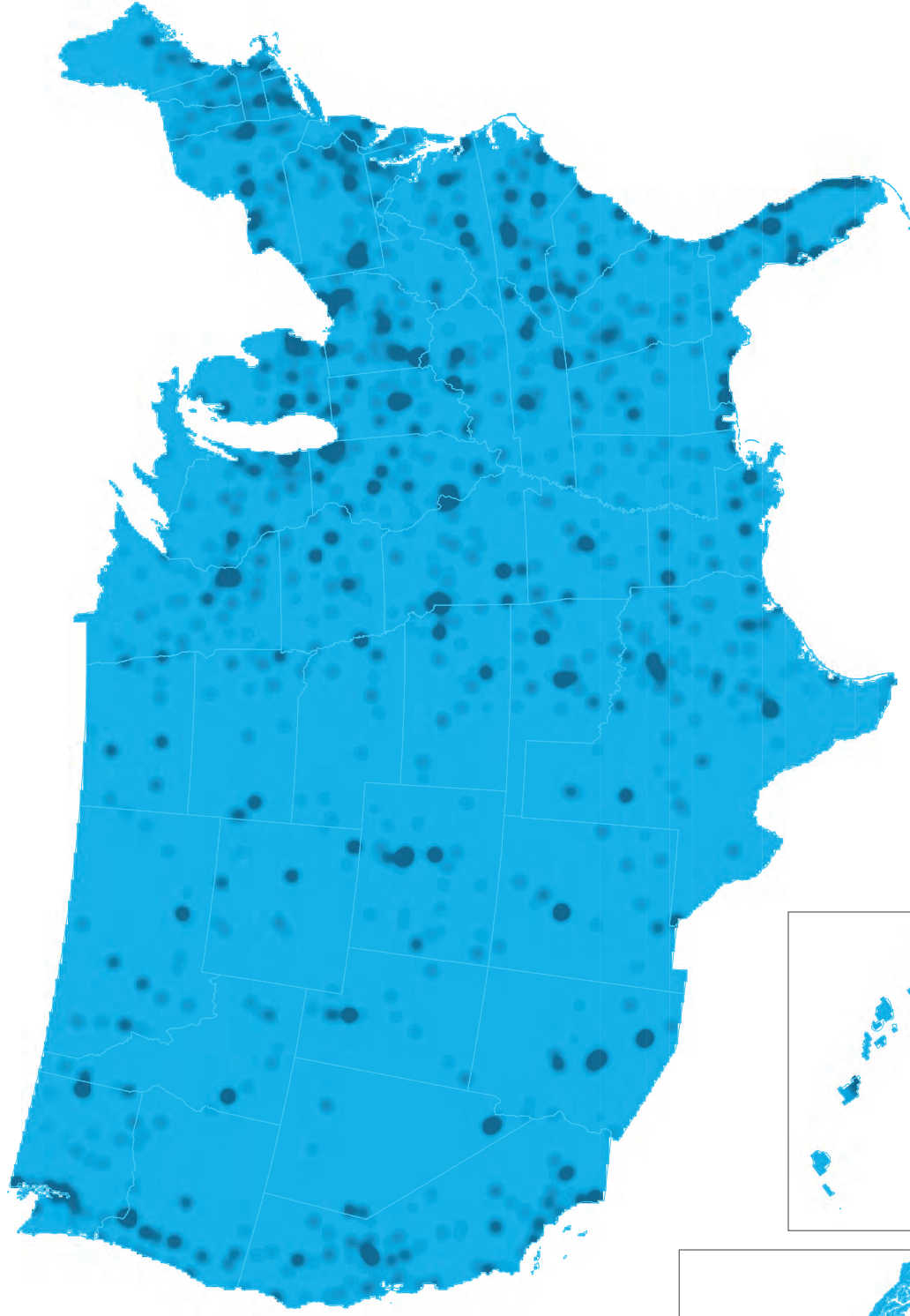
Esri developed three indexes to display average household wealth, socioeconomic status, and housing affordability for the market relative to US standards.



# Old and Newcomers

## SEGMENT DENSITY

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



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LifeMode Group: Middle Ground

# Front Porches

8E

Households: 1,960,300

Average Household Size: 2.57

Median Age: 34.9

Median Household Income: \$43,700



## WHO ARE WE?

Front Porches blends household types, with more young families with children or single households than average. This group is also more diverse than the US. More than half of householders are renters, and many of the homes are older town homes or duplexes. Friends and family are central to Front Porches residents and help to influence household buying decisions. Households tend to own just one vehicle but used only when needed. Income and net worth of these residents are well below the US average.

## OUR NEIGHBORHOOD

- Nearly one in five homes is a duplex, triplex, or quad; half are older single-family dwellings.
- Just over half the homes are occupied by renters.
- Older, established neighborhoods; three quarters of all homes were built before 1980.
- Single-parent families or singles living alone make up almost half of the households.

## SOCIOECONOMIC TRAITS

- Composed of a blue-collar work force with a strong labor force participation rate, but unemployment is slightly high at 7.1%.
- Price is more important than brand names or style to these consumers.
- With limited incomes, these are not adventurous shoppers.
- They would rather cook a meal at home than dine out.
- They seek adventure and strive to have fun.



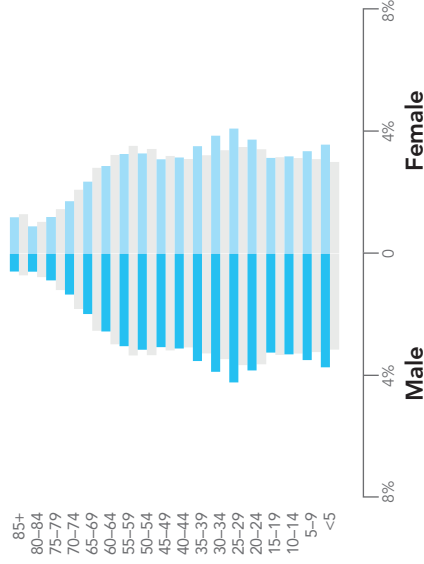
Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.



### AGE BY SEX (Esri data)

Median Age: **34.9** US: 38.2

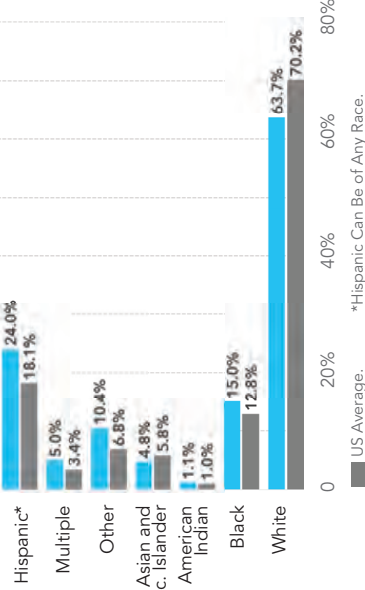
■ Indicates US



### RACE AND ETHNICITY (Esri data)

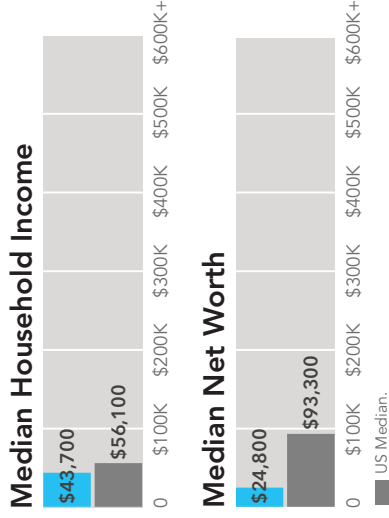
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **72.7** US: 64.0



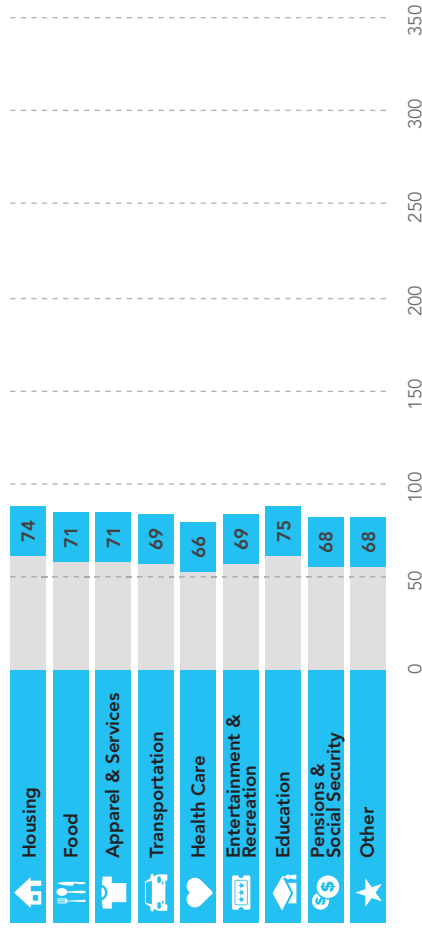
### INCOME AND NET WORTH

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.



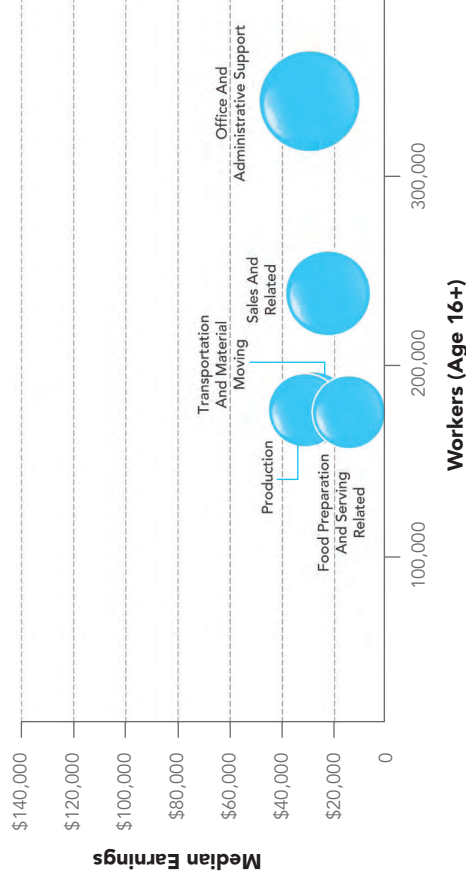
### AVERAGE HOUSEHOLD BUDGET INDEX

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



### OCCUPATION BY EARNINGS

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



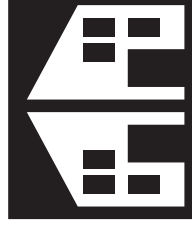
## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Go online for gaming, watching movies, employment searches, and posting pics on social media.
- Prefer cellphones over landlines, and use their mobile devices for entertainment such as streaming movies and music.
- Drink energy and sports drinks.
- Participate in leisure activities including sports, playing board games and video games.
- Watch Comedy Central, Nickelodeon, and PBS Kids Sprout.

## HOUSING

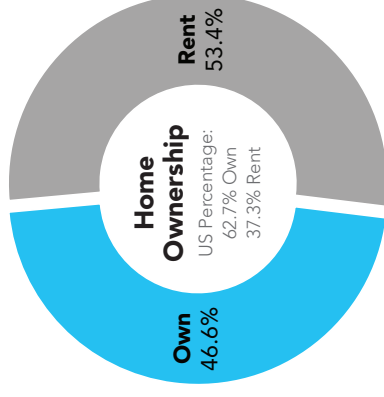
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family;  
Multi-Units

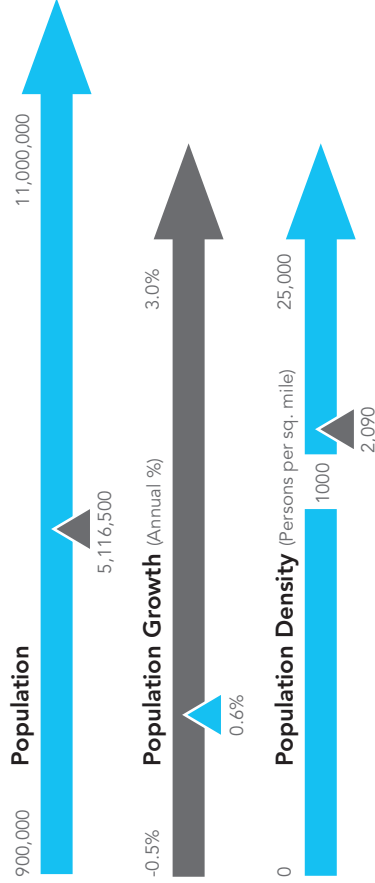
**Average Rent:**  
\$913

US Average: \$1,038



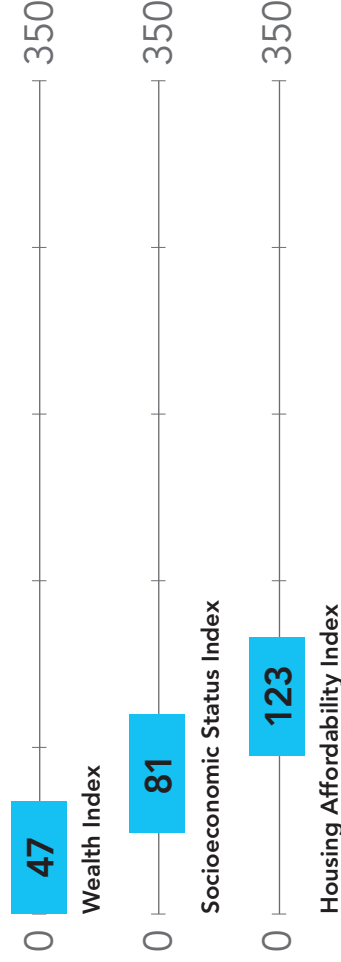
## POPULATION CHARACTERISTICS

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.



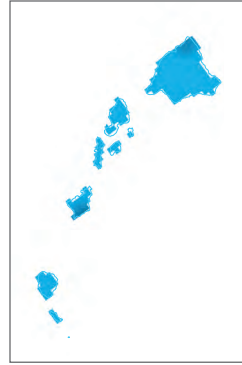
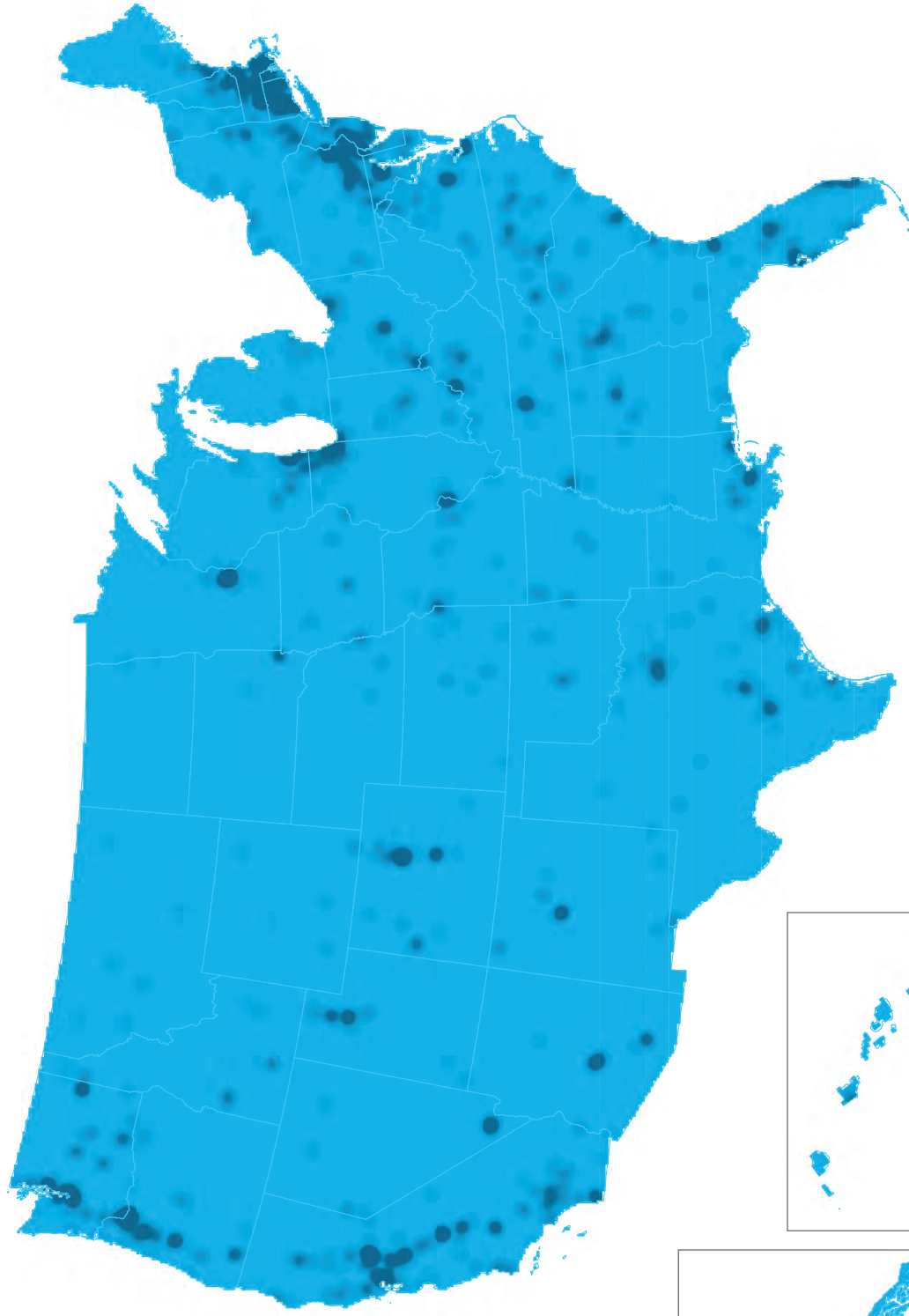
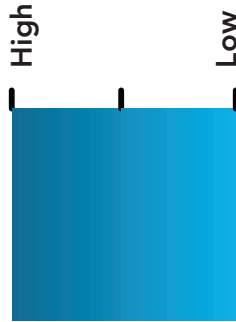


# LifeMode Group: Middle Ground Front Porches



## SEGMENT DENSITY

This map illustrates the density and distribution of the *Front Porches* Tapestry Segment by households.



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# LifeMode Group: Midtown Singles City Commons

Households: 1,106,600

Average Household Size: 2.67

Median Age: 28.5

Median Household Income: \$18,300

11E

## WHO ARE WE?

This segment is one of Tapestry's youngest markets, primarily comprised of single-parent and single-person households living within large, metro cities. While more than a third have a college degree or spent some time in college, nearly a quarter have not finished high school, which has a profound effect on their economic circumstance. However, that has not dampened their aspiration to strive for the best for themselves and their children.

## 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 are found in large metropolitan cities, where most residents rent apartments in midrise buildings.
- Neighborhoods are older, built before 1960 (Index 151), with high vacancy rates.
- 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.
- Unemployment is very high at 16% (Index 295); labor force participation is low at 53% (Index 84).
- Most households receive income from wages or salaries, but nearly one in four receive contributions from Social Security (Index 287) and public assistance (Index 355).
- Consumers endeavor to keep up with the latest fashion trends.
- Most families prefer the convenience of fast-food restaurants to cooking at home.

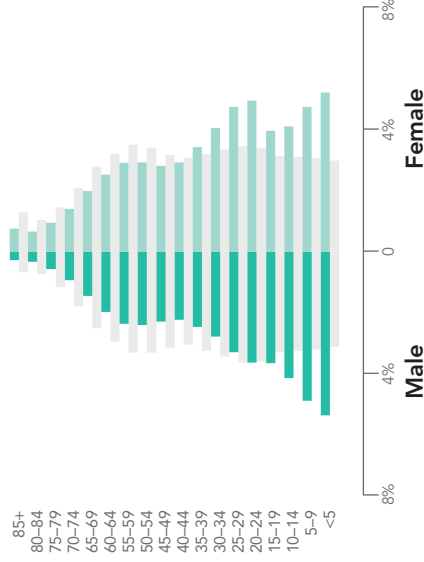


Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

### AGE BY SEX (Esri data)

Median Age: **28.5** US: 38.2

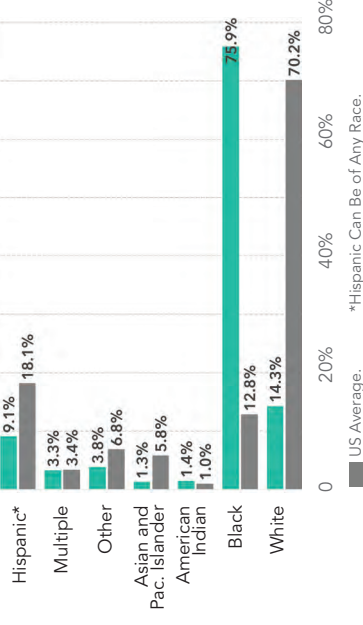
■ Indicates US



### RACE AND ETHNICITY (Esri data)

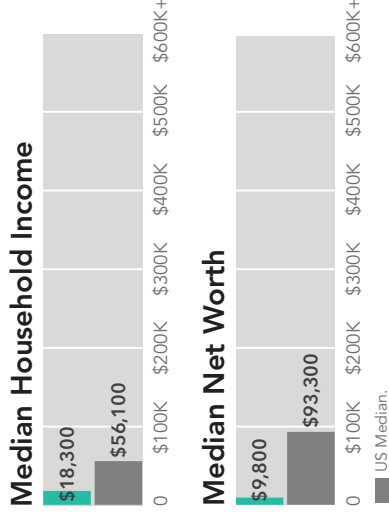
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **50.2** US: 64.0



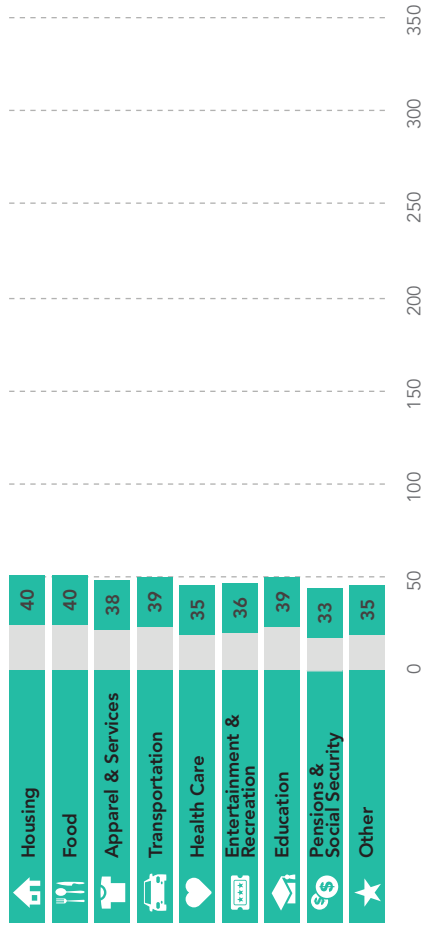
### INCOME AND NET WORTH

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.



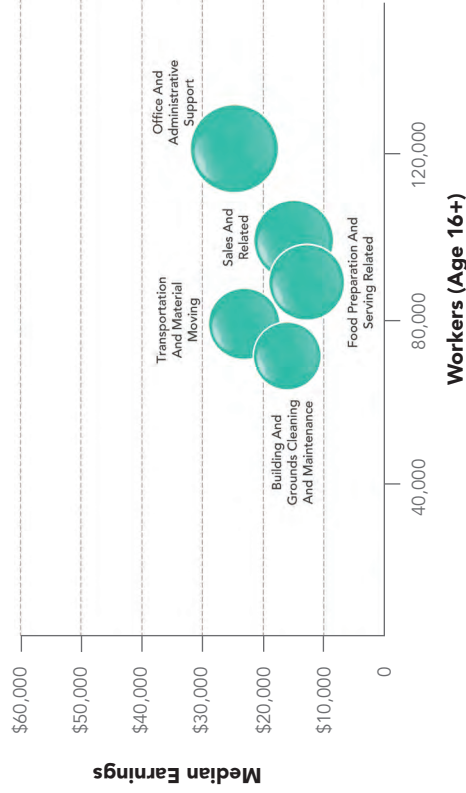
### AVERAGE HOUSEHOLD BUDGET INDEX

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



### OCCUPATION BY EARNINGS

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



## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Baby and children's products, like food and clothing, are the primary purchases.
- They shop primarily at warehouse clubs like Sam's Club, WalMart Super Centers, 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.
- They 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.
- They enjoy listening to urban radio.

## HOUSING

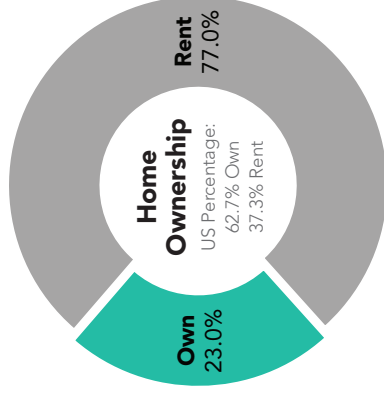
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Community Survey.



**Typical Housing:**  
Multi-Unit Rentals;  
Single Family

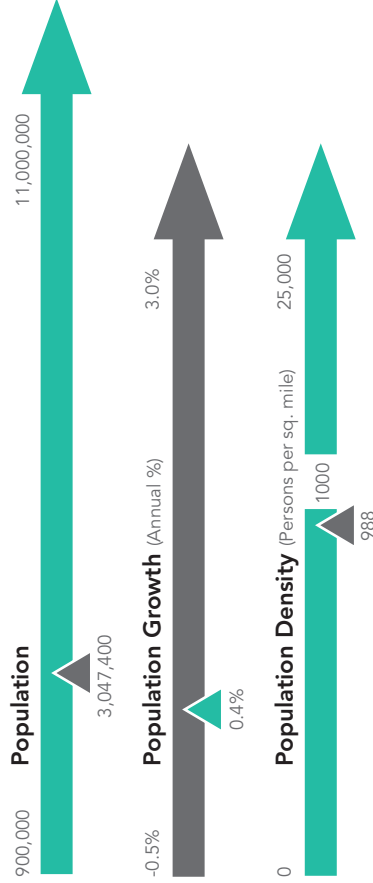
**Average Rent:**  
\$658

US Average: \$1,038



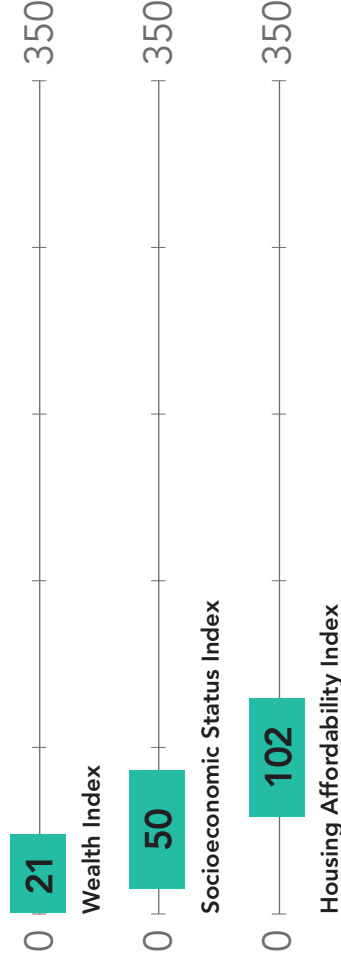
## POPULATION CHARACTERISTICS

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.





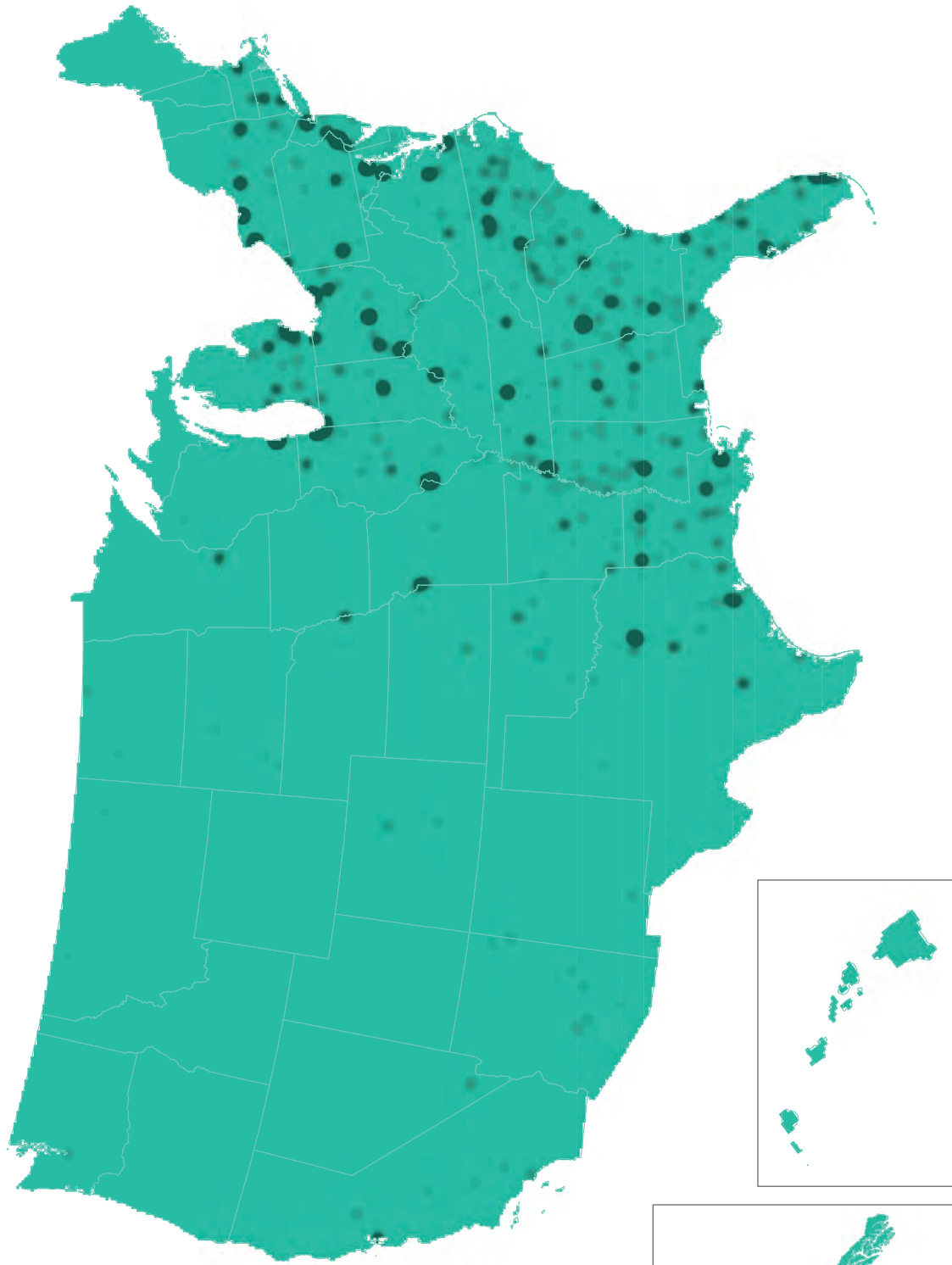
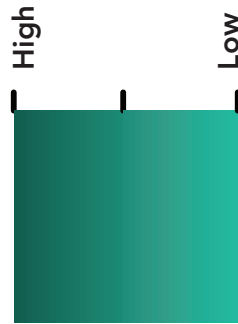


# LifeMode Group: Midtown Singles City Commons



## SEGMENT DENSITY

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



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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.
- Unemployment rate is high at 10% (Index 191); 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 is important.

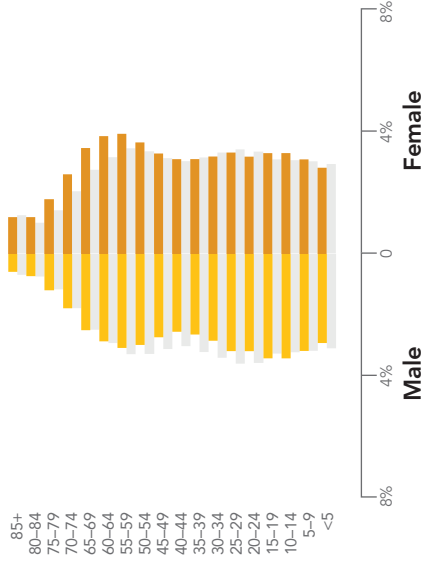


Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

### AGE BY SEX (Esri data)

Median Age: **39.6** US: 38.2

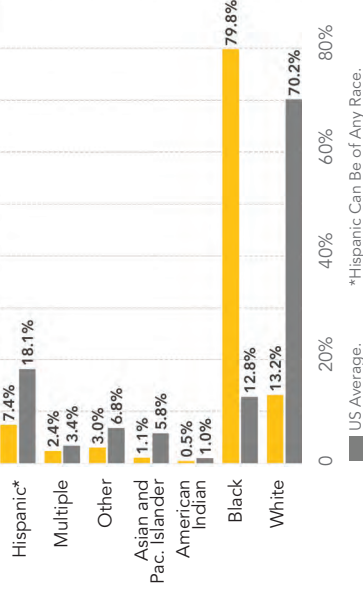
■ Indicates US



### RACE AND ETHNICITY (Esri data)

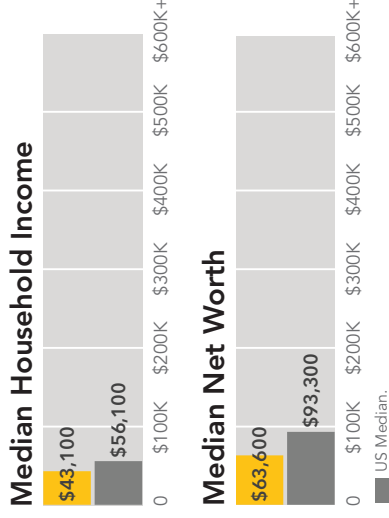
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

Diversity Index: **43.5** US: 64.0



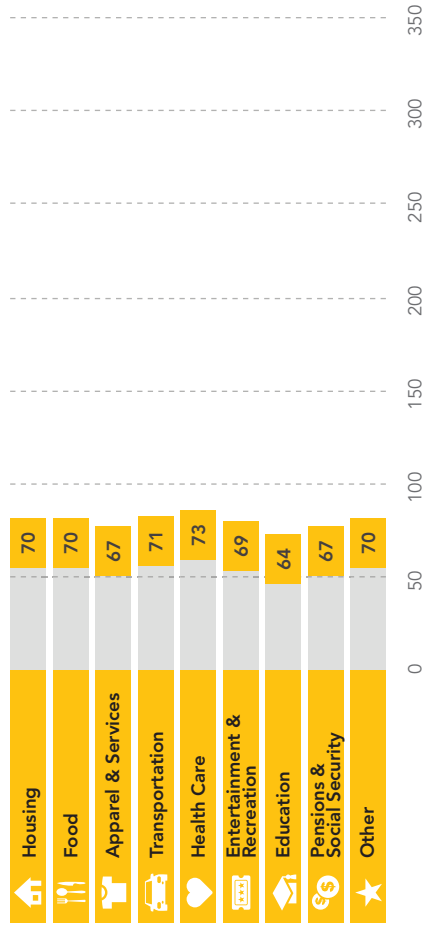
### INCOME AND NET WORTH

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.



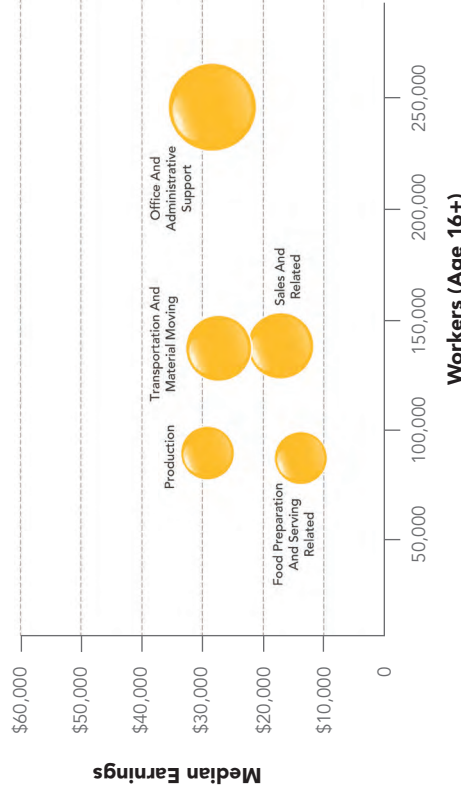
### AVERAGE HOUSEHOLD BUDGET INDEX

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



### OCCUPATION BY EARNINGS

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





## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Baby and children's products are the primary purchases made by *Family Foundations* residents.
- They 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.
- They enjoy listening to urban format radio.
- One of their favorite entertainment sources is television: subscribe to premium cable channels and own 3-4 TVs.
- They're connected, but use the Internet primarily for entertainment, chat rooms, and online gaming.

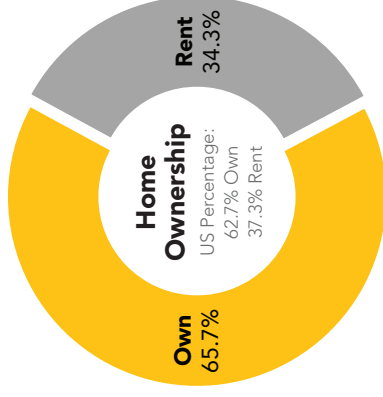
## HOUSING

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.



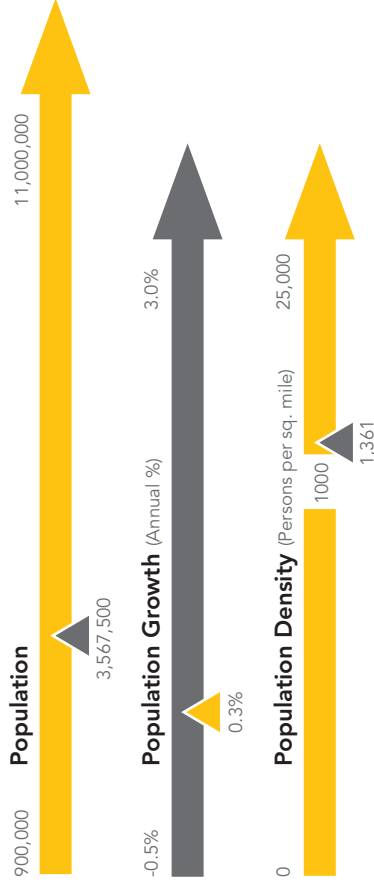
**Typical Housing:**  
Single Family

**Median Value:**  
\$116,600  
US Median: \$207,300



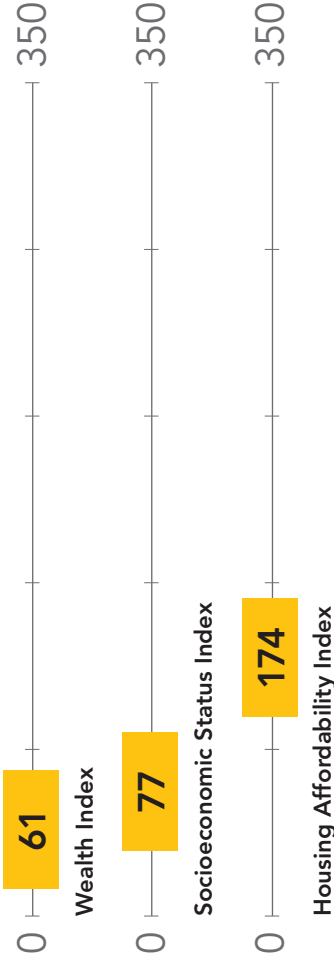
## POPULATION CHARACTERISTICS

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.



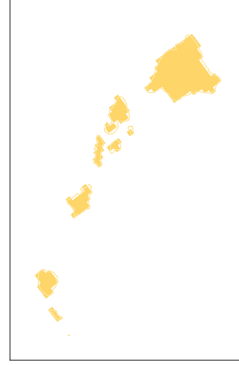
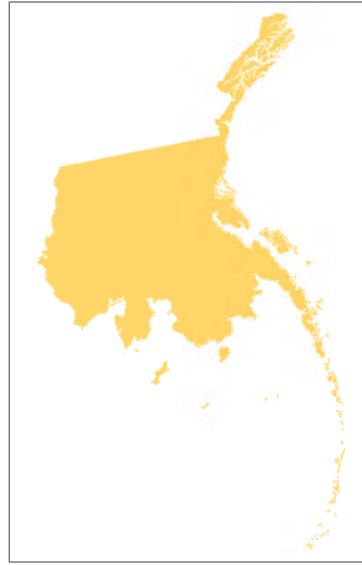
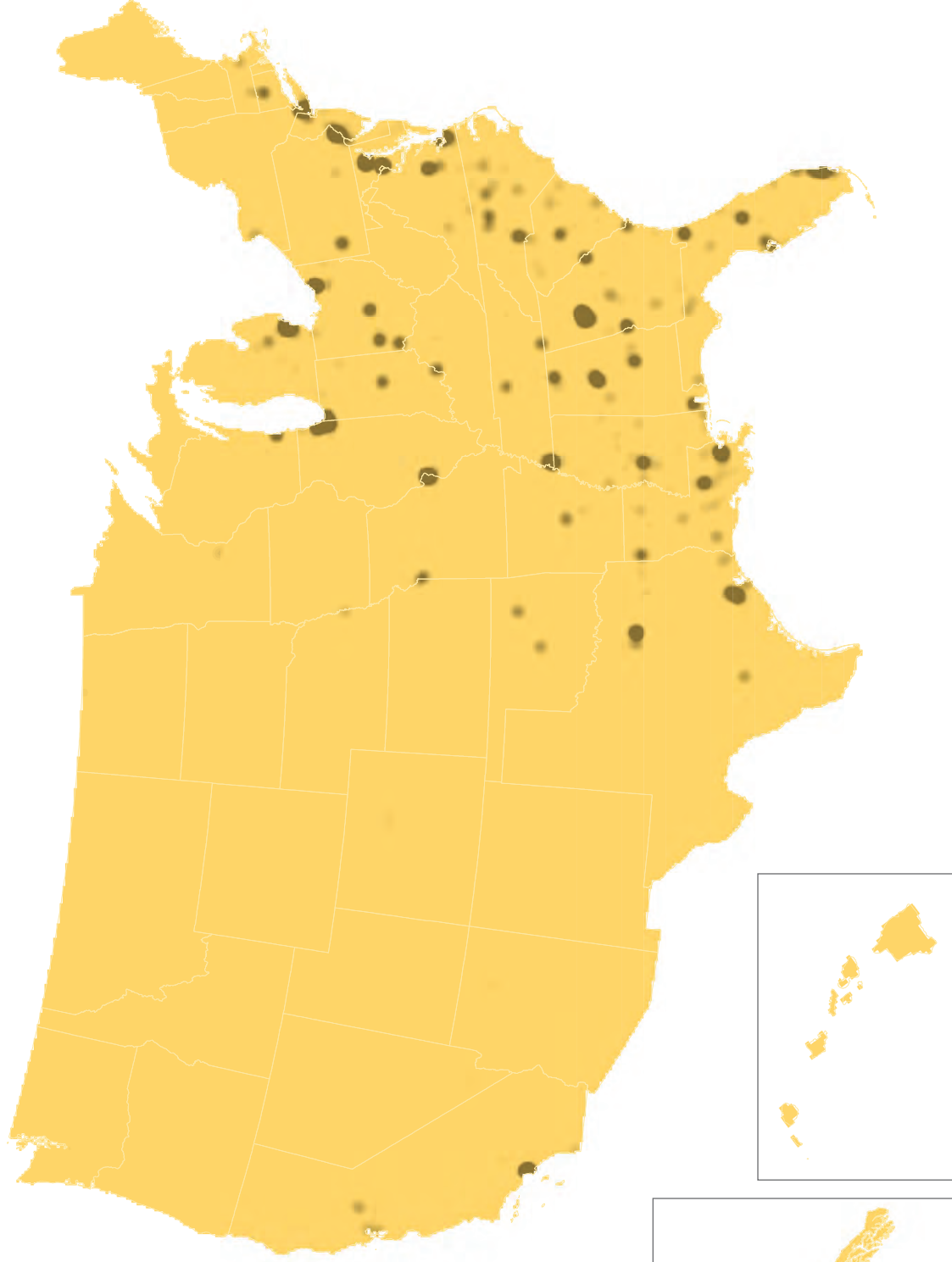
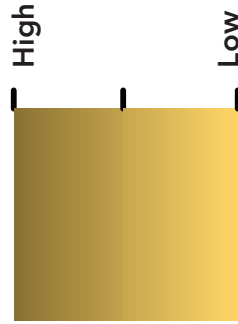
## ESRI INDEXES

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.



# Rustbelt Traditions

Households: 2,716,800

Average Household Size: 2.47

Median Age: 39.0

Median Household Income: \$51,800



## WHO ARE WE?

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

## OUR NEIGHBORHOOD

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

## SOCIOECONOMIC TRAITS

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







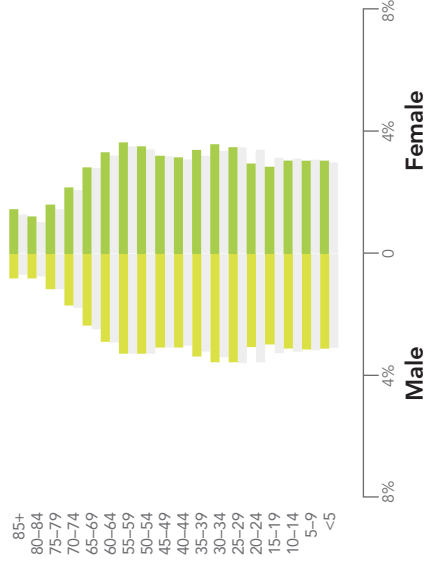
# LifeMode Group: GenXurban Rustbelt Traditions



## AGE BY SEX (Esri data)

**Median Age: 39.0** US: 38.2

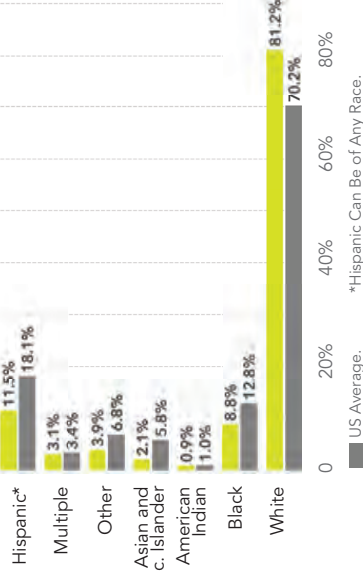
■ Indicates US



## RACE AND ETHNICITY (Esri data)

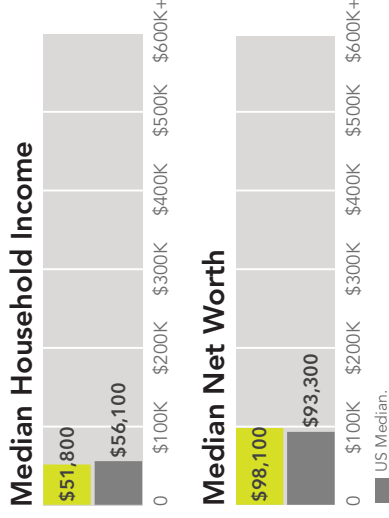
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 46.8** US: 64.0



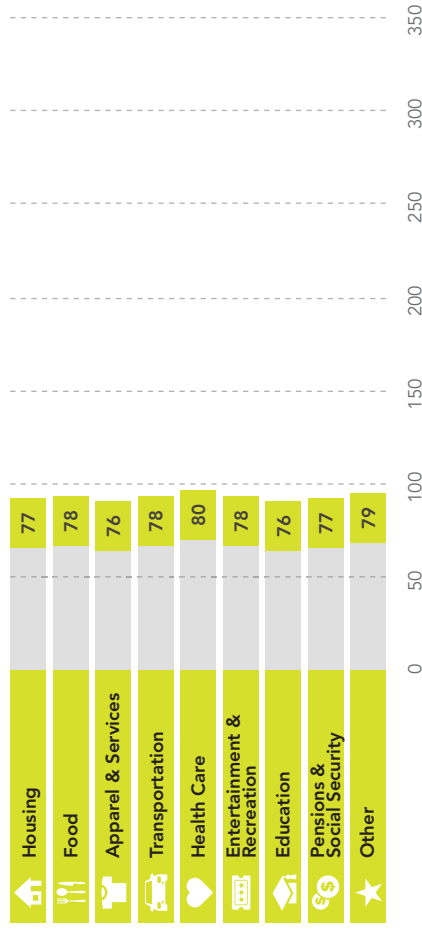
## INCOME AND NET WORTH

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.



## AVERAGE HOUSEHOLD BUDGET INDEX

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



## OCCUPATION BY EARNINGS

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



## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

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

## HOUSING

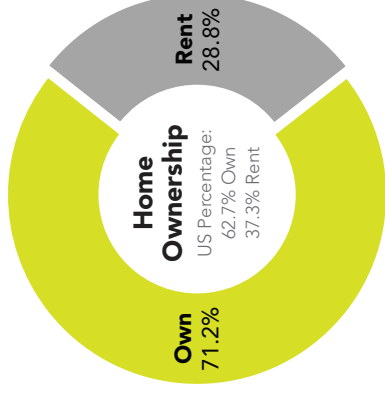
Median home value is displayed for markets that are primarily owner occupied; average rent is shown for renter-occupied markets. Tenure and home value are estimated by Esri. Housing type and average rent are from the Census Bureau's American Community Survey.



**Typical Housing:**  
Single Family

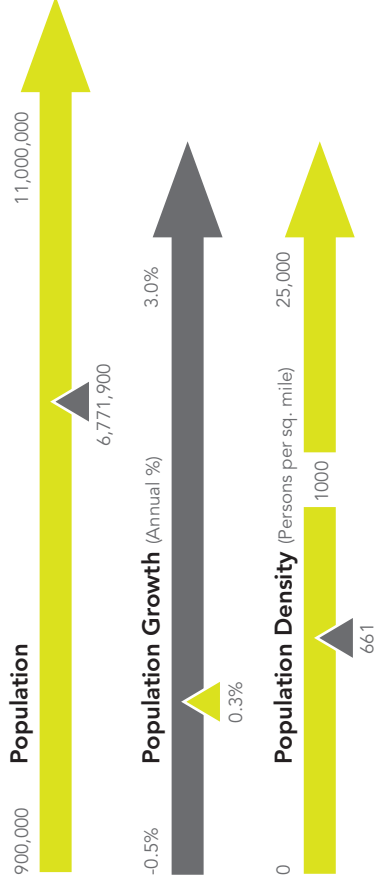
**Median Value:**  
\$123,400

US Median: \$207,300



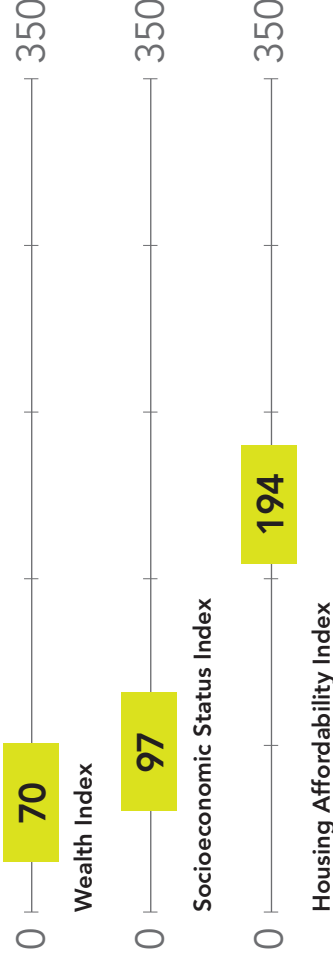
## POPULATION CHARACTERISTICS

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



## ESRI INDEXES

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





LifeMode Group: GenXurban

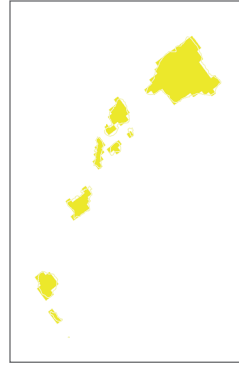
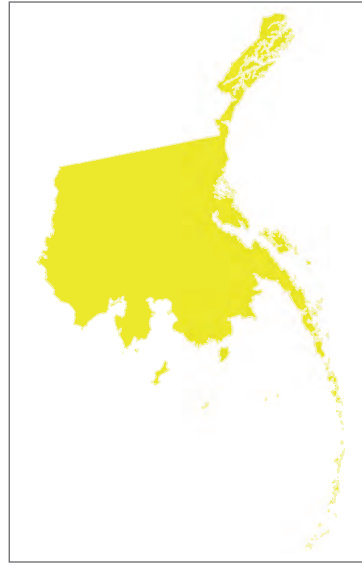
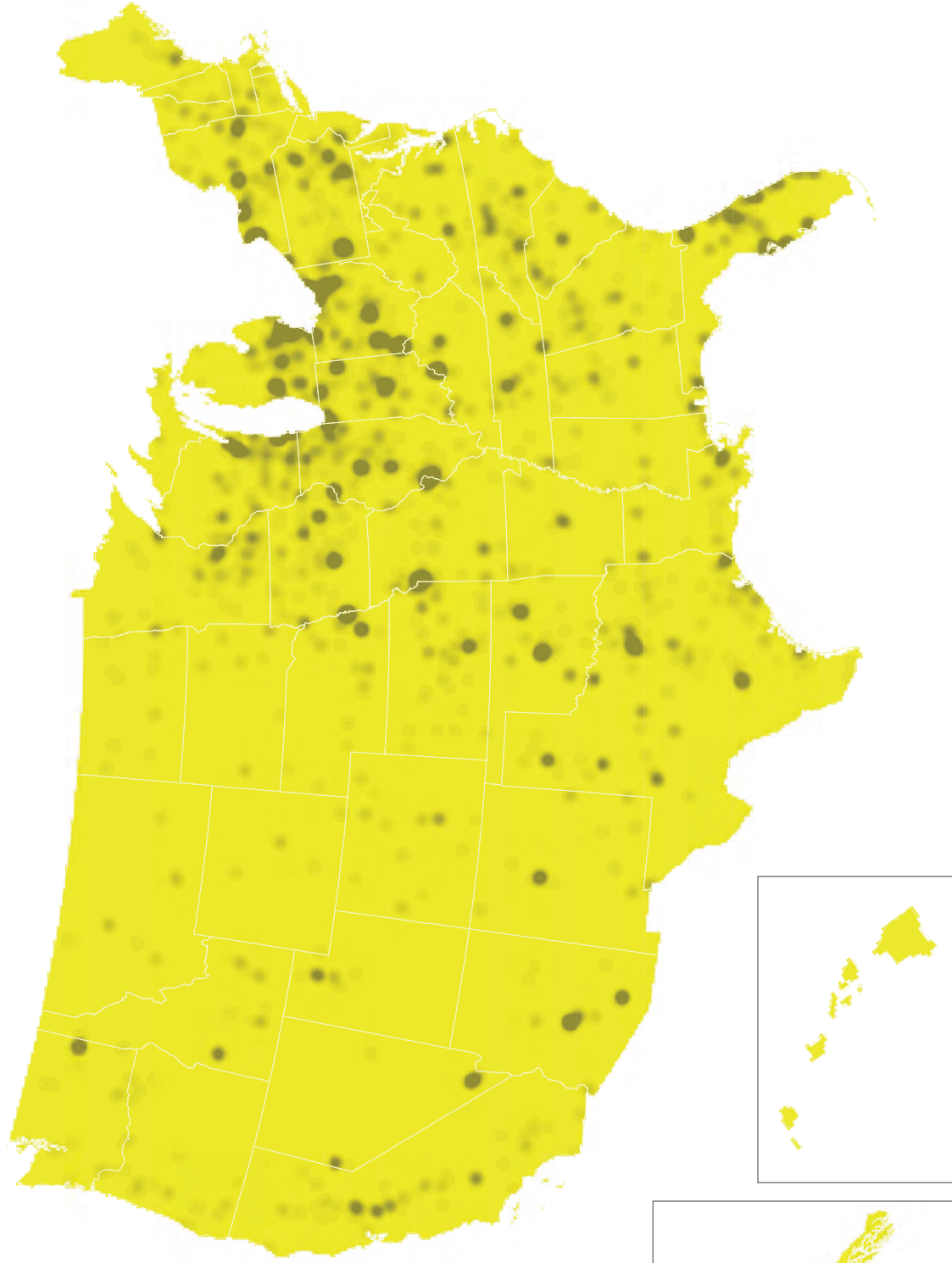
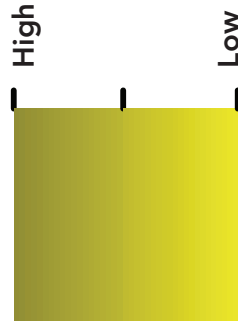
# Rustbelt Traditions



**TAPESTRY  
SEGMENTATION**  
esri.com/tapestry

## SEGMENT DENSITY

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



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# Hardscrabble Road

Households: 1,507,700

Average Household Size: 2.66

Median Age: 32.4

Median Household Income: \$28,200



## WHO ARE WE?

Hardscrabble Road neighborhoods are in urbanized areas within central cities, with older housing, located chiefly in the Midwest and South. This slightly smaller market is primarily a family market, married couples (with and without children) and single parents. Younger, highly diverse (with higher proportions of black, multiracial, and Hispanic populations), and less educated, they work mainly in service, manufacturing, and retail trade industries. Unemployment is high (almost twice the US rate), and median household income is half the US median. Almost 1 in 3 households have income below the poverty level. 60% of householders are renters, living primarily in single-family homes, with a higher proportion of dwellings in 2–4 unit buildings. This market is struggling to get by.

## 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).
- Almost four-fifths of owned homes valued under \$100,000 (more than 3.5 times the US).
- Higher percentage of vacant housing units at 18% (Index 155).
- Most households with 1 or 2 vehicles (71%), but 19% have no vehicle (Index 204).

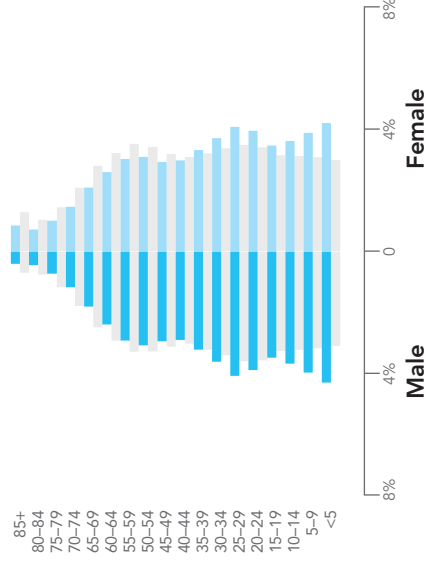
## SOCIOECONOMIC TRAITS

- Education completed: 38% with a high school diploma only (Index 137); 28% with some college or an associate's degree (Index 97).
- Unemployment rate is higher at 11.2%, almost twice the US rate.
- 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

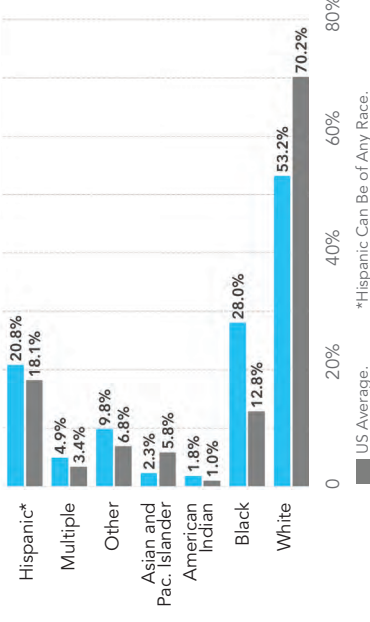
■ Indicates US



### RACE AND ETHNICITY (Esri data)

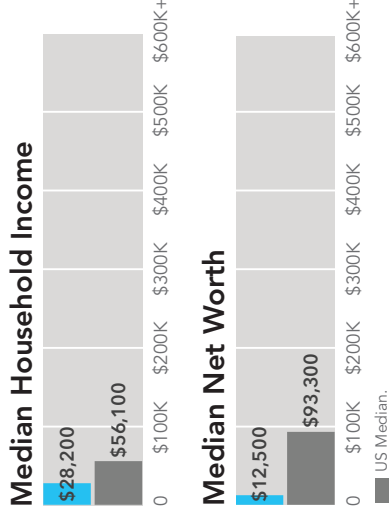
The Diversity Index summarizes racial and ethnic diversity. The index shows the likelihood that two persons, chosen at random from the same area, belong to different race or ethnic groups. The index ranges from 0 (no diversity) to 100 (complete diversity).

**Diversity Index: 75.7** US: 64.0



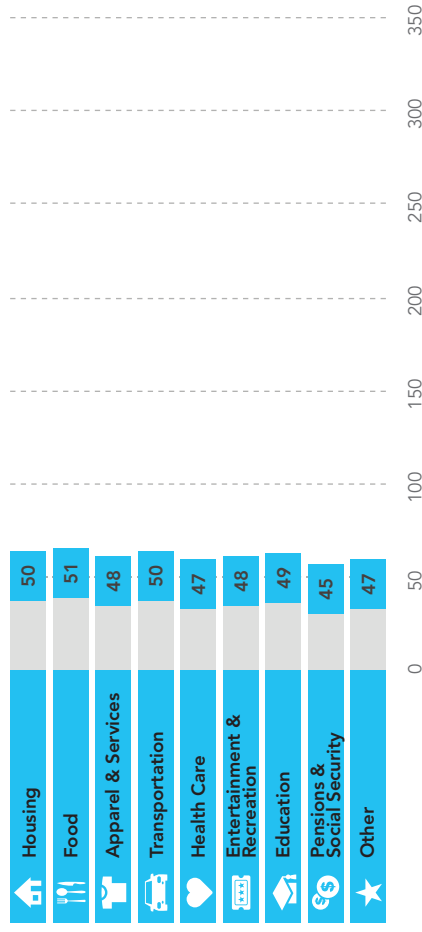
### INCOME AND NET WORTH

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.



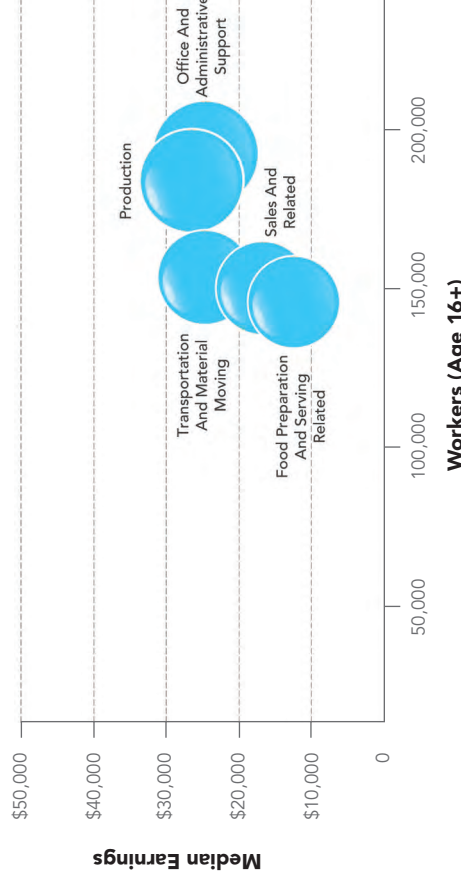
### AVERAGE HOUSEHOLD BUDGET INDEX

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



### OCCUPATION BY EARNINGS

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



## MARKET PROFILE

(Consumer preferences are estimated from data by GfK MRI)

- Little extra money to invest in retirement savings plans, stocks, or bonds.
- 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

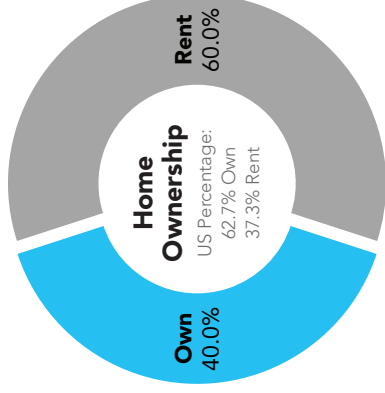
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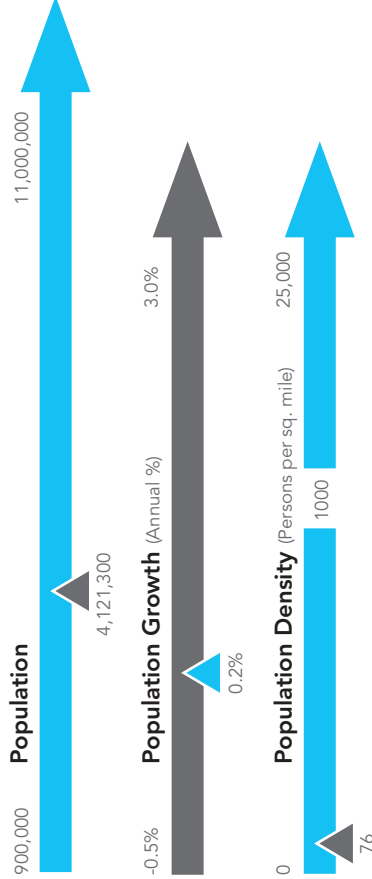
**Average Rent:**  
 \$710

US Average: \$1,038



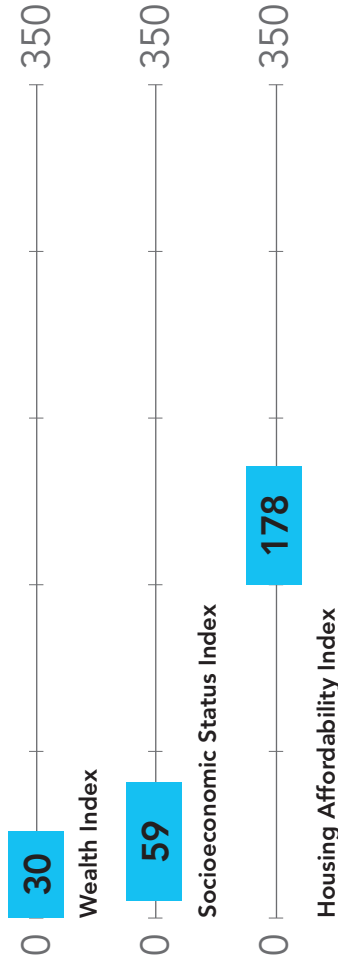
## POPULATION CHARACTERISTICS

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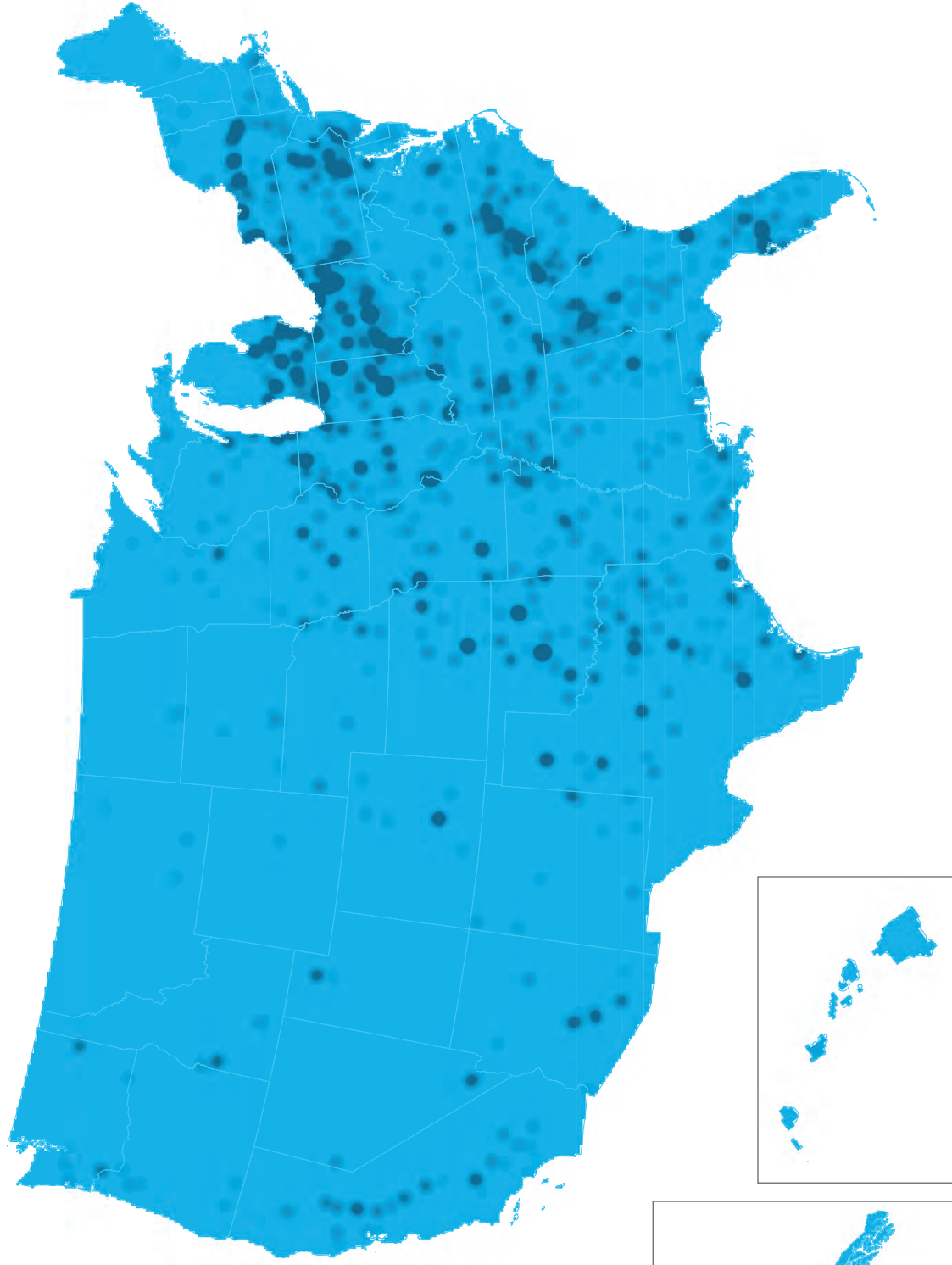
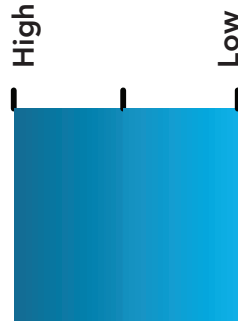


# LifeMode Group: Middle Ground Hardscrabble Road



## SEGMENT DENSITY

This map illustrates the density and distribution of the Hardscrabble Road Tapestry Segment by households.



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