



REIMAGINE WEBSTER

NOMINATION STUDY **APPENDICES**



APPENDIX A.

**ENVIRONMENTAL SITE
PROFILES**

1. VACANT RESIDENTIAL PROPERTY

SITE DESCRIPTION / CURRENT USE

The property is located on the north side of Kittelberger Park and is developed as a residential property.

SITE HISTORY

Review of Sanborn maps and assessment records indicate that this property has been developed as a residential home since the early 1900s. Review of Monroe County Plat Maps and aerial photographs indicate that this property was undeveloped land associated with the Webster Canning and Preserving Co. and/or utilized as orchards until the late 1980s-early 1990s. The property appears to be in poor condition.

ENVIRONMENTAL BACKGROUND

The property is in poor condition. Regulated building materials may exist in the building based on the age of construction.

A regulated building materials survey should be conducted if the building is to be demolished or renovated.

ADDRESS: 87-89 Kittelberger Park

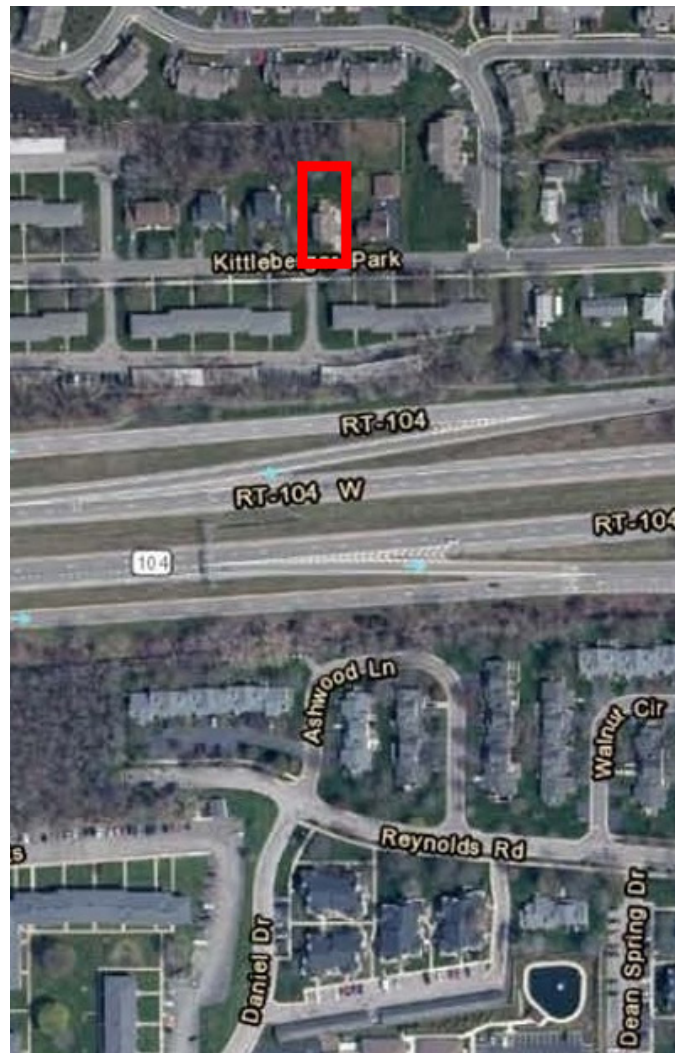
PARCEL ID: 080.05-1-58.1

SIZE: 0.34-acres

OWNER: Alfred Messerschmidt

ZONING: Residential

ACCESS: Kittelberger Park





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

GROUNDWATER CONDITIONS

Not Assessed.

NATURAL / CULTURAL FEATURES

700 feet west of Mill Creek.

USE POTENTIAL

Redevelop as open space or residential property.

2. MARK'S BREAK AND ALIGNMENT

SITE DESCRIPTION / CURRENT USE

The property is located on the northwest corner of North Avenue and Kittelberger Park and utilized as a brake shop.

SITE HISTORY

Review Sanborn Maps indicate that this property was developed with a building utilized as EP Holton Evaporated Apple Produce packaging and storage building from the 1920s to the 1940s. In the 1960s-1970s, the property was utilized as a coffee shop and former machine shop. The building was demolished prior to the early 1990s and was redeveloped in 2009 with the current building structure.

ENVIRONMENTAL BACKGROUND

The property is listed as closed NYSDEC spill Site #1101528. Petroleum impacted soil was encountered while excavating for construction of the current building. The impacted soils were removed and disposed of off-site. No above or underground storage tanks were located on the property associated with the prior use. Residual impacted soils may be present.

Subsurface investigations may be warranted to address impacted soil and/or groundwater along North Avenue in the immediate vicinity of this property.

ADDRESS: 166 North Avenue

PARCEL ID: 080.05-1-70

SIZE: 0.2-acres

OWNER: Bonmar Holdings, LLC

ZONING: Neighborhood Business

ACCESS: North Avenue





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

GROUNDWATER CONDITIONS

Not Assessed.

NATURAL / CULTURAL FEATURES

None

USE POTENTIAL

Maintain use as a commercial property.

3. MINI STORAGE

SITE DESCRIPTION / CURRENT USE

The property is located on the southwest corner of North Avenue and Commercial Street.

This property is located adjacent south of 226 North Avenue, southeast of 39 Commercial Street, west of 205 North Avenue and northwest of 195 North Avenue.

SITE HISTORY

Review of Sanborn maps indicate that this building was utilized as a storage and packing building associated with JW Hallauer and Sons Evaporated Fruits from at least the 1920s-1950s. On the 1912 Sanborn Map, a dwelling was located on the western portion of the parcel and a dwelling was located on the eastern portion. The dwelling was demolished and a new building was constructed on the eastern portion of the parcel, which is visible on the 1924-1949 Sanborn Maps. The current building was reportedly constructed in 1940 and was leased by Xerox Corporation for an undetermined time, addressed as 34 Commercial Street.

ENVIRONMENTAL BACKGROUND

Three (3) closed NYSDEC Spills are listed for this property. Spill #9005292 is associated with two (2) 3,000-gallon underground storage tanks for diesel and that were closed in place. The other spills are associated with hydraulic oil leaking into the storm sewer and no further action is needed by spills. A former railroad spur was located on the southern portion of the parcel and former buildings have been demolished. Potential regulated building materials may be present in the building based on the age of construction.

ADDRESS: 206 North Avenue

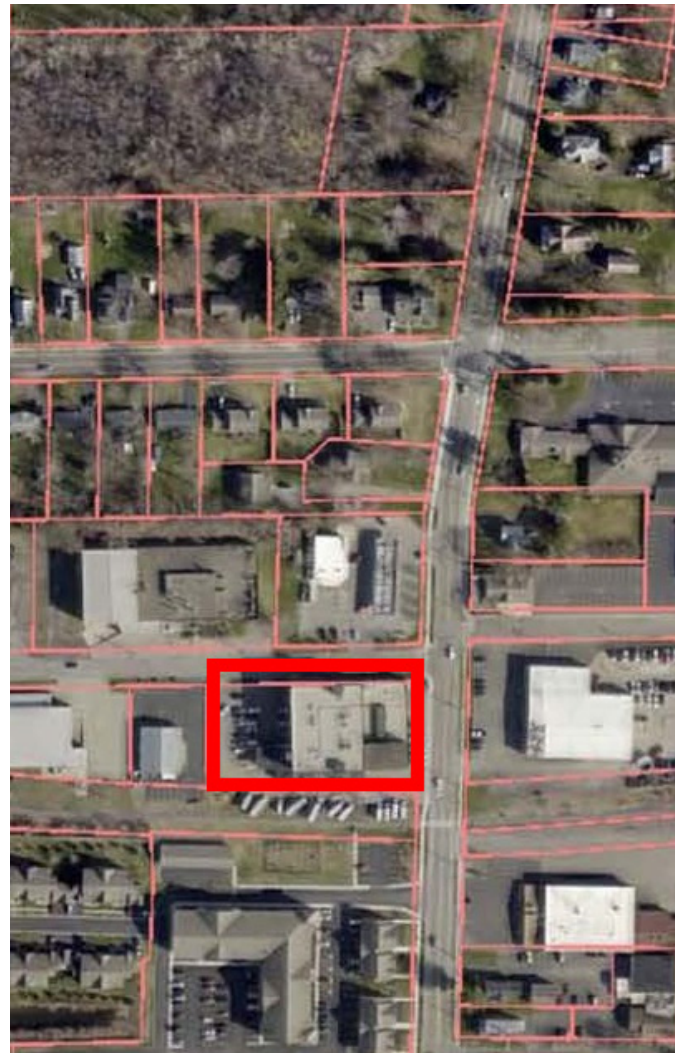
PARCEL ID: 080.05-1-51.1

SIZE: 1.15-acres

OWNER: 206 North Ave, LLC

ZONING: Neighborhood Business

ACCESS: North Avenue





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

GROUNDWATER CONDITIONS

Not Assessed.

NATURAL / CULTURAL FEATURES

Adjacent north of Hojack Trail.

USE POTENTIAL

Maintain use as a warehouse/commercial property.

4. SUNOCO GAS STATION

SITE DESCRIPTION / CURRENT USE

The property is located on the west side of North Avenue and north side of Commercial Street and currently utilized as a gasoline station.

This property is located adjacent to the north of 166 North Avenue, east of 39 Commercial Street and northwest of 205 North Avenue.

SITE HISTORY

Review of Sanborn maps indicate that this property was utilized as a store on the southwestern corner of the parcel. The property was undeveloped on the 1951 aerial photograph and developed with a structure on the eastern portion of the parcel on the 1969-1971 aerial photographs. On the 1985, the eastern portion of the structure appeared to have been demolished and a small structure is visible the central portion of the parcel. The current gasoline station was constructed in 1990.

ENVIRONMENTAL BACKGROUND

Three (3) closed NYSDEC Spills and one (1) leaking storage tank (LTANK) are listed for this property. Spill #9702788 is associated with petroleum impacted soils encountered along the southeastern property boundary on Route 250 while excavating for underground utilities. Approximately 43-tons of petroleum soil was removed and disposed of off-site. This spill report also indicated that in 1990, LTANK #9006680 was associated with five (5) underground storage tanks that were removed from the southeastern portion of the property and three (3) new USTs that were installed on the southwestern portion of the property as well as the construction of the current building. Spill #0800678 is associated with petroleum impacted soil and groundwater that was encountered and disposed of while decommissioning four (4) dispensers in the central portion of the property and excavating an electrical trench along the southeastern corner of the parcel. Spill #1401121 is associated with a minor spill of gasoline onto the pavement. In addition, on the 1949 Sanborn Map, a gasoline tank was noted along North Avenue. Potential residual impacted soil and groundwater may be present at this facility.

ADDRESS: 226 North Avenue

PARCEL ID: 080.05-1-50

SIZE: 1.09-acres

OWNER: MDE Coast 6, LLC.

ZONING: General Industrial

ACCESS: North Avenue





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

GROUNDWATER CONDITIONS

Groundwater samples collected in 2008 indicate that groundwater with elevated semi-volatile organic compounds are located on the southeastern portion of the property and groundwater flow in this area is to the southeast.

NATURAL / CULTURAL FEATURES

225 feet north of Hojack Trail.

USE POTENTIAL

Maintain use as a gasoline station. A subsurface investigation should be considered for this property to address potential impacted soil and/or groundwater that may be encountered during redevelopment and/or rehabilitation. A regulated building materials survey should be conducted if renovations or demolition are considered.

5. QUALITY INDUSTRIAL COATERS

SITE DESCRIPTION / CURRENT USE

The property is located on the north side of Commercial Street and is utilized as a manufacturing facility.

This property is located adjacent to the west of 266 North Avenue, northwest of 206 North Avenue and 140 feet from 50 Commercial Street.

SITE HISTORY

Review of Sanborn maps indicate that in the 1940s to the 1950s, this property was developed with two (2) greenhouses associated with Webster Canning and Preserving Co. The current building was constructed as a manufacturing facility in 1969

ENVIRONMENTAL BACKGROUND

This property is listed as a very small quantity generator due to chromium and halogenated solvent disposal from the 1990s to the mid-2010s. Two (2) tanks were observed on the southwestern portion of the property on the 1940 Sanborn Maps. No tank removal reports or NYSDEC spill reports are on file associated with the tank removals. Regulated building materials may be present in the building based on the age of construction.

Review NYSDEC Records and consider a subsurface investigation for this property to address potential impacted soil and/or groundwater that may be encountered during redevelopment and/or rehabilitation. A regulated building materials survey should be conducted if the buildings are to be demolished or renovated.

ADDRESS: 39 Commercial Street

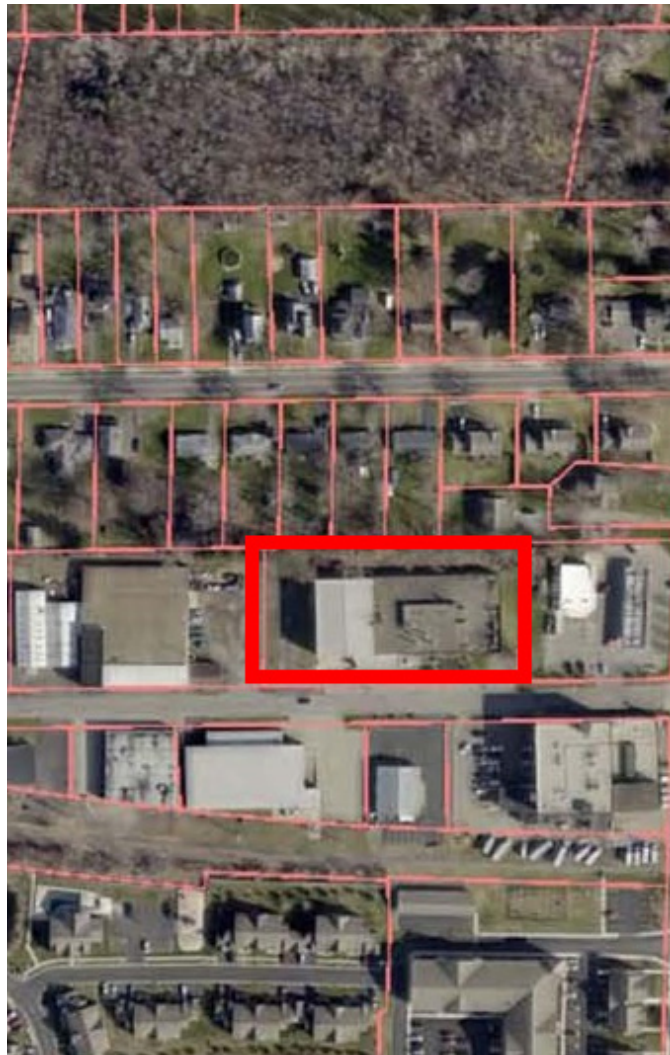
PARCEL ID: 080.05-1-49

SIZE: 1.53-acres

OWNER: 39 Commercial Street Corp.

ZONING: General Industrial

ACCESS: Commercial Street





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

GROUNDWATER CONDITIONS

Not Assessed.

NATURAL / CULTURAL FEATURES

1,300 feet west of Mill Creek; 175 feet north of Hojack Trail.

USE POTENTIAL

Maintain use as a warehouse/commercial property.



6. POOL SUPPLY, INC.

SITE DESCRIPTION / CURRENT USE

The property is located on the south side of Commercial Street and utilized as a warehouse. This property is located 90 feet southeast of 101-103 Commercial Street, 140 feet southwest of 39 Commercial Street, and 250 feet southeast of 15 Martin Street.

SITE HISTORY

Review of Sanborn maps indicate that this property was developed with a canning and storage building associated with Webster Preserving Co. from the early 1900s to the 1950s. The current building was constructed as a warehouse in 1950.

ENVIRONMENTAL BACKGROUND

One closed NYSDEC spill is listed associated with this property. Closed spill #1302037 is associated with chlorine released into the sewer. The property is in poor condition. Regulated building materials may be present in the building based on the age of construction.

A regulated building materials survey should be conducted if the buildings are to be demolished or renovated.

ADDRESS: 50 Commercial Street

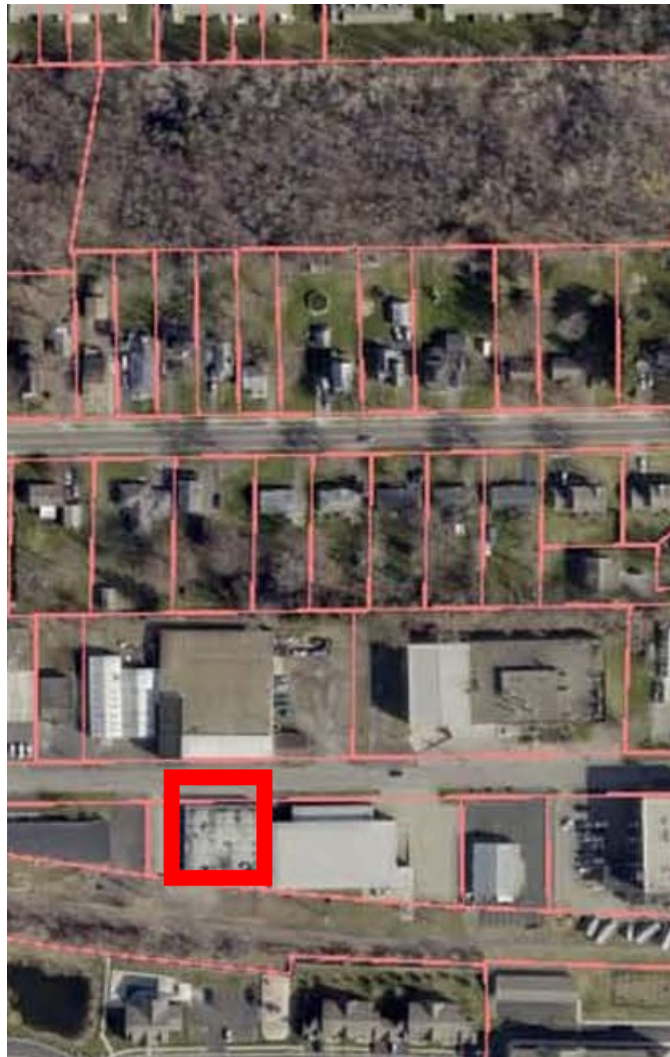
PARCEL ID: 080.05-1-55

SIZE: 0.44-acres

OWNER: David Kords

ZONING: Commercial

ACCESS: Commercial Street





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

GROUNDWATER CONDITIONS

Not Assessed.

NATURAL / CULTURAL FEATURES

Adjacent to the north of Hojack Trail; 1,100 feet west of Mill Creek

USE POTENTIAL

Maintain use as a warehouse/commercial property.

7. AUTO PLUS AUTO PARTS

SITE DESCRIPTION / CURRENT USE

The property is located on the north side of Commercial Street and utilized as an auto parts store.

This property is located adjacent to the west of 15 Martin Street, 90 feet west of 102-122 Commercial Street and 90 feet northwest of 50 Commercial Street.

SITE HISTORY

Review of Sanborn maps and assessment records indicate that 101 Commercial Street was constructed in the 1960s as a light manufacturing building. 103 Commercial Street was constructed in 1972.

ENVIRONMENTAL BACKGROUND

101 Commercial Street is listed as closed NYSDEC LTANK #0370024. Approximately 80-tons of petroleum impacted soil down to 2.5 feet below grade was removed while closing a 500-gallon underground storage tank (UST) in place. Confirmatory soil samples indicated residual levels of volatile organic compounds. Regulated building materials may be present in the building based on the age of construction.

A subsurface investigation should be considered for this property to address potential orphan tanks and impacted soil and/or groundwater that may be encountered during redevelopment and/or rehabilitation. A regulated building materials survey should be conducted if the buildings are to be demolished or renovated.

ADDRESS: 101-103 Commercial Street

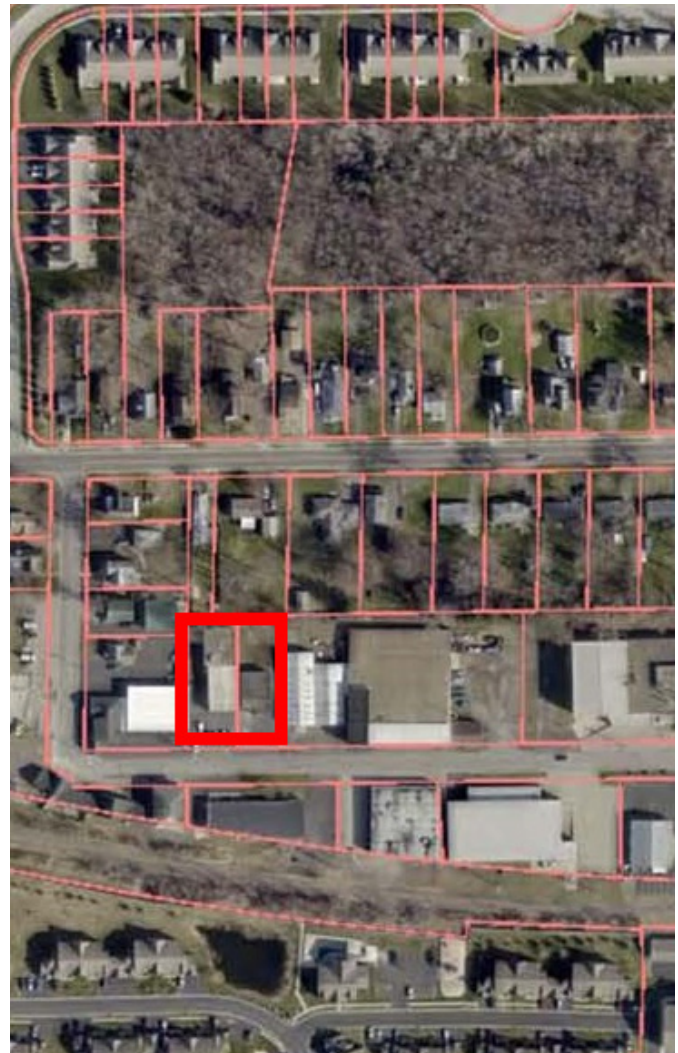
PARCEL ID: 080.05-1-47 and 080.5-1-46

SIZE: 0.31-acres and 0.28-acres

OWNER: Gary Passino

ZONING: General Industrial

ACCESS: Commercial Street





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

GROUNDWATER CONDITIONS

Not Assessed.

NATURAL / CULTURAL FEATURES

830 feet west of Mill Creek; 130 feet north of Hojack Trail.

USE POTENTIAL

Maintain use as a warehouse/commercial property.

8. NAIRY MECHANICAL

SITE DESCRIPTION / CURRENT USE

The property is located on the northeast corner of Commercial Street and Martin Street and is developed with three (3) buildings.

This property is located adjacent north and east of 102-122 Commercial Street, west of 101-103 Commercial Street and 205 feet northwest of 50 Commercial Street.

SITE HISTORY

Review Sanborn Maps indicate that this property was utilized as the paint and oil storage building for Martin Brother's Lumberyard (located adjacent to the west) from the early 1900s at least the late 1940s. The current buildings were reportedly constructed in 1972 and were utilized as Lang Heating and Cooling and Webster Auto Body in the 1980s.

ENVIRONMENTAL BACKGROUND

The property is listed as closed NYSDEC spill #9970443, addressed as 105 Commercial Street. Gasoline was released to the soil while removing a 1,000-gallon underground storage tank (UST). A gasoline tank was also noted on the eastern portion of the property on the 1949 Sanborn map. Petroleum impacted soil and groundwater has been identified due to the past use of the property. Potential regulated building material may be present in the building based on the age of construction.

Subsurface investigations including a soil vapor evaluation, may be warranted for this property to address impacted soil and/or groundwater that may be encountered. A regulated building material survey should be conducted if the buildings are to be demolished or renovated.

ADDRESS: 15 Martin Street

PARCEL ID: 080.05-1-45

SIZE: 0.48-acres

OWNER: Lang Gang, LLC

ZONING: General Industrial

ACCESS: Commercial Street and Martin Street





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

GROUNDWATER CONDITIONS

Not Assessed.

NATURAL / CULTURAL FEATURES

100 feet north of Hojack Trail and 600 feet east of Mill Creek.

USE POTENTIAL

Maintain use as a commercial property.

9. VARIOUS COMMERCIAL PROPERTIES

SITE DESCRIPTION / CURRENT USE

The property is located on the south side of Commercial Street and west side of Martin Street. A partially paved and gravel parking lot is located on the east of Martin Street, where a former building was located, and foundation slabs are visible. One (1) newly constructed building is located on the northeastern portion of the parcel. Four (4) buildings are located along the southern property boundary: 102 Commercial Street is utilized as Rochester Ceramics and the exterior appears to be in poor condition; 104 Commercial Street is utilized as Doggie Day Care; 108 Commercial Street is DeHond Cycles and Autos and Right Side Up Creations and a shed is located on the southwestern portion of the parcel. Tires were observed along the exterior of 108 Commercial Street.

This property is located adjacent to the west of 15 Martin Street, east of 150 and 156 Orchard Street and 113 feet east of 160-164 Orchard Street.

SITE HISTORY

Review of Sanborn maps indicate that 102-122 Commercial Street was constructed and utilized as Martin Brother's Lumber Yard with storage sheds along the southern property boundary from the early 1900s to at least the 1950s. Railroad spurs were observed extending onto the southeastern portion of the property from the early 1900s to at least the 1950s. In the early 1900s, the southwestern portion of the property was developed with a structure utilized as Leary Casket Shells. In 1924, the building on the southwestern portion was utilized as Jayne Oil Co. and since at least 1942, this portion of the property has been undeveloped with the exception of a shed. The main building west of Martin Street appears to have been demolished after the 1990s. The current property owner purchased the property in 2022.

ADDRESS: 102-122 Commercial Street

PARCEL ID: 080.05-1-43.1

SIZE: 1.91-acres

OWNER: FG Martin, LLC

ZONING: Commercial

ACCESS: Commercial Street and Martin Street





ENVIRONMENTAL BACKGROUND

102 Commercial Street is listed as closed NYSDEC Spill #1111918; hydraulic oil spilled associated with a Rochester Gas and Electric utility pole. Review of Sanborn Maps indicate a coal storage building and dry kiln on the southwestern portion of the property associated with Leary Casket Shell. Three (3) oil tanks, an oil warehouse and barrel storage building were noted on the 1924 Sanborn Map associated with Jayne Oil Co. In addition, one (1) gasoline tank was noted adjacent to the north of 102 Commercial Street on the 1942-1949 Sanborn Maps. There are no NYSDEC Spills or petroleum bulk storage records associated with the former use of the property. This property is located adjacent to the south of active NYSDEC spill #2201675 located at 156 Orchard Street. Potential regulated building material may be present in the building based on the age of construction.

INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

NATURAL / CULTURAL FEATURES

Adjacent to the north of Hojack Trail; 230 feet east of Mill Creek.

GROUNDWATER CONDITIONS

Not Assessed.

USE POTENTIAL

Maintain use as a commercial property. A subsurface investigation should be considered for this property to address potential impacted soil and/or groundwater that may be encountered during redevelopment and/or rehabilitation. A regulated building material survey should be conducted if the buildings are to be demolished or renovated.

10. SALON AND SPA

SITE DESCRIPTION / CURRENT USE

The property is located on the south side Orchard Street and currently utilized as a salon and spa. This property is located adjacent to the north of 102-122 Commercial Street, east of 156 Orchard Street and 115 feet west of 160-164 Orchard Street.

SITE HISTORY

Review of the 1906 Sanborn Map indicates that the southern portion of this property was associated with Leary Casket Shell, located on the southwestern portion of 102-122 Commercial Street. Assessment records indicate that the current structure was constructed in the 1940s. The 1940 Sanborn Maps indicate that this property was utilized as a saw and planing mill associated with AM Martin and Sons, located adjacent to the south. The property was utilized as Webster Tool and Die for an undetermined time, then as a pet salon and is currently a salon and spa.

ENVIRONMENTAL BACKGROUND

There are no NYSDEC listings associated with this property. The property adjacent to the east is listed as active NYSDEC spill #2201675, located at 156 Orchard Street, and was formerly utilized for petroleum storage. Impacted soil, groundwater water and/or soil vapors may have migrated onto the property. Potential regulated building material may be present in the building based on the age of construction.

A subsurface investigation including a soil vapor evaluation should be considered for this property to address potential impacted soil and/or groundwater that may be encountered during redevelopment and/or rehabilitation. A regulated building material survey should be conducted if the building is to be demolished or renovated.

ADDRESS: 150 Orchard Street

PARCEL ID: 080.05-1-43.2

SIZE: 0.74-acres

OWNER: Platinum Property Development, LLC

ZONING: Commercial

ACCESS: Orchard Street





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

GROUNDWATER CONDITIONS

Not Assessed.

NATURAL / CULTURAL FEATURES

140 feet north of Hojack Trail; 275 feet northeast of Mill Creek.

USE POTENTIAL

Maintain use as a commercial property.

11. WAREHOUSE

SITE DESCRIPTION / CURRENT USE

The property is located on the south side of Orchard Street and currently utilized as a warehouse.

This property is located adjacent to the west of 102-122 Commercial Street and 150 Orchard Street and east of 160-164 Orchard Street.

SITE HISTORY

Review Sanborn maps indicate that in the early 1900s, the southern portion of this property was part of Casket Shell MFG located at 102-122 Commercial Street and in 1924 was part of Jayne Oil Co. On the 1942-1949 Sanborn Maps, the property was utilized as GF Nagle Oil House. The current building was reportedly constructed in 1950 and has been utilized as a warehouse and most recently, Sylvan Learning and Tutoring Center.

ENVIRONMENTAL BACKGROUND

The property is listed as active NYSDEC Spill #2201675. A subsurface investigation identified petroleum impacted soils and groundwater due to the presence of former tanks on the property. Further delineation was proposed to be completed in late 2022. Closed NYSDEC LTANK #9207518 is located adjacent to the west. A soil vapor extraction system was installed at 160-164 Orchard Street and a closure letter was issued in 1993 indicating that remediation had been completed. Potential regulated building materials may be present in the building based on the age of construction.

Subsurface investigations, including a soil vapor evaluation, may be warranted for this property to address impacted soil and/or groundwater. A regulated building material survey should be conducted if the building is to be demolished or renovated.

ADDRESS: 156 Orchard Street

PARCEL ID: 080.05-1-40

SIZE: 1.0-acres

OWNER: 156 Orchard, LLC

ZONING: Commercial

ACCESS: Orchard Street





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

GROUNDWATER CONDITIONS

A subsurface investigation identified significant exceedances of volatile and semi-volatile organic compounds in the groundwater.

NATURAL / CULTURAL FEATURES

Adjacent to the north of Hojack Trail and to the east of Mill Creek.

USE POTENTIAL

Maintain use as a commercial property.

12. STM TUNED INC

SITE DESCRIPTION / CURRENT USE

The property is located on the south side of Orchard Street and currently utilized as a STM Tuned Inc. racing car parts store.

This property is located adjacent to the west 156 Orchard Street, and 115 feet west of 150 Orchard Street and 102-122 Commercial Street.

SITE HISTORY

Review of Sanborn Maps, aerial photographs and assessment records indicates that this building was constructed in 1980 as a manufacturing building. Former occupants of the property include VI Manufacturing Inc. and Webster Tool and Die for undetermined times.

ENVIRONMENTAL BACKGROUND

The property is listed as closed NYSDEC LTANK #9207518. Gasoline was released to the groundwater during the removal of a 550-gallon underground storage tank (UST). A soil vapor extraction system was installed and a closure letter was issued in 1993 indicating that remediation has been completed. The property is also located adjacent to the west of an active NYSDEC Spill at 156 Orchard Street. Petroleum impacted soil and groundwater has been identified on the adjacent property due to the past use. Potential regulated building materials may be present in the building based on the age of construction.

Subsurface investigations, including a soil vapor evaluation, may be warranted for this property to address impacted soil and/or groundwater. A regulated building materials survey should be conducted if the buildings are to be demolished or renovated.

ADDRESS: 160-164 Orchard Street

PARCEL ID: 080.05-1-41.1

SIZE: 2.4-acres

OWNER: 164 Orchard, LLC

ZONING: Commercial

ACCESS: Orchard Street





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

GROUNDWATER CONDITIONS

A subsurface investigation associated with the active spill adjacent to the west identified significant exceedances of volatile and semi-volatile organic compounds in the groundwater.

NATURAL / CULTURAL FEATURES

Adjacent to the north of Hojack Trail and to the east of Mill Creek.

USE POTENTIAL

Maintain use as a commercial property.

13. HOJACK TRAIL

SITE DESCRIPTION / CURRENT USE

The Hojack Trail is located adjacent to the south of Target Area #2, north of Target Area #3 and south of Target Area #1, utilized as a nature trail. This trail is located adjacent to 160-164 Orchard Street, 156 Orchard Street, 102-122 Commercial Street, 50 Commercial Street, 206 North Avenue, 205 North Avenue, 195 North Avenue, 137 Donovan Park and 800 Phillips Road.

SITE HISTORY

Review Sanborn Maps indicate that this property was developed with a railroad that operated until at least the early 1960s. The railroad has been converted into Hojack Trail.

ENVIRONMENTAL BACKGROUND

At the time of the site walkover, railroad spurs were observed along the path. The subsurface of this area may be impacted by the former railroad ties.

ADDRESS: North Avenue

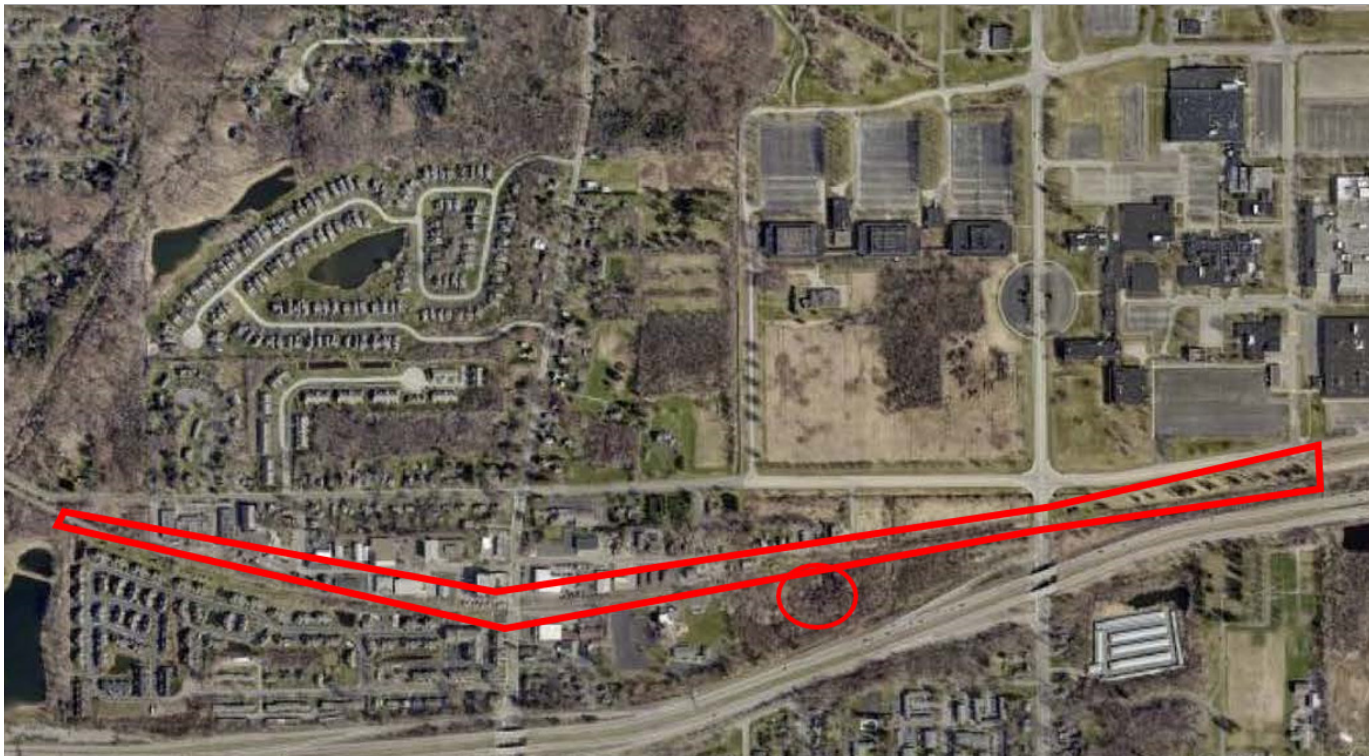
PARCEL ID: 080.06-1-36/WEB and eastern portion of 064.19-2-25.1/WEB

SIZE: 8.50-acres

OWNER: Rochester Gas and Electric

ZONING: Commercial

ACCESS: North Avenue





INFRASTRUCTURE / UTILITIES

N/A

GROUNDWATER CONDITIONS

Not assessed.

NATURAL / CULTURAL FEATURES

Hojack Trail, Mill Creek crosses beneath the western portion of the trail and a freshwater wetland adjacent to the south.

USE POTENTIAL

Maintain use as a nature trail.

14. SMITH AUTOMOTIVE

SITE DESCRIPTION / CURRENT USE

The property is located on the north side of May Street and is utilized as an auto repair facility. This property is located adjacent to the south of 195 North Avenue.

SITE HISTORY

Review of Sanborn Maps indicate that this property has been utilized as an auto repair facility since the 1940s. A former building was located on the southeastern portion of the property and an addition was constructed on the northern portion in 1987.

ENVIRONMENTAL BACKGROUND

A NYSDEC Air Permit is issued for painting operations at this facility. The property has been utilized as an auto repair facility since the 1940s. Two (2) gasoline tanks were noted on the 1942-1949 Sanborn maps on the southwestern portion of the property. There are no NYSDEC records regarding these tanks or removals. Further information obtained from the NYSDEC did not provide information relative to storage tanks. Potential orphan tanks and/or residual impacted soil and/or groundwater may be present at this facility. Potential regulated building materials may be present in the building based on the age of construction.

A subsurface investigation as well should be considered for this property to address potential debris and impacted soil and/or groundwater that may be encountered during redevelopment and/or rehabilitation. A regulated building materials survey be conducted if the building is to be demolished or renovated.

ADDRESS: 26 May Street

PARCEL ID: 080.06-1-44.1

SIZE: 0.35-acres

OWNER: James Smith

ZONING: General Industrial

ACCESS: May Street





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

GROUNDWATER CONDITIONS

Not assessed.

NATURAL / CULTURAL FEATURES

Adjacent to the south of Hojack Trail.

USE POTENTIAL

Maintain use as a commercial property.

15. PRECISION EQUIPMENT CO., THE NORTH AVENUE SALON AND SALVATORE'S PIZZERIA

SITE DESCRIPTION / CURRENT USE

The property is located on the east side of North Avenue and south of Hojack Trail and utilized as a mixed-use commercial building. This property is located adjacent to the south of 205 North Avenue and north of 26 May Street.

SITE HISTORY

Review of 1906-1912 Sanborn maps indicate that this property was occupied by Wooster and Mott Coal and Produce and was developed with five (5) buildings. The 1924-1949 Sanborn Maps indicate that the property was occupied by Wooster and Co. farm implements. The 1912-1924 Sanborn Maps also indicate that a fire department was located on the southwestern portion of the parcel. The 1951-1971 aerial photographs identify several buildings on the property. One (1) rectangular building is visible on the western portion of the 1985 aerial photograph, which was reportedly constructed in 1978, and an addition to this building is visible on the 1994 aerial photograph. A building on the eastern portion of the parcel is visible on the 2002-2009 aerial photographs and the 2010 to current aerial photographs show a building connecting the three (3) buildings to be one (1) large structure.

ENVIRONMENTAL BACKGROUND

One (1) closed NYSDEC Spill is listed for this property. Spill #2001338 is associated with complaints of washing machine parts on the grass and drums stored on the exterior portion of the building. The NYSDEC inspected the property and did not identify any environmental concerns, but did note housekeeping issues relating to drum storage of used oil within the building and along the exterior. It was requested that this area be cleaned up. There is no documentation indicating that this has been completed. At the time of the site walkover, several cars were stored on the northwestern portion of the property. A closed spill is located adjacent to the south of the property at 26 May Street. Residual groundwater impacts were noted and groundwater flow is toward the 195

ADDRESS: 195 North Avenue

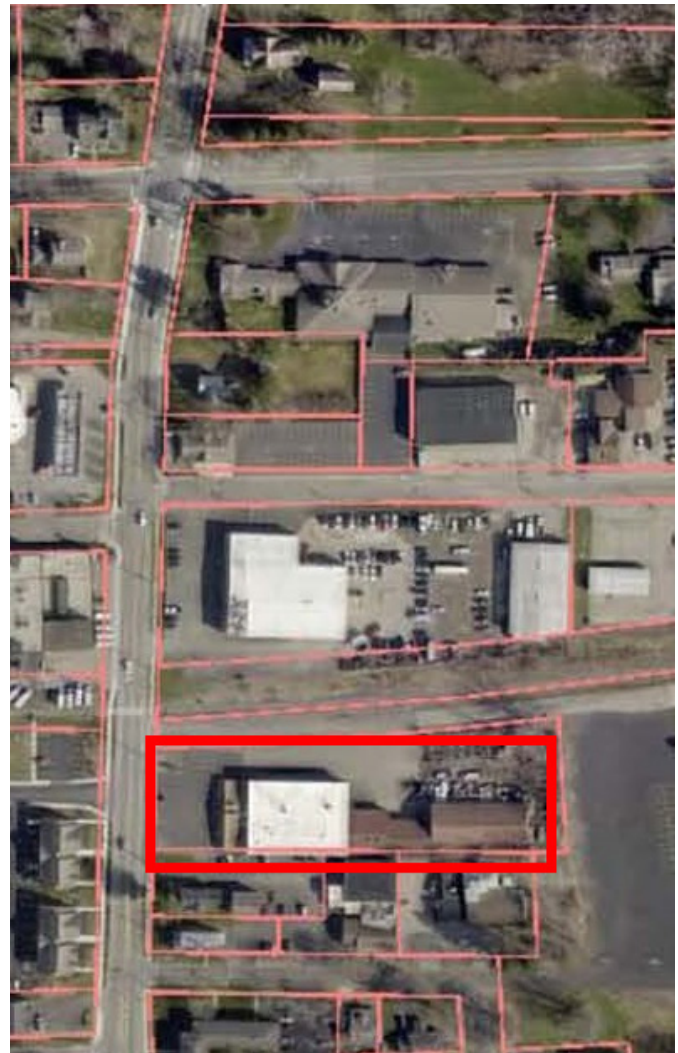
PARCEL ID: 080.06-1-47

SIZE: 1.75-acres

OWNER: Charles Conrose Jr.

ZONING: General Industrial

ACCESS: North Avenue





North Avenue. On the 1906-1912 Sanborn Maps, a tank was noted on the northeastern portion of the property as well as a railroad spur along the northern portion of the property. On the 1949 Sanborn map, a gasoline tank was noted in the central portion of the property. Potential debris from former buildings and residual impacted soil and/or groundwater may be present at this facility. Potential regulated building materials may be present in the building based on the age of construction.

INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

NATURAL / CULTURAL FEATURES

South of Hojack Trail.

GROUNDWATER CONDITIONS

Not assessed. However, residual petroleum groundwater impacts were noted associated with a closed NYSDEC spill located adjacent to the south of the property, and groundwater flow is toward 195 North Avenue.

USE POTENTIAL

Maintain use as a commercial property. A subsurface investigation should be considered for this property to address potential debris and impacted soil and/or groundwater that may be encountered during redevelopment and/or rehabilitation. A regulated building materials survey be conducted if the building is to be demolished or renovated.

16. BARBER SHOP, TAYLOR RENTAL, ALL STATE INSURANCE, PUB OFFICE, PETER GUNN AUTO SALES AND SOLAR GUARD WINDOW TINTING

SITE DESCRIPTION / CURRENT USE

The property is located on the southeast corner of North Avenue and Donovan Park and utilized as a mixed-use commercial building. This property is located adjacent to the north of 195 North Avenue, east of 206 North Avenue, southeast of 226 North Avenue, and southwest of 34-46 Donovan Park.

SITE HISTORY

Review of 1906-1912 Sanborn maps indicate that this property was occupied FJ Woodhull Grist Mill and Coal Yard with a railroad spur extending along the southern boundary. The 1924-1949 Sanborn Maps and information obtained from a prior environmental investigation indicated that the property was utilized as Russel B. Mason Co. from the late 1930s-mid-1980s as a machine shop and coal and fuel oil supply and as a pool and garden store from the mid-1960s-mid-1980s. The property was also utilized as Monroe Air Conditioning in the 1990s. The property was developed with four (4) structures and two (2) structures along the northern portion of the parcel have been demolished since the 1990s.

ENVIRONMENTAL BACKGROUND

Five (5) closed NYSDEC Spill is listed for this property. No information was provided for Spill #7780823. Spill #8280503 is associated with chlorine that was spilled during the cleaning of a 100-gallon tank. Spill #8200708 is associated with 100-gal of #2 fuel oil that was spilled, contained, and cleaned. Spill #9211920 is associated with subsurface investigations that identified petroleum impacted soil and groundwater in an area where former above ground storage tanks (ASTs) were stored east of the garage. Impacted soil has been removed as well as 55-gallon drums of cutting oil, boiler cleaner, and fuel that were no longer utilized as the facility. Spill #1001601 is associated with soil with a fuel odor that was

ADDRESS: 205 North Avenue

PARCEL ID: 080.06-1-48

SIZE: 2.13-acres

OWNER: Nor-Web, Inc.

ZONING: General Industrial

ACCESS: North Avenue





encountered while collecting soil samples for corrosive testing and no further action was taken. The property was utilized as a coal and fuel supplier from the 1930s-1980s. Potential debris from former buildings and residual impacted soil and/or groundwater may be present at this facility. Potential regulated building materials may be present in the building based on the age of construction.

INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

NATURAL / CULTURAL FEATURES

Adjacent to the north of Hojack Trail.

GROUNDWATER CONDITIONS

Groundwater samples from taken in 1999 show elevated concentrations of volatile organic compounds on the southern portion of the property. Groundwater flow is to the northeast.

USE POTENTIAL

Maintain use as a commercial property.

17. CROSSFIELD HEATING AND COOLING

SITE DESCRIPTION / CURRENT USE

The property is located on the north side of Donovan Park. The property is developed with a two-story masonry building utilized as a heating and cooling facility. The property is located adjacent to the north of 205 North Avenue and 720 feet northwest of 137 Donovan Park and 450 feet west undeveloped parcels on the north side of Donovan Park.

SITE HISTORY

Review of Sanborn Maps indicate that this property was utilized as Webco Oil Co. in the 1920s-1950s. Assessment records indicate that the current building was constructed in 1950.

ENVIRONMENTAL BACKGROUND

One (1) closed NYSDEC spill, spill #070538, is listed for the property associated with a hydraulic line leak on a truck that was cleaned up and closed. This property was utilized as Webco Oil Co. prior to the 1950s and three (3) gasoline tanks were noted on the eastern portion of the property. There are no NYSDEC records associated with these tanks. Several closed NYSDEC spills is listed at 205 North Avenue, adjacent to the southwest. Potential impacted soil and/or groundwater may be present at this facility. Potential regulated building materials may be present in the building based on the age of construction.

A subsurface investigation and a soil vapor evaluation should be considered for this property to address potential orphan tanks and/or impacted soil and/or groundwater that may be encountered during redevelopment and/or rehabilitation. A regulated building material survey should be conducted if the building is to be demolished or renovated.

ADDRESS: 34-36 Donovan Park

PARCEL ID: 080.06-1-11.1

SIZE: 0.55-acres

OWNER: Peter D'Amico

ZONING: General Industrial

ACCESS: Donovan Park





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

NATURAL / CULTURAL FEATURES

200 feet north of Hojack Trail.

GROUNDWATER CONDITIONS

Not assessed, however groundwater samples from taken in 1999 associated with the property adjacent to the south, indicated elevated concentrations of volatile organic compounds on the southern portion of the property. Groundwater flow is to the northeast and toward 34-36 Donovan Park.

USE POTENTIAL

Maintain use as a commercial property.

18. ELMER'S ANTIQUE AND JUNK YARD

SITE DESCRIPTION / CURRENT USE

137 Donovan is located on the south side of Donovan Park and developed with a one (1) story masonry building utilized for auto repair and storage. Two (2) undeveloped parcels are located on the north side of Donovan Park. The western parcel is grass covered and utilized for vehicle storage and/or parking. The eastern parcel is fenced and utilized as a junk yard. The property is located adjacent to the west of Undeveloped Land, part of 800 Phillips Road.

SITE HISTORY

Review of Sanborn Maps indicate that this property was utilized as Webster Basket Co. in the early 1900s. The western undeveloped parcel was developed with a structure on the western portion from at least the 1920s to 1970s that connected to the building to the south. The eastern parcel has not been developed in the past and utilized as a junk yard since the 1980s.

ENVIRONMENTAL BACKGROUND

137 Donovan Park is listed as a NYSDEC solid waste facility and a registered vehicle dismantling facility. Information obtained from the permit states that approximately 70 corvette bodies are stored on the property and vehicle dismantling operations have ceased. It was reported that no fluids are stored on the property. The building is in poor condition. Potential regulated building materials may be present in the building based on the age of construction.

A subsurface investigation should be considered for this property to address potential impacted soil and/or groundwater that may be encountered during redevelopment and/or rehabilitation. A regulated building materials survey should be conducted if the building is to be demolished or renovated.

ADDRESS: 137 Donovan Park and Donovan Park

PARCEL ID: 080.06-1-35, 080.06-1-22 and 080.06-1-23

SIZE: 0.15, 1.25, and 0.25-acres

OWNER: James Guck

ZONING: General Industrial

ACCESS: Donovan Park





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

GROUNDWATER CONDITIONS

Not assessed.

NATURAL / CULTURAL FEATURES

Adjacent to the north of Hojack Trail

USE POTENTIAL

Open recreational space

19. UNDEVELOPED LAND AND XEROX BUILDING 150

SITE DESCRIPTION / CURRENT USE

The property consists of a 4.91-acre portion of undeveloped land on the south side of Orchard Street between Donovan Park and Phillips Road and approximately 0.78-acres of land on the east side of Phillips Road developed with Xerox Building 150, utilized as a power building. The undeveloped land is located adjacent to the east of 137 Donovan Park and 980 feet south of Xerox Investigation Site 338. Xerox Building 150 is located 700 feet south of Xerox Investigation Site 201/206/218 and 960 feet southwest of Xerox Investigation Site 208.

SITE HISTORY

Review of Sanborn Maps and aerial photographs indicate that this property has not been developed in the past, with the exception of Donovan Park that extended east to Phillips Road, until approximately the 1980s. Remnants of the former road are visible on the southern portion of the parcel. Xerox Building 150 was constructed in the late 1960s and appears to be in poor condition.

ENVIRONMENTAL BACKGROUND

There are no NYSDEC records associated with this portion of 800 Phillips Road. Remnants of the former Donovan Park are visible on the southern portion of this parcel. Xerox Building 150 appears to be in poor condition. Potential regulated building materials may be present based on the age of construction.

Remove the former road remains. A regulated building materials survey should be conducted if Xerox Building 150 is to be demolished or renovated.

ADDRESS: 800 Phillips Road

PARCEL ID: 065.19-1-1

SIZE: 4.91 and 0.78-acres

OWNER: Xerox Corporation

ZONING: General Industrial

ACCESS: Phillips Road and Orchard Street





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

GROUNDWATER CONDITIONS

Not assessed.

NATURAL / CULTURAL FEATURES

Adjacent to the north of Hojack Trail.

USE POTENTIAL

Maintain use as undeveloped, open space. The building should be demolished if not to be utilized in the future or maintain use as a power building for Xerox.

20. XEROX INVESTIGATION SITE 338

SITE DESCRIPTION / CURRENT USE

The investigation area consists of an approximate 5.0-acre area located east of Panama Road. The property is located 980 feet west of Xerox Investigation Site 201/206/218 and 980 feet northwest of the Undeveloped Land on the south side of Orchard Street.

SITE HISTORY

Review of Sanborn Maps and aerial photographs indicate that this property was undeveloped prior to the late 1960s.

ENVIRONMENTAL BACKGROUND

There are no NYSDEC records associated with this portion of 800 Phillips Road. This property has been identified by as Xerox Investigation Site 338. Potential regulated building materials may be present based on the age of building construction.

A subsurface investigation should be considered for this property to address and delineate the impacted soil and/or groundwater that may be encountered during redevelopment and/or rehabilitation. A regulated building materials survey should be conducted if the building is to be demolished or renovated.

ADDRESS: 800 Phillips Road

PARCEL ID: 065.19-1-1

SIZE: 5.0-acres

OWNER: Xerox Corporation

ZONING: General Industrial

ACCESS: Panama Road





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

GROUNDWATER CONDITIONS

Groundwater should be assessed for metals. There is one monitoring well in the area.

NATURAL / CULTURAL FEATURES

850 feet south of the Town of Webster Recreation Center.

USE POTENTIAL

Maintain use as commercial property, open space or redevelopment..

21. XEROX INVESTIGATION SITE 201/206/218

SITE DESCRIPTION / CURRENT USE

The property consists of approximately 33.4-acres located east of Phillips Road and west of Euston Road. The property is located 980 feet east of Xerox Investigation Site 338 and 735 feet northeast of the Undeveloped Land on the south side of Orchard Street.

SITE HISTORY

Review of Sanborn Maps and aerial photographs indicate that this property was undeveloped prior to the late 1960s and has been utilized by Xerox since development.

ENVIRONMENTAL BACKGROUND

This property is listed as NYSDEC Inactive Hazardous Waste Disposal Site #828080 and identified by Xerox as Investigation Site 201/206/218. There are known impacted areas and chemical intensive areas in Buildings 201 and 218. Potential regulated building materials may be present based on the age of construction.

A subsurface investigation should be considered for this property to address and delineate the impacted soil and/or groundwater that may be encountered during redevelopment and/or rehabilitation. A regulated building materials survey should be conducted if the buildings are to be demolished or renovated.

ADDRESS: 800 Phillips Road

PARCEL ID: 065.19-1-1

SIZE: 33.4-acres

OWNER: Xerox Corporation

ZONING: General Industrial

ACCESS: Panama Road





INFRASTRUCTURE / UTILITIES

The Site is serviced by public water and sewer utilities.

GROUNDWATER CONDITIONS

Groundwater should be assessed for metals. There are approximately 25 monitoring wells in the area.

NATURAL / CULTURAL FEATURES

820 feet north of Hojack Trail.

USE POTENTIAL

Maintain use as commercial property or redevelopment.

APPENDIX B.

MARKET ANALYSIS

Webster North End Business District

BROWNFIELD OPPORTUNITY AREA (BOA)

DRAFT

May 2023

PREPARED FOR:

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1. EXECUTIVE SUMMARY

Camoin Associates was commissioned to conduct a quantitative and qualitative market analysis of the Webster North End Business District Brownfield Opportunity Area (Webster BOA). Camoin collected and summarized a host of relevant data points on demographics, economics, and market data for residential, commercial, industrial, and retail real estate. This market analysis will provide context and support for the development of plans for specific developments and projects within the Webster North End BOA. Below is a summary of the identified opportunities followed by more specific findings.

Summary Overview of Market Opportunities

| Use | Market Potential | Description |
|---------------------------------|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Residential | Very High | <ul style="list-style-type: none"> Opportunity for a variety of housing types including apartments, single-family homes, townhouses/condos, senior housing, and affordable housing options. Market potential for up to 1,035 units (733 market rate). |
| Retail and Entertainment | Moderate | <ul style="list-style-type: none"> Strong consumer spending potential but limited gaps and locational competitive disadvantage. Some potential for restaurants, gas stations, and retail/entertainment options if integrated with a mixed-use development. |
| Commercial Office | Limited | <ul style="list-style-type: none"> Limited office development potential overall. Potential medical office opportunity as a specific niche sector. Some limited professional office space as an "ancillary" use may have potential from demand from those in local spaces of lower quality. Co-working space is another niche office opportunity related to growth in remote working but would likely require co-location with attractive amenities. |
| Hospitality | Limited | <ul style="list-style-type: none"> Current hotel market conditions are not favorable for new hotel/lodging development in the BOA without a new demand driver. |
| Industrial | Moderate to High | <ul style="list-style-type: none"> Strong market demand in the Rochester region poses opportunities for Webster and the BOA to tap into. Space for tech and advanced manufacturing sectors are a promising market opportunity as well as general flex space suitable for a variety of users. |



Key Market Opportunities

Residential

Overall, market conditions are very favorable for residential development in the Webster BOA with an extremely low inventory of homes to purchase and little availability of rental units. Webster is a desirable community and while the higher interest rate environment is impacting the market, there is still substantial market potential for a variety of housing types. **The market analysis found that over the next five years, the BOA has market potential for up to 1,035 units, including 302 affordable units and 733 market rate units.**

Summary: Webster BOA 5-Year Housing Market Potential

| Housing Type | Rental Units | Homeowner Units | Total Units |
|--------------|--------------|-----------------|--------------|
| Affordable | 215 | 87 | 302 |
| Market Rate | 251 | 482 | 733 |
| Total | 466 | 569 | 1,035 |

- Market Rate Apartments:** The Rochester Market is seeing very strong demand for quality modern apartments, including demand from many young people who are not able to compete for properties in the for-sale market. Market rents are relatively strong in the Webster market at around \$1.50 per SF/month (translating to approximately \$1,125/month for a 1-bedroom unit or \$1,350/month for a 2-bedroom). However, higher quality apartments in Webster are commanding rents well above these levels, suggesting that new apartments could achieve rents in the neighborhood of \$2.00 per SF/month (\$1,500 for a 1-bedroom or \$1,800 for a 2-bedroom).
- Single-Family Homes:** Market competition for single-family and owner-occupied homes is very strong despite the high interest rate environment. Inventory is exceptionally low at less than 1 month (compared to 5 months in a healthy market) and the market is seeing significant pent-up demand with houses spending only 10 days on the market. The result has pushed housing prices substantially higher in recent years, but the demand outlook remains strong. While the median home sale price is currently around \$317,000, the market price for new homes constructed in the BOA would likely command higher prices at \$230 to \$240/SF (approximately \$460,000 to \$480,000 for a 2,000 SF home).
- Townhouses and Condos:** Alternative ownership options such as duplex units, townhouses, and condominiums would also compete well in the market as more affordable ownership options are well suited for young professionals and families as well as downsizing seniors. Townhouses or duplex units with 2-3 bedrooms are expected to be in high demand, with empty nesters and downsizing seniors representing an important market segment.
- Senior Housing Options:** With the overall aging population in the market area, demand for senior housing options is expected to grow. There is evidence that existing facilities lack capacity and that current needs are not being fully met in the Rochester area. The BOA is well positioned for senior housing, particularly if developed in conjunction with additional services and amenities within walking distance.
- Affordable and Workforce Housing:** There is also a need in the community for additional affordable and workforce housing at price points below current market level rents and home sale prices. While this type of



housing can take many forms, rental options were found to be in greater need. This type of housing could potentially be integrated with market-rate housing to create a mixed-income community.

Retail

Overall, Webster has a relatively affluent consumer base with strong spending potential; however, much of the local population's retail needs are currently being met. The concentration of retail along Route 104, including available spaces, just to the west of the BOA area provides a difficult competitive environment. However, there may be new retail opportunities within the BOA tailored to the more immediate current and potential future population base. Potential retail opportunities include:

- **Retail and Entertainment in Mixed-use Development:** The greatest retail and entertainment potential in the BOA is associated with the number and type of potential future residents in the BOA. For example, several hundred new market rate housing units would create potential market opportunities for new convenience retail, restaurant/coffee shop(s), and other similar offerings catering to the immediate population base.
- **Restaurants:** the broader regional market area is underserved by full-service restaurants with the potential to accommodate 2-3 additional establishments. Additionally, there may be restaurant opportunities to fill gaps in the current mix of restaurant types within the Village of Webster.
- **Gasoline Stations:** The local and regional retail trade areas are able to support at least 2 additional gas stations. Generally a location within the BOA with easy proximity to Route 104 would be a preferred location for any gas station business.
- **Gasoline Station:** The local and regional retail trade areas are able to support at least 2 additional gas stations. Generally a location within the BOA with easy proximity to Route 104 would be a preferred location for any gas station business.

Office

Generally, the local and regional office market is weak with market impacts being felt from the pandemic and greater rates of remote working. Additionally, demand projections suggest little future office growth demand. Traditional office space is not expected to be a meaningful market opportunity for the BOA; however, limited and specific office uses were identified with potential.

- **Limited Professional Services Office Space:** New office use could be feasible in a mixed-use approach with demand coming from existing small professional office users in the Webster area looking to upgrade to higher quality space.
- **Medical Office:** There is expected to be market potential from growth in the health care industry for office spaces for outpatient facilities and other ambulatory care offices. While the BOA may not be a preferred location for medical office, additional uses such as market rate and/or senior housing would enhance viability.
- **Co-Working/Remote Working Space:** Webster is an attractive place to live making it an ideal location for remote workers. A flexible office product such as co-working space would likely perform well in the market, particularly when co-located with amenities and housing for a professional workforce.



Hospitality

Overall, the BOA is not expected to have any significant market potential for a hotel or lodging use in the foreseeable future. While the BOA has relatively easy access to Route 104, visibility from the highway is limited and more attractive locations are available for lodging uses. Additionally, hotel market metrics do not suggest that conditions are favorable for a new establishment in the Webster area. However, it should be noted that market potential could be enhanced if new visitor-generating uses were included as part of the revitalization of the BOA.

Industrial and Flex

Overall, the Rochester region's industrial market is relatively strong and is experiencing record low vacancy rates to start 2023. Deliveries of new industrial space has been sluggish, resulting in a growing disparity between supply and demand. Furthermore, the large-scale buildings with industrial conversion potential have largely been utilized and much of the remaining inventory has reached a point of obsolescence. With a high quality of life, attractive infrastructure, and ease of access to Route 104, the BOA is in a strong market position for future industrial growth. Although, the BOA may be best suited to capitalize on more small- and mid-size tech-related manufacturing and R&D opportunities.

- **Several key manufacturing industries are driving industrial demand in the Rochester region.** Industry sectors expected to generate future demand for industrial real estate in the region include:
 - **Food and Beverage Production:** This sector includes growth in the region's existing dairy industry concentration as well as users such as aquaculture, hydroponics, and other innovative indoor growing operations, in addition to traditional food processing and packaging.
 - **Semi-conductor Supply Chain:** This is a growing sector in the region and businesses in this sector are anticipated to generate demand for space.
 - **Optics, Photonics & Imaging:** Rochester is a major hub for businesses in this sector and future growth is anticipated within this niche industry.

- **Flex Market is strong and may offer opportunity.** Flex space, characterized typically as office and industrial space together with "flexibility" for a broad variety of manufacturing and other industrial activities, is currently in high demand. This "light" industrial space is typically aligned with demand from small businesses. While there are signs the flex market may be slowing, there is still anticipated potential for flex development in Webster.

- **Warehousing and Distribution space remains in high demand but may be a challenging fit for the BOA.** Users are actively looking for additional warehousing, distribution, and fulfillment center space in the region. The BOA's proximity to Route 104 suggests potential opportunity, however, the site requirements for these users are not likely to align with the availability of space in the BOA.



2. INTRODUCTION

Camoin Associates is working as a sub-consultant to Bergmann Associates and has performed multiple analyses of the Webster BOA area which together offer a real estate market evaluation. The component parts of the report provide important understanding on their own. However, together they create a compelling sense of what types of development activities would be feasible.

Report sections:

- Demographic & Socioeconomic Analysis
- Economic Base Analysis
- Residential Market Analysis
- Retail Market Analysis
- Office Market Analysis
- Hospitality Market Analysis
- Industrial & Flex Market Analysis

Methodology

The purpose of this effort is to identify market-feasible redevelopment opportunities for properties within the Webster BOA that will serve as catalysts for revitalization both in the immediate area and throughout the wider areas of Webster Village and the Town of Webster. The market analysis examined a wide variety of use types through data analysis and interviews with local experts. The analysis identified opportunities that have strong market potential given existing supply and demand characteristics. Demographic information, economic trends, and property characteristics informed this analysis. Constraints related to zoning and land use regulations, building conditions, community and political vision, financial feasibility, and other aspects of feasibility were not examined in this report.

Attachment A lists the complete set of data sources used in this evaluation. To summarize, Camoin uses best-in-class options for demographic, industry, and real estate trends. These comprise a combination of publicly available data and surveys (Census, Bureau of Labor Statistics) as well as proprietary data applications (Lightcast, CoStar). These options allow analysis based on data that is current and up to date, that has a time series of historical data to investigate changes over time, and lastly estimates of future metrics that project current trends in order to predict feasibility for proposed projects and market conditions.

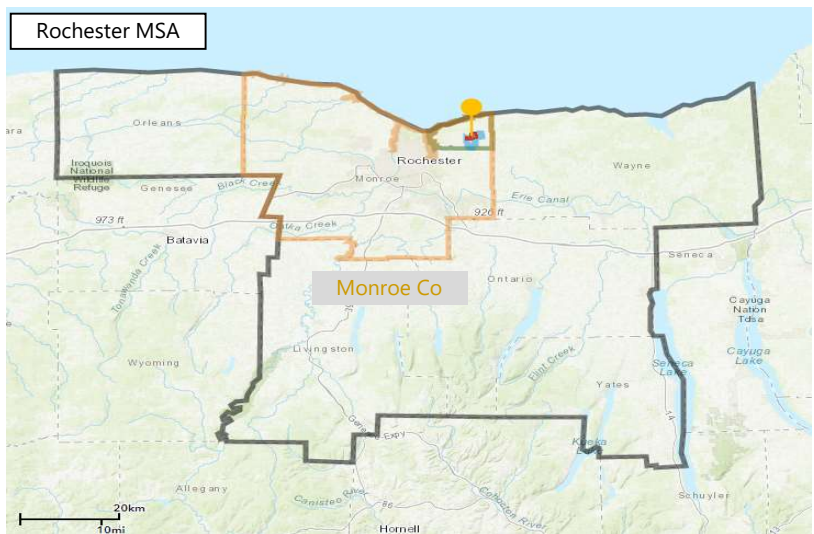
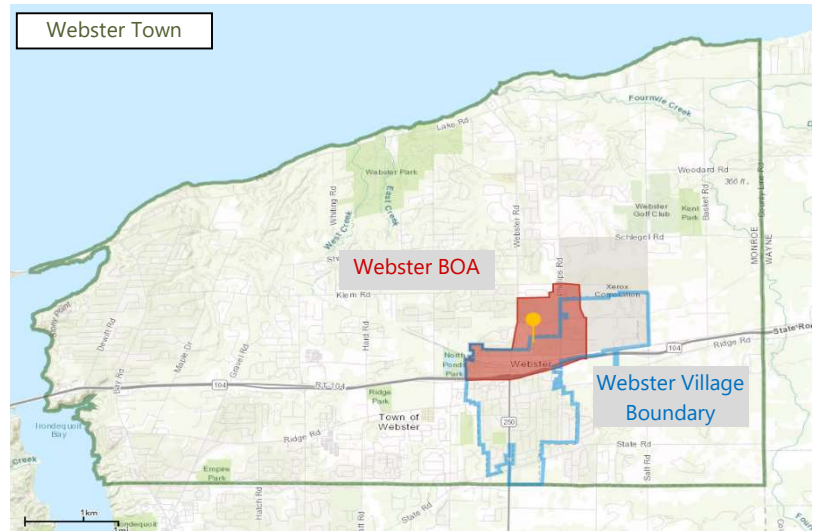
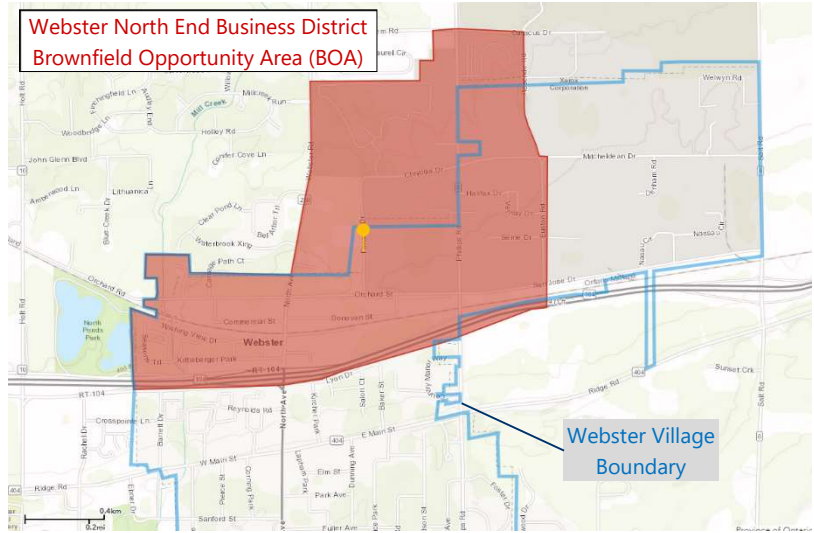


Geographies

The project area is the designated Webster North End Business District Brownfield Opportunity Area, which sits on the north edge of New York State Route 104 and straddles the border of Webster Village. The 387-acre district includes a mix of property types, including residential, industrial, and commercial buildings. This area is shaded in **red** and has a **yellow** pin for orientation. In the first map it is front and center with the Charles E. Sexton Memorial Park just to its west.

This analysis includes several comparative geographies that are used throughout the report. Comparing the BOA to regions that are geographically close offers context for trends occurring at the local level. It also allows the demographic, economic, and real estate market trends to be seen in a broader sense and in larger markets.

The Village of Webster is designated with a **blue** boundary and can be seen in all three maps. The Town of Webster is designated with a **green** boundary and is seen in the second and third maps. Monroe County is designated with a **yellow** boundary and is seen in the last map. The Rochester MSA is designated with a **dark gray** boundary. The entire State of New York is also used as a comparative geography.



3. DEMOGRAPHIC TRENDS

Key Findings

- The BOA and Village have seen significant recent population growth.** From 2010 to 2022 the Webster North End Business District BOA's population grew by 54.5%, which significantly outpaced the village (15.0%), town (6.0%), county (1.4%), and state (4.0%). Population growth for the BOA is projected to continue for 2022–2027, but at a much slower rate of less than 1.0%.
- Household growth has outpaced population growth, with a shift to smaller households.** The significant population growth in the Webster BOA led to significant growth in the total number of households between 2010 and 2022. In that period, Webster BOA households increased by 90%. In comparison, Webster Village grew by 24% and the Town of Webster grew by 13%. The average household size declined from 2.51 in 2010 to 2.04 in 2022. The shrinking household size is a trend that is present in the village, town, county, and state.
- Webster BOA and the Village of Webster have a higher concentration of young adults.** Approximately 29% of residents of the BOA are in the 20–39-year-old age cohort. However, the Webster BOA, is lagging in the 0–19 age cohort, with only 21% compared to 25% for the village and 23% for the town. Overall, the Webster BOA median age of 39.9 is the youngest of the study areas except for New York (39.6).
- The BOA and Village have less racial diversity than the surrounding region but are expected to trend towards greater diversity in the future.** Between 2022 and 2027 the proportion of the population identifying as solely white is expected to decline by 1.1 percentage points in the Webster BOA, compared to 2.5 for New York State and 3.0 for Monroe County.
- The BOA and Village have a relatively high concentration of middle-income households.** The Webster BOA has the largest share of households with incomes between \$50,000 and \$74,999 compared with any other region. Every other study area has a higher percentage of households with incomes greater than or equal to \$75,000. Webster BOA has the largest portion of households with income less than \$50,000, but the smallest share of households in the lowest income bracket (less than \$15,000). When comparing median household incomes, Webster BOA is ranked lowest with a median of \$62,342 in 2022. In comparison, the Town of Webster has the highest median household income level at \$90,121, followed by New York (\$79,320) and Webster Village (\$69,549).
- The Webster BOA population is relatively well educated.** The BOA population has greater college educational attainment, with 73.3% of the population having either an associate's or bachelor's degree or higher in 2022. Webster BOA also has a low rate of residents without a high school diploma or equivalent, with only 4.4% of residents lacking this attainment.



Demographic Summary

| | 2010 | 2022 | 2027 | 2010-2022 Growth Rate | 2022-2027 Growth Rate |
|-----------------------------------------------------------------|------------|------------|------------|--------------------------|--------------------------|
| Webster North End Business District Brownfield Opportunity Area | | | | | |
| Total Population | 767 | 1,185 | 1,195 | 3.7% | 0.2% |
| Median Age | 41.1 | 39.9 | 40.5 | -0.2% | 0.3% |
| Total Households | 305 | 581 | 593 | 5.5% | 0.4% |
| Average Household Size | 2.51 | 2.04 | 2.01 | -1.7% | -100.0% |
| Median Household Income | | \$62,342 | \$74,846 | | -100.0% |
| Webster Village, NY | | | | | |
| Total Population | 4,984 | 5,731 | 5,780 | 1.2% | 0.2% |
| Median Age | 38.7 | 40.2 | 40.3 | 0.3% | 0.0% |
| Total Households | 2,187 | 2,721 | 2,777 | 1.8% | 0.4% |
| Average Household Size | 2.24 | 2.07 | 2.05 | -0.7% | -0.2% |
| Median Household Income | | \$69,549 | \$89,610 | | 5.2% |
| Webster Town, NY | | | | | |
| Total Population | 42,641 | 45,199 | 445,180 | 0.5% | 0.0% |
| Median Age | 42.9 | 45.3 | 45.6 | 0.5% | 0.1% |
| Total Households | 17,152 | 19,347 | 19,544 | 1.0% | 0.2% |
| Average Household Size | 2.47 | 2.32 | 2.29 | -0.5% | -0.3% |
| Median Household Income | | \$90,121 | \$103,560 | | 2.8% |
| Monroe County, NY | | | | | |
| Total Population | 744,344 | 754,888 | 747,598 | 0.1% | -0.2% |
| Median Age | 38.3 | 40.2 | 40.9 | 0.4% | 0.3% |
| Total Households | 300,422 | 316,982 | 316,889 | 0.4% | 0.0% |
| Average Household Size | 2.39 | 2.29 | 2.27 | -0.4% | -0.2% |
| Median Household Income | | \$ 67,244 | \$ 80,226 | | 3.6% |
| New York | | | | | |
| Total Population | 19,378,102 | 20,154,573 | 19,778,809 | 0.3% | -0.4% |
| Median Age | 37.9 | 39.6 | 40.7 | 0.4% | 0.5% |
| Total Households | 7,317,755 | 7,717,376 | 7,623,810 | 0.4% | -0.2% |
| Average Household Size | 2.57 | 2.53 | 2.51 | -0.1% | -0.2% |
| Median Household Income | | \$ 79,320 | \$ 95,104 | | 3.7% |

Source: Esri, Census



Population Trends

The Webster BOA represents a relatively small area including only a handful of distinct residential neighborhoods.

From 2010 to 2022, the Webster BOA population increased by approximately 418 people. Compared to the existing population in 2010 of 767, this is a significant jump of approximately 55% (a 3.7% compound annual growth rate).

Total Population

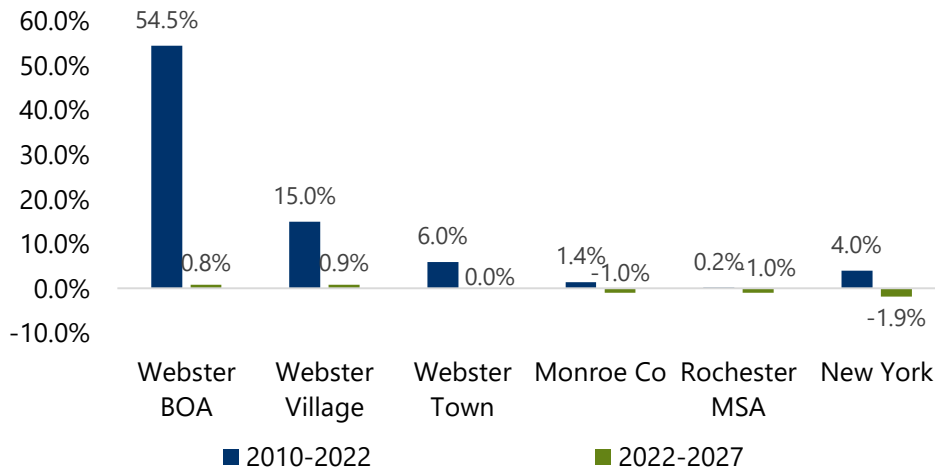
| Region | Population | | | Change | |
|-----------------|------------|------------|------------|-----------|-----------|
| | 2010 | 2022 | 2027 | 2010-2022 | 2022-2027 |
| Webster BOA | 767 | 1,185 | 1,195 | 54.5% | 0.8% |
| Webster Village | 4,984 | 5,731 | 5,780 | 15.0% | 0.9% |
| Webster Town | 42,641 | 45,199 | 45,180 | 6.0% | 0.0% |
| Monroe Co | 744,344 | 754,888 | 747,598 | 1.4% | -1.0% |
| Rochester MSA | 1,079,671 | 1,081,588 | 1,070,751 | 0.2% | -1.0% |
| New York | 19,378,102 | 20,154,573 | 19,778,809 | 4.0% | -1.9% |

Source: Decennial Census, Esri

The Webster BOA has significant portions of its boundary overlapping within the Village of Webster. The Village growth between 2010 and 2022 is also positive, but less dramatic. The Village increased population by 747 or 15% (a 1.2% compound annual growth rate). Many of the residential properties located in both the Webster BOA and the Village of Webster have been built since 2010 (this includes properties along Carriage Path Court and the area east of Charles E. Sexton Memorial Park). These new households represent a significant portion of the population increases to both the Webster BOA (418) and the Village of Webster (747). Population increases in the other geographies are more modest. None of the other areas saw population growth greater than 10% over the 12-year period.

Projected population growth is expected to slow based on recent trends. The Webster BOA (+0.8%) and the Village of Webster (+0.9%) have similar expected growth rates just below 1% for the next five years (2022 through 2027). The areas in the broader region and the state are expected to see flat or declining population growth.

Population Percent Change



Source: Decennial Census, Esri



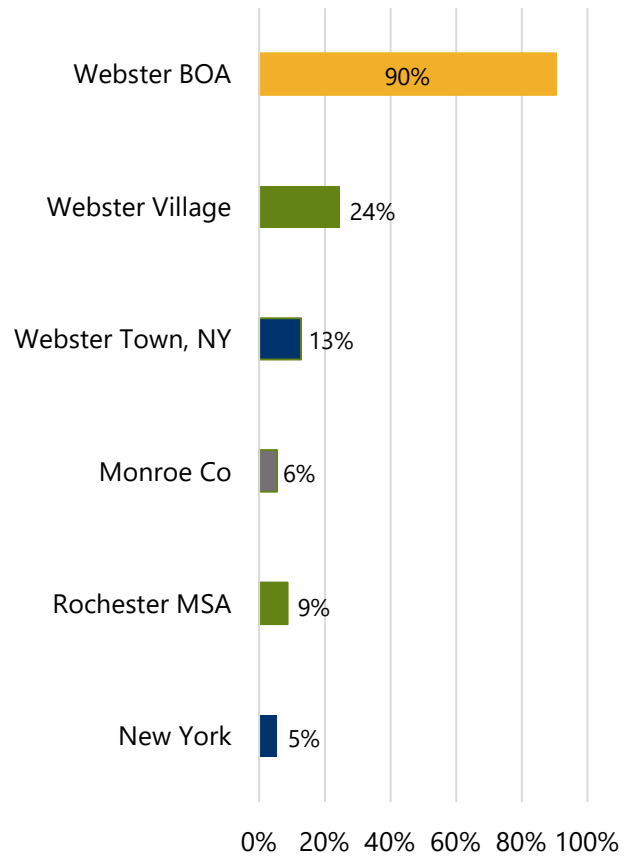
Household Trends

The Webster BOA had 305 households in 2010 according to the Decennial Census. This number increased to 581 according to ESRI’s estimate for 2022. The number of households is projected to grow by 593 from 2022 to 2027, but this growth will ultimately be dictated by the nature of future development in the BOA.

The Village of Webster is the next fastest growing, adding 534 households from 2010 to 2022, representing an increase of 24%.

Each comparative geographic area saw positive growth in households from 2010 to 2022. Each geography’s household increases outpace its more modest population growth. The Webster BOA’s household growth is nearly double its population growth (90% vs 55%). Even the Rochester MSA, with replacement-level population growth of just 0.2%, has increased households by 9% since 2010.

Percent Change in Households, 2010-2022



Source: Decennial Census, Esri

Total Households

| Geography | Households | | | Change | % Change |
|-----------------|------------|-----------|-----------|-----------|-----------|
| | 2010 | 2022 | 2027 | 2010-2022 | 2010-2022 |
| Webster BOA | 305 | 581 | 593 | 276 | 90% |
| Webster Village | 2,187 | 2,721 | 2,777 | 534 | 24% |
| Webster Town | 17,152 | 19,347 | 19,544 | 2,195 | 13% |
| Monroe Co | 300,422 | 316,982 | 316,889 | 16,560 | 6% |
| Rochester MSA | 414,096 | 450,215 | 450,206 | 36,119 | 9% |
| New York | 7,317,755 | 7,717,376 | 7,623,810 | 399,621 | 5% |

Source: Decennial Census, Esri



Household Size

The Webster BOA experienced a large drop in household size from 2010 to 2022. The average household shrank from 2.51 people in 2010 to 2.04 in 2022, a 19% decrease. This is more than double the decrease seen by the Village of Webster (-7.6%) or the Town of Webster (-6%). The average New York State household size shrank slightly in the 12 years since 2010; the decrease of 0.04 people per household represents less than a 2% reduction.

Average Household Size

| Geography | 2010 | 2022 | 2027 |
|-----------------|------|------|------|
| Webster BOA | 2.51 | 2.04 | 2.01 |
| Webster Village | 2.24 | 2.07 | 2.05 |
| Webster Town | 2.47 | 2.32 | 2.29 |
| Monroe Co | 2.39 | 2.29 | 2.27 |
| Rochester MSA | 2.42 | 2.31 | 2.29 |
| New York | 2.57 | 2.53 | 2.51 |

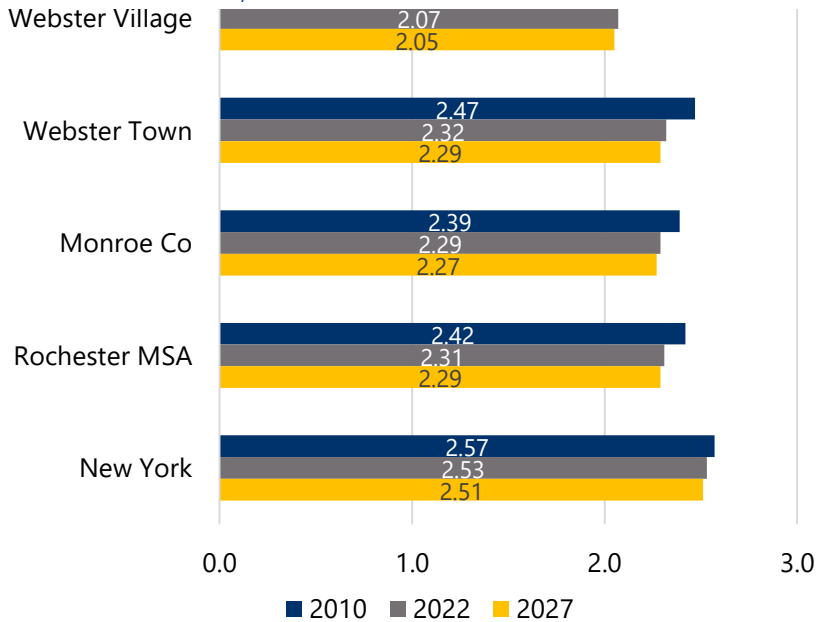
Source: Decennial Census, Esri

Household size is influenced by several demographic factors. The number of families, student populations, a young workforce, and immigrant populations all typically increase the size of households. Families where children move out and aging households typically decrease the size of households. Given the new residential development that occurred within the BOA from 2010 to 2022, the type of housing added to the BOA likely accounts for at least a portion of this decline in household size as additional smaller-sized households moved into the BOA.

Average Household Size

| Geography | 2010 | 2022 | 2027 |
|-----------------|------|------|------|
| Webster BOA | 2.51 | 2.04 | 2.01 |
| Webster Village | 2.24 | 2.07 | 2.05 |
| Webster Town | 2.47 | 2.32 | 2.29 |
| Monroe Co | 2.39 | 2.29 | 2.27 |
| Rochester MSA | 2.42 | 2.31 | 2.29 |
| New York | 2.57 | 2.53 | 2.51 |

Source: Decennial Census, Esri



Source: Decennial Census, Esri



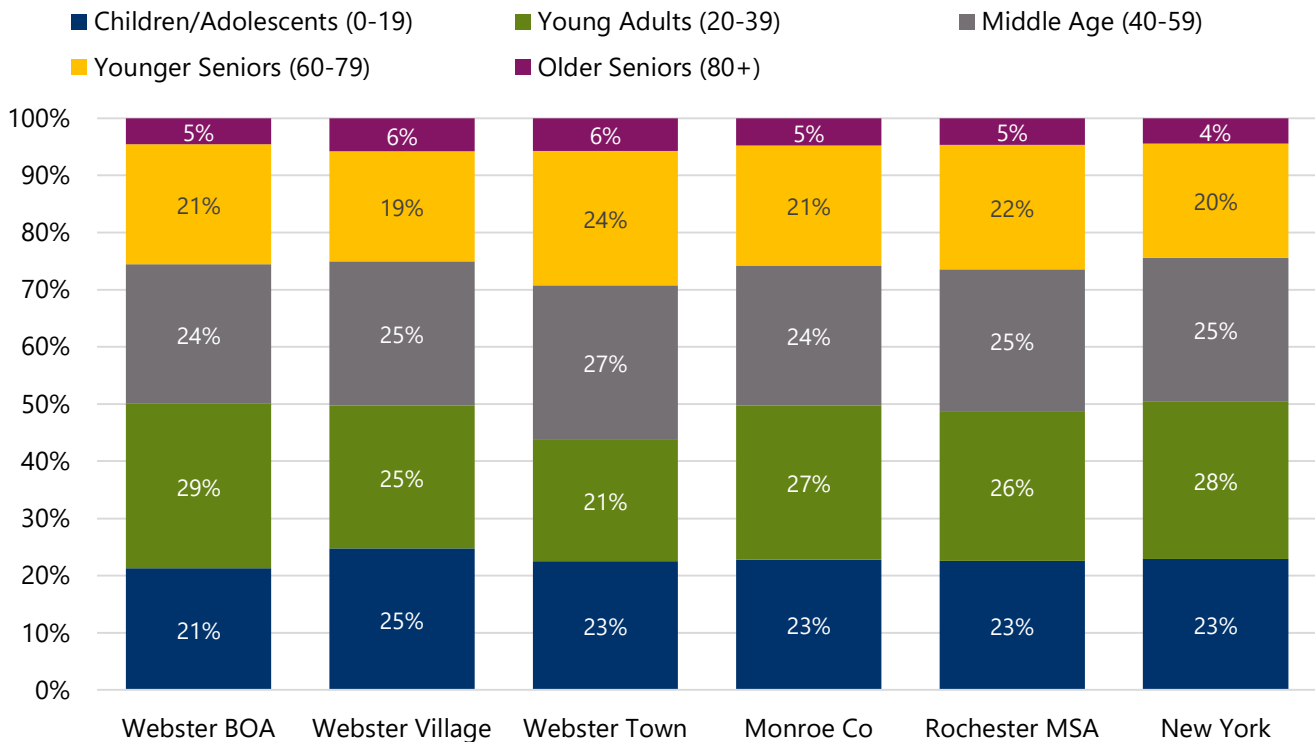
Age Distribution

The age distribution for the Webster BOA in 2022 shows a larger segment of young adults (ages 20–39) compared with the other geographic areas. The BOA has 29% of its residents in this age cohort, which is the highest of the local and regional comparison geographies and well above even the Village of Webster (25%) or the Town of Webster (21%).

The Webster BOA tracks closely with the rest of the geographic areas in the rest of the older age cohorts. Its middle-aged cohort (ages 40–59) is within a percentage point of all the areas except for the Town of Webster. Webster BOA senior cohorts are similar for both younger and older senior cohorts. The combined senior population share of 26% is similar to that in the other regions, which range from 24% to 27% except for the Town of Webster, where over 30% of its population are age 60 or older.

The other key demographic where the Webster BOA differs from the others is for people under the age of 20. This segment makes up only 21% of the Webster BOA total, which is 2 percentage points below the others and 4 percentage points below the Village of Webster.

Age Distribution by Cohort, 2022



Source: Esri



Median Age

Median age is a useful metric because it provides a snapshot of the age of a region. It is also a metric that can be easily compared across different regions. It reflects the broad trends of an area’s population and is less influenced by outliers than the average is.

The BOA’s median age in 2010 was one of the oldest of the comparative geographies. At 41.1, only the Town of Webster had a higher median age in 2010 at 42.9. Webster BOA added households and population at a significant rate between 2010 and 2022, and these generally younger new residents helped decrease the median age in the BOA by 1.2 years to 39.9. The median age of the BOA population is expected to increase only slightly over the next five years, which is on par with the surrounding region and the state.

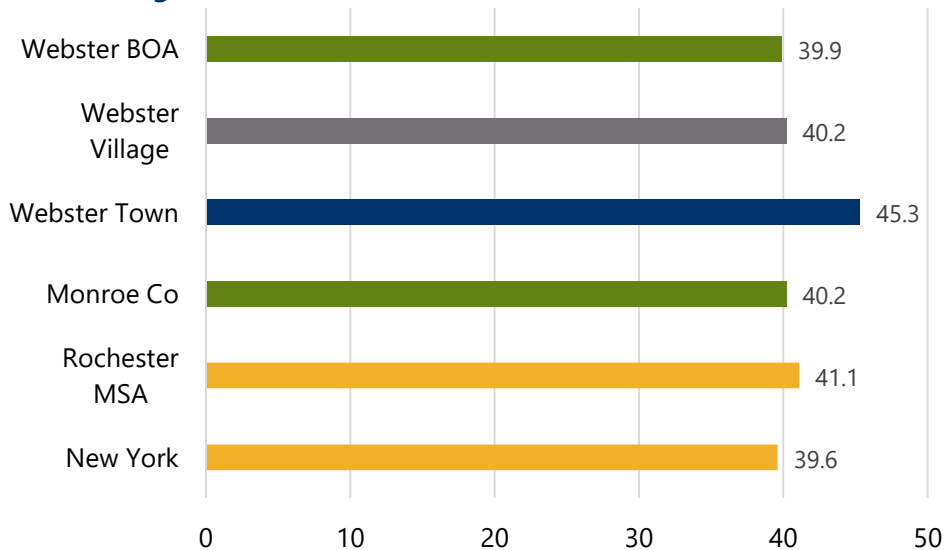
Overall, the BOA and Village populations skew significantly younger, which indicates potential to attract additional younger residents and potential market opportunities related to a relatively younger population base in the immediate BOA area.

Median Age

| Region | 2010 | 2022 | 2027 |
|-----------------|------|------|------|
| Webster BOA | 41.1 | 39.9 | 40.5 |
| Webster Village | 38.7 | 40.2 | 40.3 |
| Webster Town | 42.9 | 45.3 | 45.6 |
| Monroe Co | 38.3 | 40.2 | 40.9 |
| Rochester MSA | 39.3 | 41.1 | 41.8 |
| New York | 37.9 | 39.6 | 40.7 |

Source: Decennial Census, Esri

Median Age, 2022



Source: Decennial Census, Esri



Race and Ethnicity

Racial diversity is an important social goal, but it also improves economic development outcomes. Racial diversity can help to develop a range of skills and a talented workforce by attracting workers from different backgrounds. Having different backgrounds also increases rates for innovation and business formation. Businesses are often drawn to regions with a dynamic workforce and to consumer markets with a greater variety of demand.

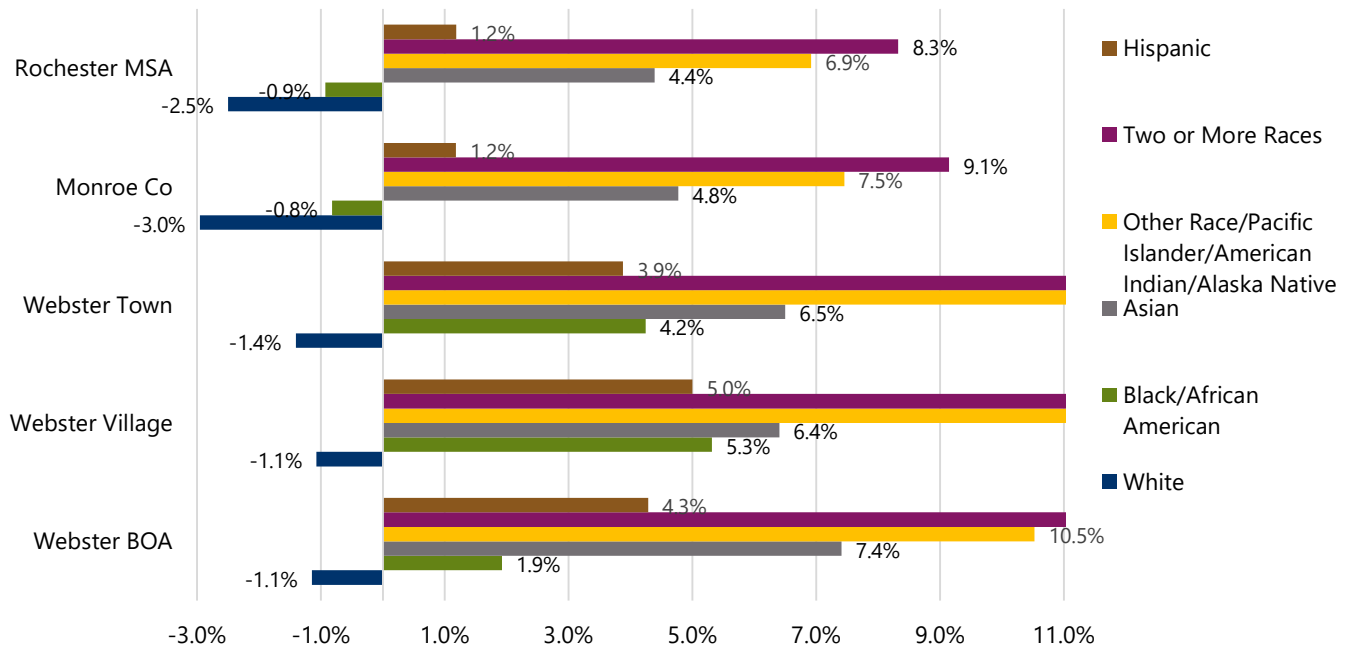
Population by Race, 2027

| Race Bracket | Webster BOA | Webster Village | Webster Town | Monroe Co | Rochester MSA | New York |
|-----------------------------------------------------------|-------------|-----------------|--------------|-----------|---------------|----------|
| White | 80% | 80% | 86% | 67% | 73% | 54% |
| Black/African American | 4% | 6% | 3% | 16% | 12% | 14% |
| Asian | 5% | 4% | 3% | 5% | 3% | 10% |
| Other Race/Pacific Islander/American Indian/Alaska Native | 2% | 2% | 1% | 4% | 4% | 12% |
| Two or More Races | 9% | 8% | 7% | 8% | 8% | 10% |

Source: Esri

The BOA is projected to have a higher non-White population than the Town of Webster in 2027 (80% vs 86%), but this share is the same or lower than every other comparative geography. The change in racial composition between 2022 and 2027 for the BOA shows a decline in its White population and growth in the other racial categories. However, these changes are smaller compared to some of the other geographic areas. The Webster BOA’s White population is projected to decline by 1.1%, compared to -3.0% for Monroe County.

Percent Change in Population by Race, 2022-2027



Note: Percents do not sum to 100%, as Hispanic Population can be any race

Source: Esri



Household Income

Household income is an important determinant for economic health and quality of life. Households with higher incomes have higher consumer spending and investment as well as the stability that comes from access to better housing, education, health, and other essential goods.

Household Income Distribution, 2022

| Income Bracket | Webster BOA | Webster Village | Webster Town | Monroe Co | Rochester MSA | New York |
|----------------------|-------------|-----------------|--------------|-----------|---------------|----------|
| less than \$15,000 | 3% | 6% | 4% | 9% | 9% | 10% |
| \$15,000-\$24,999 | 11% | 8% | 5% | 9% | 8% | 7% |
| \$25,000-\$34,999 | 9% | 8% | 6% | 8% | 8% | 7% |
| \$35,000-\$49,999 | 14% | 14% | 9% | 11% | 11% | 9% |
| \$50,000-\$74,999 | 21% | 17% | 15% | 17% | 18% | 14% |
| \$75,000-\$99,999 | 14% | 14% | 16% | 13% | 13% | 12% |
| \$100,000-\$149,999 | 17% | 20% | 23% | 17% | 17% | 17% |
| \$150,000-\$199,999 | 7% | 9% | 12% | 8% | 8% | 10% |
| \$200,000 or greater | 3% | 4% | 10% | 7% | 7% | 14% |

Source: Census ACS

The largest household income cohort in the Webster BOA is the range from \$50,000 to \$74,999, which included 21% of households in 2022. Not only is this the largest proportion for the BOA compared to other income ranges, but this cohort is also the largest in the BOA relative to any other region.

The other geographic areas have larger portions of their residents in higher-income cohorts than the Webster BOA. Every other area has a higher percentage of households with incomes greater than or equal to \$75,000. In turn, the Webster BOA has the largest portion of households with incomes below \$50,000. One reprieve is that the Webster BOA has the smallest share of households in the lowest income bracket (less than \$15,000).

Household Income Distribution, 2022



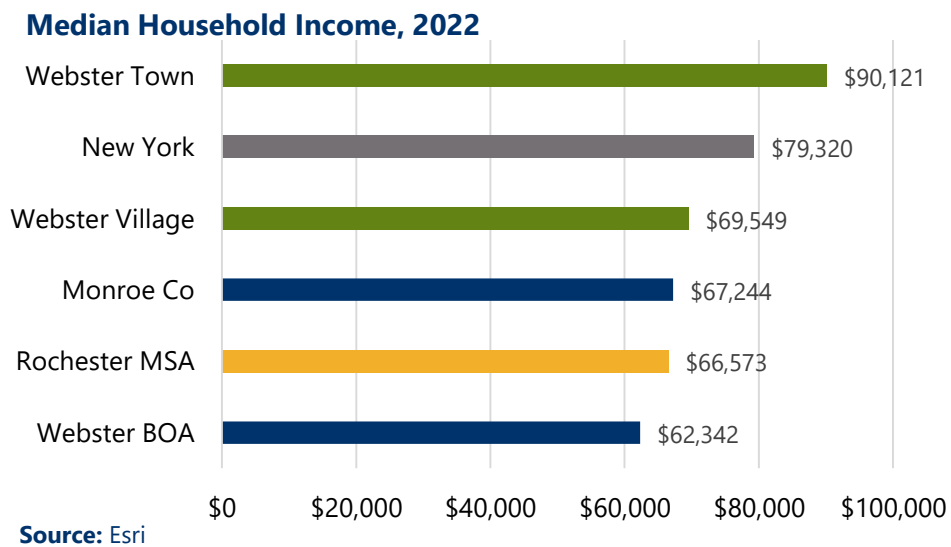
Source: Esri



Median Household Income

Median income functions in a similar way to median age but as a metric of household ability to earn. Its benefits are the same too, as it can be easily compared across different regions, and it reflects the broad trends of an area's population and is less influenced by outliers.

The median income for the Webster BOA in 2022 was \$62,342. This makes it the lowest ranked of the geographic areas. The Village also has a notably lower median household income compared to the surrounding Town. The Village of Webster has a poverty rate of 16.2%, which is more than three times the rate in the Town of Webster (5.3%) and even significantly higher than in Monroe County (13.7%) and the Rochester MSA (12.8%).



Educational Attainment

Higher educational attainment is correlated with greater workforce participation, greater labor productivity, higher innovation, and more involvement in business creation and other entrepreneurial activities.

Educational Attainment of Population 25+, 2022

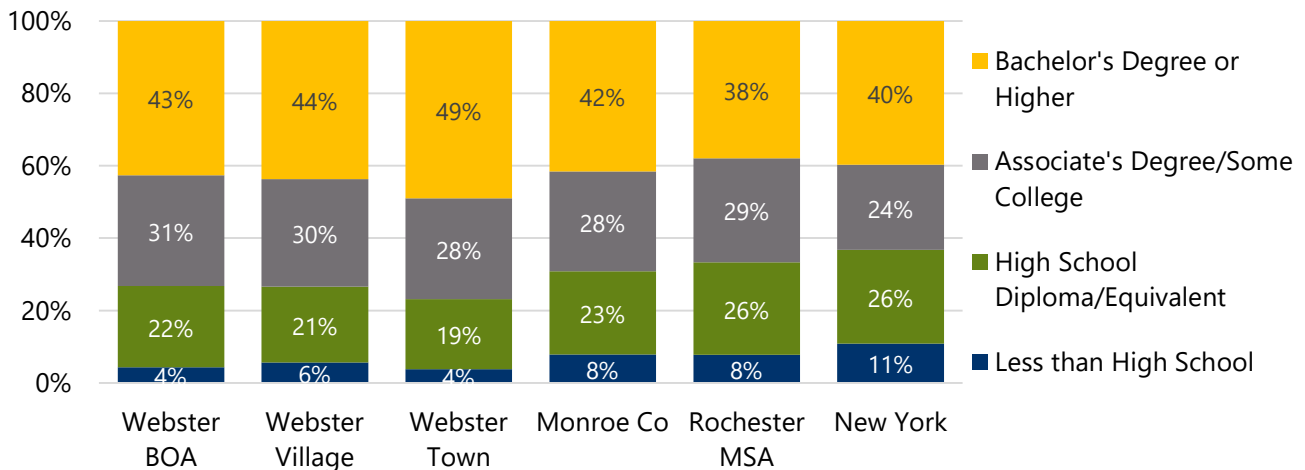
| Educational Attainment | Webster BOA | Webster Village | Webster Town | Monroe Co | Rochester MSA | New York |
|---------------------------------|-------------|-----------------|--------------|-------------|---------------|-------------|
| Less than High School | 4% | 6% | 4% | 8% | 8% | 11% |
| High School Diploma/Equivalent | 22% | 21% | 19% | 23% | 26% | 26% |
| Associate's Degree/Some College | 31% | 30% | 28% | 28% | 29% | 24% |
| Bachelor's Degree or Higher | 43% | 44% | 49% | 42% | 38% | 40% |
| Total | 100% | 100% | 100% | 100% | 100% | 100% |

Source: Esri

The Webster BOA outperforms all of the larger geographic areas in collegiate educational attainment. In 2022 73.3% of the Webster BOA population had attained either an associate’s or a bachelor’s degree (or higher). This is greater than Monroe County (69%), the Rochester MSA (67%), and New York State (63%). Both the Village of Webster (73.4%) and the Town of Webster (77%) have populations with higher educational attainment; this difference comes from higher rates of bachelor’s degree (or higher) attainment.

The Webster BOA also has a very low rate of residents without a high school diploma or equivalent. Only 4.4% of BOA residents lack this attainment, which makes it just above the Town of Webster’s 3.8% for lowest among the comparative areas.

Educational Attainment of Population 25+, 2022



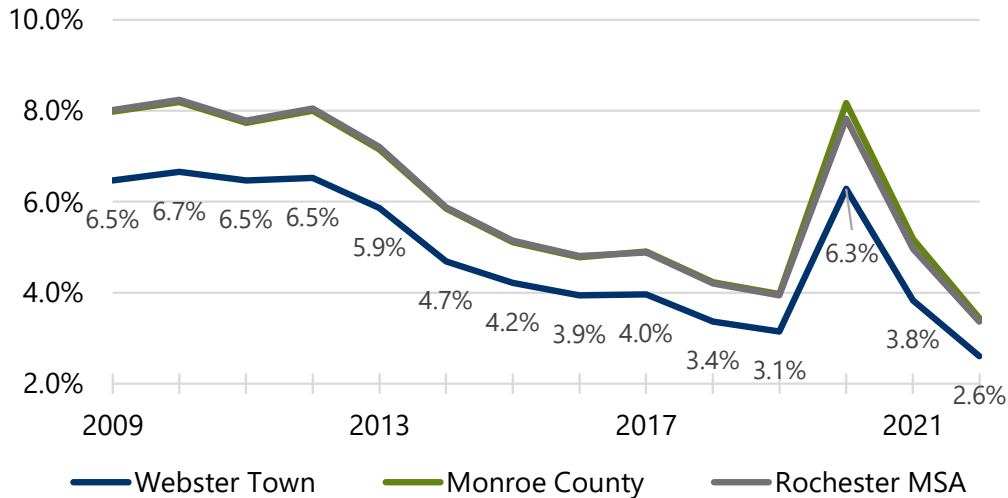
Source: Esri



Unemployment and Labor Force

The unemployment rate in the Town of Webster¹ reached 6.3% during the height of pandemic quarantine in 2020, but this was lower than the rates seen after the recession in 2009. Unemployment has fallen since 2020, reaching 2.6% in 2022. This is the tightest labor market for the Town of Webster in recent history, with the largest total employment (22,442) and the lowest unemployment rate (2.7%).

Unemployment Rate



Source: NY LAUS

Labor Force Metrics, Webster Town

| Year | Total Population | Labor Force | Employed Total | Unemployment Total | Unemployment Rate |
|------|------------------|-------------|----------------|--------------------|-------------------|
| 2010 | 41,662 | 22,158 | 20,683 | 1,483 | 6.7% |
| 2011 | 42,088 | 22,175 | 20,742 | 1,417 | 6.4% |
| 2012 | 42,649 | 22,358 | 20,900 | 1,442 | 6.4% |
| 2013 | 43,121 | 22,467 | 21,150 | 1,317 | 5.8% |
| 2014 | 43,402 | 21,875 | 20,850 | 1,008 | 4.7% |
| 2015 | 43,750 | 22,142 | 21,208 | 950 | 4.3% |
| 2016 | 44,084 | 22,408 | 21,525 | 867 | 4.0% |
| 2017 | 44,224 | 22,692 | 21,792 | 900 | 3.9% |
| 2018 | 44,247 | 23,025 | 22,250 | 783 | 3.4% |
| 2019 | 44,522 | 23,283 | 22,550 | 733 | 3.2% |
| 2020 | 44,876 | 22,942 | 21,500 | 1,433 | 6.3% |
| 2021 | 45,133 | 22,833 | 21,958 | 867 | 3.8% |
| 2022 | - | 23,042 | 22,442 | 608 | 2.7% |

Source: NY LAUS, Census ACS

¹ The Town of Webster is the lowest geography for which unemployment data are available.

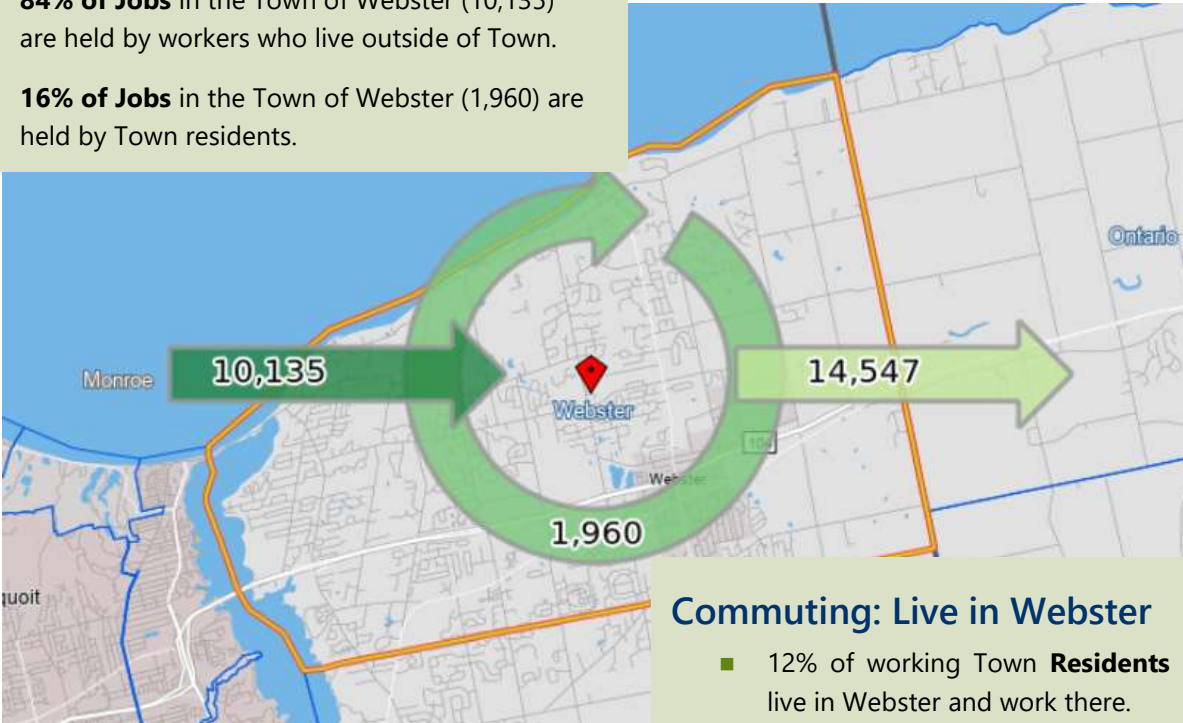


Commuting and Mobility

Using LEHD Origin and Destination Employment Statistics (LODES) from the US Census Bureau, the commuting patterns for those living in the Town of Webster or those traveling to work in the Town are shown in the following map. Data presented reflects commute patterns in 2020, the most recent available. In the wake of the pandemic, some of these trends may have changed.

Commuting: Work in Webster

- **84% of Jobs** in the Town of Webster (10,135) are held by workers who live outside of Town.
- **16% of Jobs** in the Town of Webster (1,960) are held by Town residents.



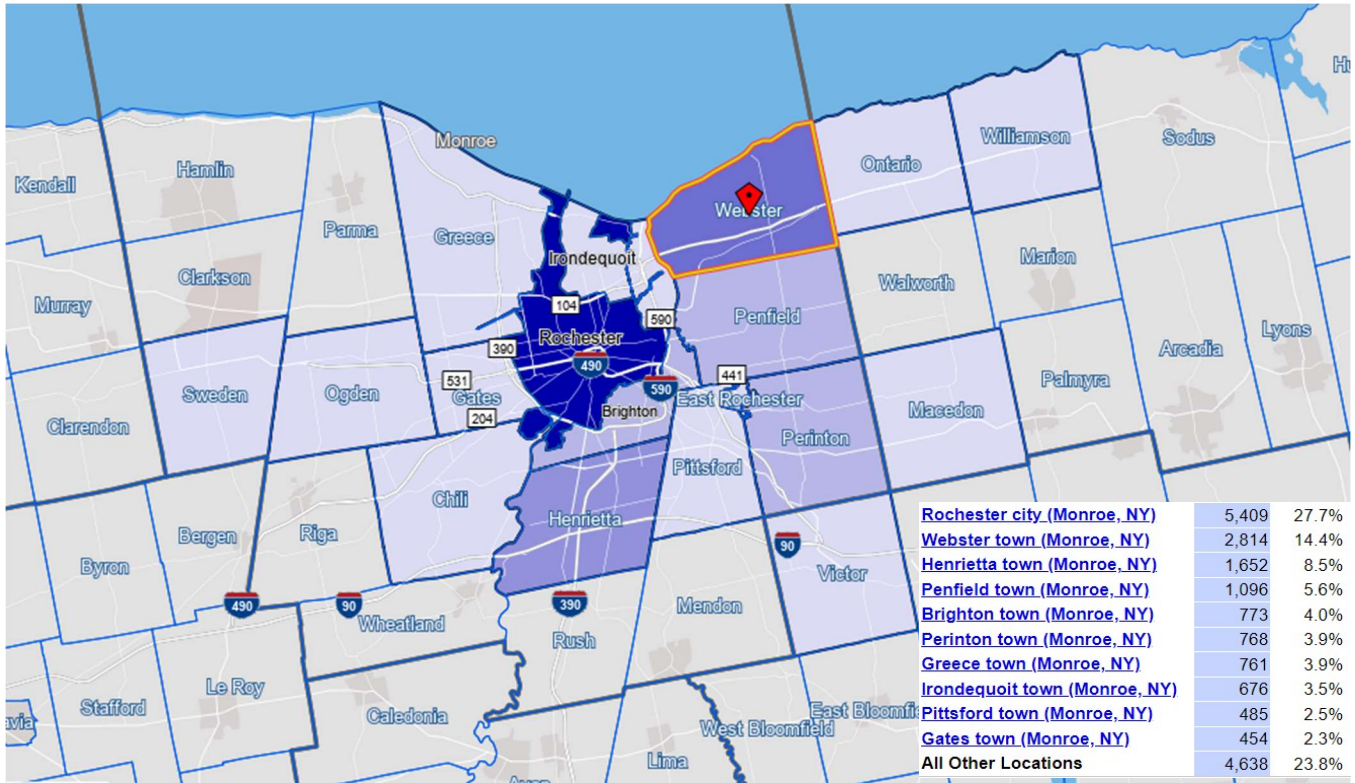
Commuting: Live in Webster

- 12% of working Town **Residents** (1,960) live in Webster and work there.
- 88% of working Town **Residents** (14,547) live in Webster and work elsewhere.

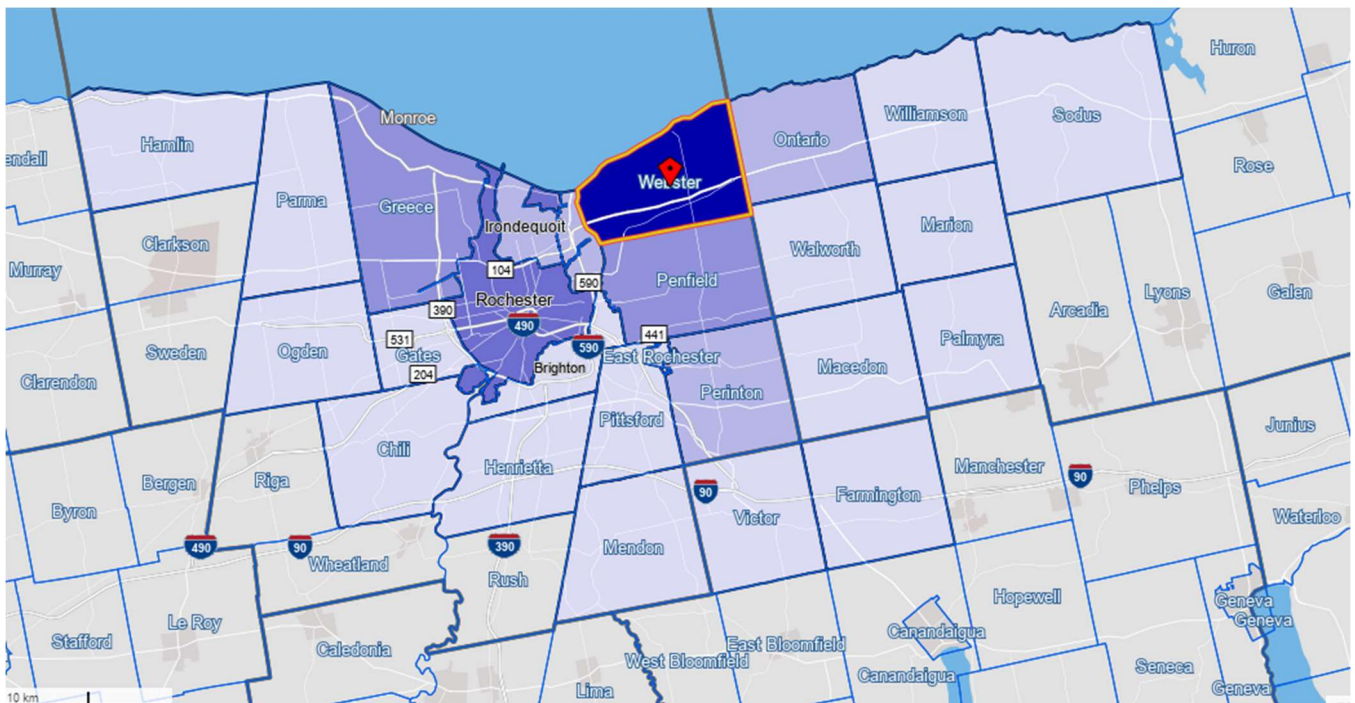
Relatively few local jobs are filled by workers who also live in the community. This is not uncommon, especially in smaller residential areas that are located next to metro areas that serve as the primary labor market. Market conditions often dictate both that employers are looking for a specific type of worker and that workers in the labor force are trained and targeting very specific kinds of jobs.

In the next two maps, these commuting flows are broken down by specific areas (county subdivisions) to give a detailed view of the geographic distribution. The map colorization indicates (1) the largest destinations for Town of Webster residents as well as (2) the largest areas of origin for workers who have jobs in the Town. The tables give detailed figures for these commuting flows.

Where residents work: Rochester is the primary work destination for Town of Webster residents. The next most common destinations are nearby towns accessible along the I-590 ring to the south and east.

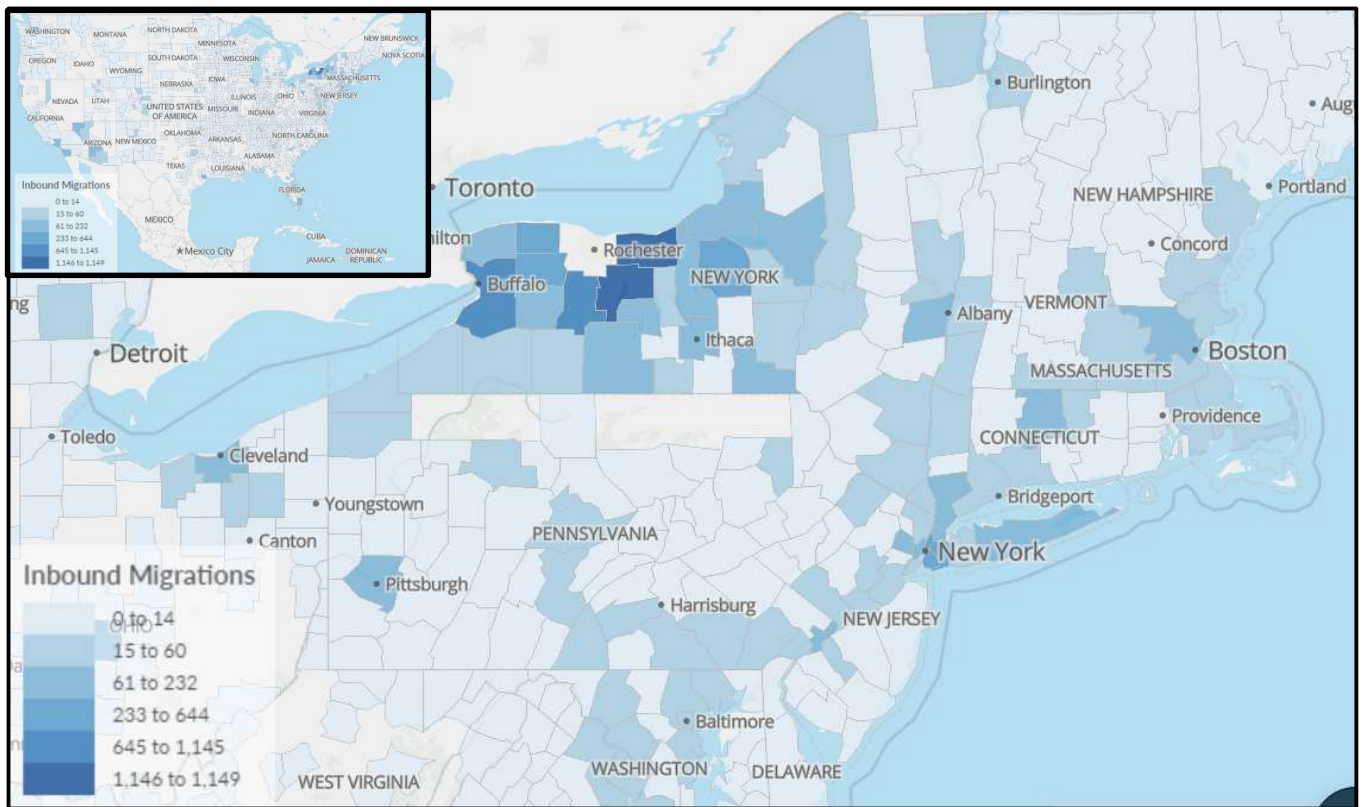


Where workers live: There's a wider distribution of where Town of Webster workers commute from. The largest location is the Town of Webster itself. Rochester is the next largest source of workers. There are key segments of workers who commute in from western locations like Greece and Irondequoit along with those connected by I-590.



Migration Trends

The more permanent change in location for residents of the area can be traced through county migration patterns available from Lightcast. These changes track migration across the country for residents migrating. In 2020, Wayne County, NY (1,149), Ontario County, NY (1,146), and Livingston County, NY (668) were the top three locations for inbound migration into Monroe County. The top three outbound migration destinations for Monroe County residents were also Ontario County (1,625), Wayne County (1,324), and Livingston County (740), which resulted in a total net loss of 725 residents to those counties.



4. ECONOMIC TRENDS

Key Findings

- **The Town of Webster, NY, lost 815 jobs (-4.0%) between 2017 and 2022.** These job losses are due to the COVID-19 pandemic. Before 2020, Webster saw steady positive job growth from 2012 to 2019. Webster's rate of job loss was slightly higher than Rochester (-3.6%) and almost double the loss realized by the State of New York (-1.9%).
- Although total jobs have not yet returned to pre-pandemic levels, **Webster is projected to grow by 2.3% from 2022 to 2027.** This positive job growth does, however, lag the Rochester MSA (2.6%) and State of New York (4.6%).
- **The industrial mix of Webster is characterized by Manufacturing, Retail, Health and Social Services, Accommodations & Food, and Construction.** These sectors represent higher proportions of local employment than in the Rochester MSA or State of New York. On the other end, Government and Educational Services have much lower shares in Webster compared to either the Rochester MSA or the State.
- **Webster's key sectors have seen mixed performance in the last five years,** with Construction showing significant growth in terms of the number of jobs (92) and percent change (7.0%). Health Care and Social Assistance has held steady with losing only 3 jobs (-0.1%) from 2017 to 2022. Arts, Entertainment, and Recreation (93 jobs) have added the most jobs from 2017 to 2022. The sectors that have the highest percent change of job loss are Government (-30.8%), Information (-28.0%) and Other Services (except Public Administration).
- **Webster's key sectors have seen mixed performance in the last five years,** with only Construction showing significant growth in both number of jobs and percentage growth. Health Care and Social Assistance has remained steady over the last five years. Arts, Entertainment, and Recreation have added the most jobs, while Manufacturing and Retail Trade are expected to continue to lose jobs through 2027.
- The top three occupations that are expected to add the most jobs through 2027 are **Food and Beverage Serving Workers (129), Home Health and Personal Care Aides (93), and Cooks and Food Preparation Workers (56).** On the other end, occupations that are expected to decline the most are Financial Specialist (-41), Metal Workers and Plastic Workers (-35), and Retail Sales Workers (-31).



Total Jobs, Change

The employment environment for an area indicates the extent to which there are new firms or existing firms that need more workers. This is an important part of economic development for the health of the local economy as well as an indicator of prospects for consumer demand.

The period between 2017 and 2022 is somewhat anomalous because of the impacts of the COVID-19 pandemic. The Town of Webster has seen a net decrease of 815 jobs since 2017, which represents a loss of 4%. This is the largest rate of job loss during this period compared to both the Rochester MSA (-3.6%) and the State of New York (-1.9%). However, the loss of demand, business closures, and economic hardship were a trend occurring across the US and globally.

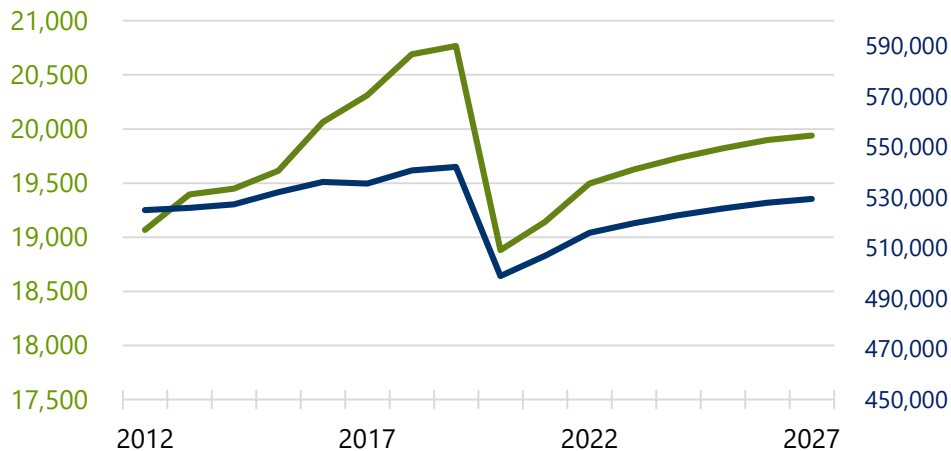
Employment for Webster and Comparative Geographies, 2017 - 2027

| Years | Webster | | Rochester MSA | New York State |
|-------------|---------|------------------|------------------|------------------|
| | Jobs | 5-Year Change, % | 5-Year Change, % | 5-Year Change, % |
| 2017 | 20,313 | | | |
| 2017 - 2022 | -815 | -4.0% | -3.6% | -1.9% |
| 2022 | 19,497 | | | |
| 2022 - 2027 | +444 | 2.3% | 2.6% | 4.6% |
| 2027 | 19,942 | | | |

The long-term trend for jobs in this area paints a more positive picture. First, it's clear that Webster was experiencing highly positive growth in the period through 2019, right up until the pandemic. Once quarantining mandates were lifted, Webster immediately began to bring back jobs, though it has not yet reached pre-pandemic levels.

Lightcast forecasts that Webster will create 444 net new jobs between 2022 and 2027, growing at a rate of 2.3% during this period.

Jobs, Webster vs Rochester MSA



Source: Lightcast



Jobs by Industry

Looking at a region's industrial mix offers insight into the types of companies that are located there and whether there are key business clusters that indicate important supply chain and labor force strengths. Comparing these concentrations to other geographies helps highlight local competitive advantages.

For Webster the key sectors are Manufacturing, Retail, Health Care and Social Assistance, Accommodation and Food Services, and Construction. Each of these broad sectors (defined by 2-digit NAICS codes) has a higher proportion of local employment compared to the Rochester MSA or contributes a significant share of total employment (Health Care and Social Assistance has a slightly smaller share than the Rochester MSA, but contributes more than one out of every seven jobs).

Two sectors that are typically key drivers of jobs, Government and Educational Services, are much lower in Webster compared to either the Rochester MSA or the State of New York.

Employment for Webster and Comparative Geographies, 2022

| Naics | Description | Webster | | Rochester MSA | New York State |
|--------------|--------------------------------------------------------------------------|---------------|-------------|---------------|----------------|
| | | Jobs | % of Total | % of Total | % of Total |
| 31 | Manufacturing | 3,863 | 20% | 11% | 4% |
| 44 | Retail Trade | 3,340 | 17% | 10% | 9% |
| 62 | Health Care and Social Assistance | 2,956 | 15% | 16% | 17% |
| 72 | Accommodation and Food Services | 2,735 | 14% | 7% | 7% |
| 23 | Construction | 1,406 | 7% | 5% | 5% |
| 54 | Professional, Scientific, and Technical Services | 1,163 | 6% | 5% | 8% |
| 71 | Arts, Entertainment, and Recreation | 948 | 5% | 2% | 2% |
| 56 | Administrative and Support and Waste Management and Remediation Services | 695 | 4% | 5% | 5% |
| 53 | Real Estate and Rental and Leasing | 406 | 2% | 1% | 2% |
| 81 | Other Services (except Public Administration) | 362 | 2% | 4% | 5% |
| 52 | Finance and Insurance | 357 | 2% | 3% | 5% |
| 55 | Management of Companies and Enterprises | 293 | 2% | 2% | 1% |
| 90 | Government | 282 | 1% | 14% | 15% |
| 42 | Wholesale Trade | 280 | 1% | 3% | 3% |
| 61 | Educational Services | 178 | 1% | 7% | 5% |
| 51 | Information | 111 | 1% | 1% | 3% |
| 48 | Transportation and Warehousing | 48 | 0% | 3% | 3% |
| 11 | Agriculture, Forestry, Fishing and Hunting | 26 | 0% | 1% | 0% |
| 21 | Mining, Quarrying, and Oil and Gas Extraction | 22 | 0% | 0% | 0% |
| 22 | Utilities | 19 | 0% | 0% | 0% |
| 99 | Unclassified Industry | 9 | 0% | 0% | 1% |
| Total | | 19,497 | 100% | 100% | 100% |

Source: Lightcast



Jobs Change by Industry

Webster’s key sectors have had mixed performance for growth over the last five years. Among the five listed above, only Construction shows significant growth. That sector added nearly 100 jobs between 2017 and 2022, an increase of 7%. Health Care and Social Assistance was steady (losing only three jobs).

Every other key sector saw significant job loss from 2017 to 2022. Manufacturing is following national trends of declining employment with a decrease of 4.4%. The pandemic has had adverse effects on both Retail Trade (4.7% decrease) and Accommodations and Food Services (7.2% decrease).

Just outside these top sectors is Arts, Entertainment and Recreation, which added the most jobs (+93) over the five-year period. Finance and Insurance and Educational Services also added jobs in significant numbers.

Expected future trends look better for most sectors. Growth for Arts, Entertainment, and Recreation is expected to continue, and most of the largest sectors are set to bring back previous losses and new jobs alike. Manufacturing and Retail Trade, on the other hand, face structural challenges and are expected to continue to lose jobs through 2027.

Employment Change By Industry for Webster, 2017 - 2027

| Naics | Description | Jobs | | | Jobs Change, % | |
|--------------|--------------------------------------------------------------------------|---------------|---------------|---------------|----------------|-------------|
| | | 2017 | 2022 | 2027 | 2017 - 2022 | 2022 - 2027 |
| 31 | Manufacturing | 4,041 | 3,863 | 3,740 | -4.4% | -3.2% |
| 44 | Retail Trade | 3,506 | 3,340 | 3,298 | -4.7% | -1.2% |
| 62 | Health Care and Social Assistance | 2,959 | 2,956 | 3,171 | -0.1% | 7.3% |
| 72 | Accommodation and Food Services | 2,948 | 2,735 | 2,961 | -7.2% | 8.3% |
| 23 | Construction | 1,314 | 1,406 | 1,462 | 7.0% | 4.0% |
| 54 | Professional, Scientific, and Technical Services | 1,206 | 1,163 | 1,213 | -3.6% | 4.3% |
| 71 | Arts, Entertainment, and Recreation | 855 | 948 | 1,084 | 10.9% | 14.4% |
| 56 | Administrative and Support and Waste Management and Remediation Services | 826 | 695 | 652 | -15.8% | -6.2% |
| 53 | Real Estate and Rental and Leasing | 440 | 406 | 402 | -7.6% | -1.0% |
| 81 | Other Services (except Public Administration) | 463 | 362 | 366 | -21.9% | 1.3% |
| 52 | Finance and Insurance | 324 | 357 | 369 | 10.1% | 3.3% |
| 55 | Management of Companies and Enterprises | 298 | 293 | 305 | -1.6% | 4.0% |
| 90 | Government | 408 | 282 | 231 | -30.8% | -18.2% |
| 42 | Wholesale Trade | 308 | 280 | 263 | -9.3% | -6.1% |
| 61 | Educational Services | 155 | 178 | 197 | 14.7% | 10.4% |
| 51 | Information | 154 | 111 | 90 | -28.0% | -19.1% |
| 48 | Transportation and Warehousing | 37 | 48 | 55 | 27.6% | 15.7% |
| 11 | Agriculture, Forestry, Fishing and Hunting | 29 | 26 | 27 | -8.3% | 4.4% |
| 21 | Mining, Quarrying, and Oil and Gas Extraction | 20 | 22 | 24 | 13.8% | 10.1% |
| 22 | Utilities | 20 | 19 | 18 | -5.0% | -3.6% |
| 99 | Unclassified Industry | 2 | 9 | 13 | 329.7% | 47.6% |
| Total | | 20,313 | 19,497 | 19,942 | -4% | 2% |

Source: Lightcast



Jobs by Opportunity Sectors

Summary-level job trends help indicate the direction key sectors have been moving in recent years and how they are projected to change in the near future. Looking at more detailed subsectors within the largest employing sectors in the area shows the more specific types of business activity that are driving those changes.

This table looks at projected job growth for the largest 4-digit subsectors in each of the largest 2-digit sectors.

Employment Change By Key Industries in Webster, 2022 - 2027

| NAICS | Description | Jobs | | Jobs Change | |
|------------------------------|------------------------------------------------------------------------|-------|-------|-------------|----------------|
| | | 2022 | 2027 | 2022 - 2027 | 2022 - 2027, % |
| Construction | | | | | |
| 2382 | Building Equipment Contractors | 504 | 540 | 35 | 7.0% |
| 2362 | Nonresidential Building Construction | 394 | 384 | (10) | -2.6% |
| 2389 | Other Specialty Trade Contractors | 150 | 180 | 30 | 19.9% |
| 2383 | Building Finishing Contractors | 122 | 128 | 6 | 5.0% |
| 2381 | Foundation, Structure, and Building Exterior Contractors | 108 | 121 | 13 | 11.6% |
| Manufacturing | | | | | |
| 3342 | Communications Equipment Manufacturing | 1,882 | 1,973 | 91 | 4.8% |
| 3363 | Motor Vehicle Parts Manufacturing | 474 | 442 | (32) | -6.8% |
| 3323 | Architectural and Structural Metals Manufacturing | 264 | 232 | (32) | -12.1% |
| 3231 | Printing and Related Support Activities | 177 | 136 | (40) | -22.8% |
| 3339 | Other General Purpose Machinery Manufacturing | 125 | 89 | (36) | -28.4% |
| Retail | | | | | |
| 4411 | Automobile Dealers | 560 | 592 | 32 | 5.7% |
| 4451 | Grocery Stores | 405 | 369 | (36) | -8.8% |
| 4522 | Department Stores | 388 | 355 | (33) | -8.6% |
| 4523 | General Merchandise Stores, including Warehouse Clubs and Supercenters | 367 | 402 | 35 | 9.4% |
| 4441 | Building Material and Supplies Dealers | 338 | 357 | 19 | 5.7% |
| Health | | | | | |
| 6216 | Home Health Care Services | 514 | 558 | 45 | 8.7% |
| 6241 | Individual and Family Services | 420 | 491 | 71 | 17.0% |
| 6231 | Nursing Care Facilities (Skilled Nursing Facilities) | 357 | 340 | (17) | -4.7% |
| 6232 | Residential Disability, Mental Health, and Substance Abuse Facilities | 326 | 308 | (18) | -5.6% |
| 6212 | Offices of Dentists | 222 | 254 | 32 | 14.5% |
| Food & Recreation | | | | | |
| 7225 | Restaurants and Other Eating Places | 2,555 | 2,781 | 225 | 8.8% |
| 7139 | Other Amusement and Recreation Industries | 784 | 919 | 135 | 17.3% |
| 7224 | Drinking Places (Alcoholic Beverages) | 100 | 120 | 20 | 19.7% |
| 7111 | Performing Arts Companies | 74 | 66 | (8) | -10.7% |
| 7112 | Spectator Sports | 69 | 77 | 8 | 12.1% |

Source: Lightcast



Jobs by Industry Detail

Summary-level job trends, where jobs are reported at 2-digit NAICS codes, help indicate the direction key sectors have been moving in recent years and how much they contribute to the local economy. Here, however, economic activity is reported at the most detailed level of industry, 6-digit NAICS codes. This provides insight into the specific types of firms and jobs are in the area.

The two largest 6-digit NAICS industries have nearly 2,000 jobs each, Limited-Service Restaurants and Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing. Full-Service Restaurants is the third largest industry, emphasizing the role of food service in the Town of Webster's economy.

The rest of the top 20 industries are within 300 jobs of each other. They are a mix of (1) retail services like New Car Dealers, Department Stores, Supermarkets, and Warehouse Clubs; (2) health services like Home Health Care Services, Nursing Care Facilities (Skilled Nursing Facilities), Services for the Elderly and Persons with Disabilities, and Residential Mental Health and Substance Abuse Facilities; and (3) professional services like Temporary Help Services, Corporate, Subsidiary, and Regional Managing Offices, Engineering Services, and Direct Health and Medical Insurance Carriers.

Top 20 Largest Industries (6-digit NAICS), Webster Town, 2022

| NAICS | Description | Jobs |
|--------|---------------------------------------------------------------------------------------|-------|
| 722513 | Limited-Service Restaurants | 1,920 |
| 334220 | Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing | 1,882 |
| 722511 | Full-Service Restaurants | 629 |
| 441110 | New Car Dealers | 524 |
| 621610 | Home Health Care Services | 514 |
| 713940 | Fitness and Recreational Sports Centers | 428 |
| 561320 | Temporary Help Services | 392 |
| 452210 | Department Stores | 388 |
| 445110 | Supermarkets and Other Grocery (except Convenience) Stores | 375 |
| 236220 | Commercial and Institutional Building Construction | 370 |
| 238220 | Plumbing, Heating, and Air-Conditioning Contractors | 362 |
| 623110 | Nursing Care Facilities (Skilled Nursing Facilities) | 357 |
| 551114 | Corporate, Subsidiary, and Regional Managing Offices | 292 |
| 713910 | Golf Courses and Country Clubs | 290 |
| 624120 | Services for the Elderly and Persons with Disabilities | 268 |
| 541330 | Engineering Services | 262 |
| 623220 | Residential Mental Health and Substance Abuse Facilities | 260 |
| 524114 | Direct Health and Medical Insurance Carriers | 252 |
| 452311 | Warehouse Clubs and Supercenters | 250 |
| 332322 | Sheet Metal Work Manufacturing | 236 |

Source: Lightcast



Job Change by Industry Detail

There is significant overlap between some of the largest industries and some of the fastest-growing industries in the Town of Webster. Foremost, the Television Broadcasting and Wireless Communications Equipment Manufacturing industry added 657 jobs between 2017 and 2022, which is nearly half (42%) of the job growth from the top 20 industries listed below.

Other industries that are both large and growing include Engineering Services, Fitness and Recreational Sports Centers, Direct Health and Medical Insurance Carriers, Plumbing, Heating, and Air-Conditioning Contractors, Services for the Elderly and Persons with Disabilities, Golf Courses and Country Clubs, and Limited-Service Restaurants.

Top 20 Fastest Growing Industries (6-digit NAICS), Webster Town

| NAICS | Description | Jobs, 2017 - 2022 |
|--------|---------------------------------------------------------------------------------------|-------------------|
| 334220 | Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing | +657 |
| 336390 | Other Motor Vehicle Parts Manufacturing | +84 |
| 541330 | Engineering Services | +73 |
| 713940 | Fitness and Recreational Sports Centers | +68 |
| 524114 | Direct Health and Medical Insurance Carriers | +60 |
| 238220 | Plumbing, Heating, and Air-Conditioning Contractors | +59 |
| 624120 | Services for the Elderly and Persons with Disabilities | +55 |
| 713910 | Golf Courses and Country Clubs | +50 |
| 325620 | Toilet Preparation Manufacturing | +50 |
| 624190 | Other Individual and Family Services | +49 |
| 722513 | Limited-Service Restaurants | +48 |
| 541611 | Administrative Management and General Management Consulting Services | +43 |
| 327110 | Pottery, Ceramics, and Plumbing Fixture Manufacturing | +40 |
| 541940 | Veterinary Services | +37 |
| 444110 | Home Centers | +37 |
| 238910 | Site Preparation Contractors | +34 |
| 621210 | Offices of Dentists | +31 |
| 623311 | Continuing Care Retirement Communities | +27 |
| 621493 | Freestanding Ambulatory Surgical and Emergency Centers | +27 |
| 623990 | Other Residential Care Facilities | +26 |

Source: Lightcast



Industry Concentration, by Industry Detail

The location quotient (LQ) of a type of economic activity compares the local concentration (e.g., industry jobs divided by total jobs) to the national average for the same industry. This ratio tells which industries are more (or less) concentrated in the region compared with the US, and highlights areas that indicate a local competitive advantage.

The top industries by concentration in the Town of Webster differ completely from the previous list of fastest-growing industries. Almost all the highly concentrated industries (17 of 20 or 85%) are manufacturing activities. The recent growth in Television Broadcasting and Wireless Communications Equipment Manufacturing is highlighted again. However, there are numerous other types of manufacturing, all of which are approximately 10 times as concentrated, or more, as the US average.

Top 20 Most Concentrated Industries (6-digit NAICS), Webster Town, 2022

| NAICS | Description | Location Quotient |
|--------|---------------------------------------------------------------------------------------|-------------------|
| 334220 | Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing | 306.3 |
| 333994 | Industrial Process Furnace and Oven Manufacturing | 61.9 |
| 333316 | Photographic and Photocopying Equipment Manufacturing | 45.5 |
| 339940 | Office Supplies (except Paper) Manufacturing | 39.8 |
| 327110 | Pottery, Ceramics, and Plumbing Fixture Manufacturing | 25.1 |
| 333519 | Rolling Mill and Other Metalworking Machinery Manufacturing | 24.8 |
| 336360 | Motor Vehicle Seating and Interior Trim Manufacturing | 22.5 |
| 336310 | Motor Vehicle Gasoline Engine and Engine Parts Manufacturing | 21.2 |
| 334515 | Instrument Manufacturing for Measuring and Testing Electricity and Electrical Signals | 18.5 |
| 332322 | Sheet Metal Work Manufacturing | 17.6 |
| 337122 | Nonupholstered Wood Household Furniture Manufacturing | 13.2 |
| 711120 | Dance Companies | 13.0 |
| 325612 | Polish and Other Sanitation Good Manufacturing | 12.5 |
| 334517 | Irradiation Apparatus Manufacturing | 12.5 |
| 315190 | Other Apparel Knitting Mills | 12.2 |
| 325992 | Photographic Film, Paper, Plate, and Chemical Manufacturing | 11.2 |
| 332410 | Power Boiler and Heat Exchanger Manufacturing | 10.8 |
| 532420 | Office Machinery and Equipment Rental and Leasing | 10.7 |
| 541214 | Payroll Services | 9.7 |
| 333314 | Optical Instrument and Lens Manufacturing | 9.7 |

Source: Lightcast



Industry Concentration, by Industry Detail (Rochester MSA)

Industrial activity and trade are often regional in their connections to other firms of the same type and supplying industries. Industry concentration for the Rochester MSA shows opportunity industries that may create a cluster with activity in the Town of Webster or provide an opportunity for future growth.

The following sectors are high-concentration industries in the Town of Webster and are among the top 10 most concentrated industries in the surrounding metro area: Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing, Photographic and Photocopying Equipment Manufacturing, Rolling Mill and Other Metalworking Machinery Manufacturing, Irradiation Apparatus Manufacturing, Photographic Film, Paper, Plate, and Chemical Manufacturing, and Optical Instrument and Lens Manufacturing. The Office Machinery and Equipment Rental and Leasing industry is also in the top 20 for both regions.

Top 20 Most Concentrated Industries (6-digit NAICS), Rochester MSA, 2022

| NAICS | Description | Location Quotient |
|--------|---------------------------------------------------------------------------------------|-------------------|
| 333316 | Photographic and Photocopying Equipment Manufacturing | 109.3 |
| 325992 | Photographic Film, Paper, Plate, and Chemical Manufacturing | 75.9 |
| 212393 | Other Chemical and Fertilizer Mineral Mining | 35.3 |
| 334220 | Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing | 23.8 |
| 339115 | Ophthalmic Goods Manufacturing | 20.4 |
| 333314 | Optical Instrument and Lens Manufacturing | 19.4 |
| 333519 | Rolling Mill and Other Metalworking Machinery Manufacturing | 16.5 |
| 334517 | Irradiation Apparatus Manufacturing | 13.6 |
| 311930 | Flavoring Syrup and Concentrate Manufacturing | 11.0 |
| 326140 | Polystyrene Foam Product Manufacturing | 9.5 |
| 532420 | Office Machinery and Equipment Rental and Leasing | 9.3 |
| 333923 | Overhead Traveling Crane, Hoist, and Monorail System Manufacturing | 8.9 |
| 335912 | Primary Battery Manufacturing | 8.4 |
| 332721 | Precision Turned Product Manufacturing | 7.9 |
| 326112 | Plastics Packaging Film and Sheet (including Laminated) Manufacturing | 7.4 |
| 311421 | Fruit and Vegetable Canning | 7.0 |
| 334418 | Printed Circuit Assembly (Electronic Assembly) Manufacturing | 6.7 |
| 334416 | Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing | 6.5 |
| 525120 | Health and Welfare Funds | 6.2 |
| 311813 | Frozen Cakes, Pies, and Other Pastries Manufacturing | 6.0 |

Source: Lightcast



Regional Opportunity Sectors

The Town of Webster's current mix of subsectors reveals important types of economic opportunity. Although the reuse vision for the Webster BOA is evolving, it should consider additional support for these types of businesses based on recent growth.

- **Communications Equipment Manufacturing:** This subsector is forecasted to add 91 jobs by 2027. This subsector is also expected to grow over this period in the Rochester MSA area, where the average earnings for these jobs will be over \$125,000 annually. High-value manufacturing jobs in areas of growth should be near the top of the list for this project.
- **Food and Recreation:** These two subsectors have the largest projected job gains between 2022 and 2027. Part of this is driven by recovered jobs that were lost during the pandemic. However, the Town of Webster has already established itself as a destination in this way, with nearly double the jobs level for this sector compared to Rochester or New York State. Food and recreation may be part of the more basic core industries of a downtown, but they also help drive foot traffic, help to develop adjacent service industries, build the brand of a place, and help capture tourism revenue.
- **Health Services:** The three fastest-growing subsectors out of the top five (home care, family services and dentists) are expected to add nearly 150 jobs in the next five years. These are the top examples in a highly diversified service sector that is expected to grow due to an aging population that will have increased demands for care. Health services offer a range of occupational types, and providers are increasingly finding high-cost institutional space is not necessary for their needs. This means expansion into retail and flex space can be an option that allows firms to scale up more quickly to meet demand.
- **Construction Contractors (various):** There is a national shortage of construction trade workers that is especially acute in markets that are high growth or that have an aging workforce with low replacement rates. There can be market cycles that favor subsets of the different types of contractors, but it is more typical that the demand for contractors of all kinds ebbs and flows with the residential real estate market. Although interest rates have taken some of the pressure off housing prices, there is still significant demand for home improvements as well as latent demand for projects that were pushed out during boom periods in the last three years.
- **Retail:** Pandemic impacts on in-person shopping have mostly dissipated. However, the adoption of online shopping that the pandemic accelerated has continued to erode demand for retail spending in traditional bricks-and-mortar locations. The subsectors of retail that are predicted to grow through 2027 reflect spending on or maintenance of substantial physical assets like a home (Building Materials and Supplies Dealers) or a car (Automobile Dealers). The last category forecasted to add jobs is Supercenters and Warehouse Clubs that use their supply chain advantages to compete on price with e-commerce outlets.



Workers by Occupation

The largest occupational category for workers in Webster is Food Preparation and Serving Related workers. These jobs represent nearly twice the share of jobs in Webster as in the Rochester MSA. The next two largest occupations are office-related sectors, Sales and Related workers and Office and Administrative Support workers. Together these two types of jobs make up more than one out of every five jobs in the region.

There are three other categories of jobs that number more than 1,000 where the proportion for Webster is greater than that of the Rochester MSA: Production workers, Healthcare Support workers, and Business and Financial Operators.

Workers for Webster and Comparative Geographies, 2022

| SOC | Description | Webster | Rochester | |
|--------------|------------------------------------------------|---------------|-------------|-------------|
| | | Workers | % of Total | |
| 35 | Food Preparation and Serving Related | 2,741 | 14% | 8% |
| 41 | Sales and Related | 2,394 | 12% | 9% |
| 43 | Office and Administrative Support | 1,977 | 10% | 13% |
| 51 | Production | 1,798 | 9% | 7% |
| 31 | Healthcare Support | 1,140 | 6% | 5% |
| 53 | Transportation and Material Moving | 1,110 | 6% | 7% |
| 13 | Business and Financial Operations | 1,090 | 6% | 5% |
| 11 | Management | 1,071 | 5% | 6% |
| 47 | Construction and Extraction | 957 | 5% | 4% |
| 29 | Healthcare Practitioners and Technical | 856 | 4% | 6% |
| 49 | Installation, Maintenance, and Repair | 776 | 4% | 4% |
| 39 | Personal Care and Service | 686 | 4% | 2% |
| 17 | Architecture and Engineering | 605 | 3% | 2% |
| 15 | Computer and Mathematical | 578 | 3% | 3% |
| 37 | Building and Grounds Cleaning and Maintenance | 446 | 2% | 3% |
| 21 | Community and Social Service | 371 | 2% | 2% |
| 25 | Educational Instruction and Library | 368 | 2% | 9% |
| 27 | Arts, Design, Entertainment, Sports, and Media | 276 | 1% | 1% |
| 33 | Protective Service | 111 | 1% | 2% |
| 19 | Life, Physical, and Social Science | 72 | 0% | 1% |
| 23 | Legal | 52 | 0% | 1% |
| 45 | Farming, Fishing, and Forestry | 23 | 0% | 1% |
| Total | | 19,497 | 100% | 100% |

Source: Lightcast



Change in Workers by Occupation, Detail

Occupational data exists at more detailed levels, which allows for a more granular understanding of job types and changes in labor demand. The table below evaluates forecasted changes in occupations for Webster and the Rochester MSA at the 3-digit SOC (Standard Occupational Classification) level by highlighting those types of occupations that are expected to see the largest increases and decreases in the next five years.

The six occupations that are expected to add the most jobs through 2027 feature three Food Services jobs and three Health Services jobs. Food and Beverage Serving Workers have the largest increase, predicted to add 129 jobs or +7.4%.

After these occupations is Construction Trades Workers, which are expected to increase by over 10% during this period. Two high-demand technical occupations, Engineers and Computer Occupations, round out the top 10 growing occupations.

Webster has a high concentration of manufacturing, but it's a declining sector and the occupations that are expected to shed jobs the most reflect this trend. Metal Workers and Plastic Workers (-35), Assemblers and Fabricators (-29), and Other Production occupations (-26) make up half of the six fastest-shrinking occupations.

Top 10 Increases and Decreases By Occupation for Webster, 2022 - 2027

| | SOC | Description | Webster | | | Rochester MSA | |
|-------------------------------|-------------------------------|-----------------------------------------------------------------------------------------------|-------------------------------------------------|-------|--------------------|----------------------|----------------------|
| | | | 2022 | 2027 | 2022 - 2027 Change | 2022 - 2027 Change % | 2022 - 2027 Change % |
| Top 10 Increasing Occupations | 35-3000 | Food and Beverage Serving Workers | 1,740 | 1,869 | 129 | 7.4% | 5.6% |
| | 31-1100 | Home Health and Personal Care Aides; and Nursing Assistants, Orderlies, and Psychiatric Aides | 967 | 1,060 | 93 | 9.6% | 7.7% |
| | 35-2000 | Cooks and Food Preparation Workers | 474 | 530 | 56 | 11.8% | 8.1% |
| | 29-1000 | Healthcare Diagnosing or Treating Practitioners | 434 | 474 | 40 | 9.2% | 7.0% |
| | 39-9000 | Other Personal Care and Service Workers | 378 | 411 | 33 | 8.7% | 4.3% |
| | 35-1000 | Supervisors of Food Preparation and Serving Workers | 298 | 328 | 31 | 10.3% | 7.3% |
| | 47-2000 | Construction Trades Workers | 793 | 822 | 29 | 3.6% | 5.4% |
| | 17-2000 | Engineers | 422 | 445 | 23 | 5.4% | 2.2% |
| | 15-1200 | Computer Occupations | 556 | 579 | 23 | 4.1% | 2.3% |
| | Top 10 Decreasing Occupations | 43-9000 | Other Office and Administrative Support Workers | 274 | 266 | (9) | -3.1% |
| 43-5000 | | Material Recording, Scheduling, Dispatching, and Distributing Workers | 293 | 281 | (12) | -4.1% | -0.9% |
| 51-5100 | | Printing Workers | 68 | 54 | (14) | -20.1% | -7.4% |
| 43-6000 | | Secretaries and Administrative Assistants | 373 | 353 | (20) | -5.3% | -4.1% |
| 43-3000 | | Financial Clerks | 339 | 313 | (26) | -7.6% | -4.6% |
| 51-9000 | | Other Production Occupations | 436 | 410 | (26) | -6.0% | -2.0% |
| 51-2000 | | Assemblers and Fabricators | 714 | 684 | (29) | -4.1% | -2.8% |
| 41-2000 | | Retail Sales Workers | 1,662 | 1,631 | (31) | -1.8% | -2.6% |
| 51-4000 | | Metal Workers and Plastic Workers | 302 | 267 | (35) | -11.5% | -1.4% |
| 13-2000 | | Financial Specialists | 338 | 297 | (41) | -12.1% | -0.3% |

Source: Lightcast



5. RESIDENTIAL MARKET ANALYSIS

Residential Market Opportunities

Leading up to 2022, the residential real estate market in the Rochester metro area has been showing the same signs of undersupply that are common across the US. Sales and pricing for single-family properties have been strong. The rental market has absorbed more multifamily units than at any time in recent history. The spring of last year brought first steady and then bounding, 75-basis-point jumps in the Federal Reserve prime rate. The target may be inflation, but an anticipated consequence has been to dampen the residential property market. While some predicted a complete reversal of high demand and high prices, that hasn't happened yet in Rochester or the Town of Webster. While sales volumes and multifamily net absorption have declined, the supply of housing has contracted in a way where prices are stable and still rising.

The market in the Town of Webster has traditionally been for single-family housing, but it has a growing demand for multifamily housing with proven recent developments that have capitalized on this change. Although its population is aging, it is also increasingly wealthy as reflected in higher household incomes and rising prices on rents and housing sales.

Overall, there are a variety of housing market opportunities for the BOA. There is a clear shortage of single-family housing, and this is the most proven market. However, recent absorption and vacancy for multifamily shows that rental housing at lower price points is viable as well. The first preference for senior residents is to age-in-place. Given the income profiles of older households in the area, downsizing is likely to be a choice of practicality instead of budget. However, preferences for senior housing options that provide community and lifestyle amenities in a condo or attached-unit setting could match the Webster BOA's combination of large footprint and proximity to parks, downtown retail, and nearby health services.

Key Findings

- **In the Town of Webster, the number of housing units increased by nearly 18%, from 16,496 to 19,432.** The rate of growth from 2011 to 2021 was not the same across housing types, with multifamily housing increasing 24% and townhouses, condos, and mobile homes increasing by 79%. Single-family housing grew at a slower rate than the other types, but it still makes up the largest number of units. Compared to population growth (6%), single-family housing grew at a rate of 9%.
- **Median values are higher than the surrounding area and growing at a similar rate.** The Town of Webster's median home value crossed above \$200,000 in 2021 to \$206,100. This is more than \$40,000 above the surrounding area and is showing no signs of slowing, with a five-year increase in value of 14.5%.
- **Webster has a younger housing stock and development in the last 30 years is double that of other areas.** Two out of five houses in Webster were constructed since 1990 (39%), which is in stark contrast to Monroe County (18%) and the Rochester MSA (20%).



- **A look at residential building permits shows more new stock in the pipeline.** After a slow 2020, residential building permits jumped up by almost 50 to hit 165 in 2021. This seems like a return to pre-pandemic building demand, when the area would have 200–300 permitted units per year.
- **The 12-month moving average for sales volume is still higher than at the beginning of 2019, indicating strong demand.** The Town of Webster market experienced a dip in sales volumes in the first half of 2020 due to the pandemic. Since then, sales have been steady and prices were trending higher through the end of 2022.
- **The Town of Webster has rapidly increased the size of its rental market, with units increasing at three times the rate of the Rochester MSA.** The growth in the rental market has impacted the vacancy rate for multifamily units, which has been steadily decreasing and now fluctuates between 2% and 4%. This implies significant pent-up demand for multifamily.
- **The Town of Webster has seen price increases for home sales at the same time as demand for apartments has been high, creating expensive rents and low vacancies.** Historical data shows that the Town of Webster has always been more expensive than the larger metro area, but starting in 2020 rental rates began to increase at a faster rate, creating a gap between Webster and the Rochester MSA.

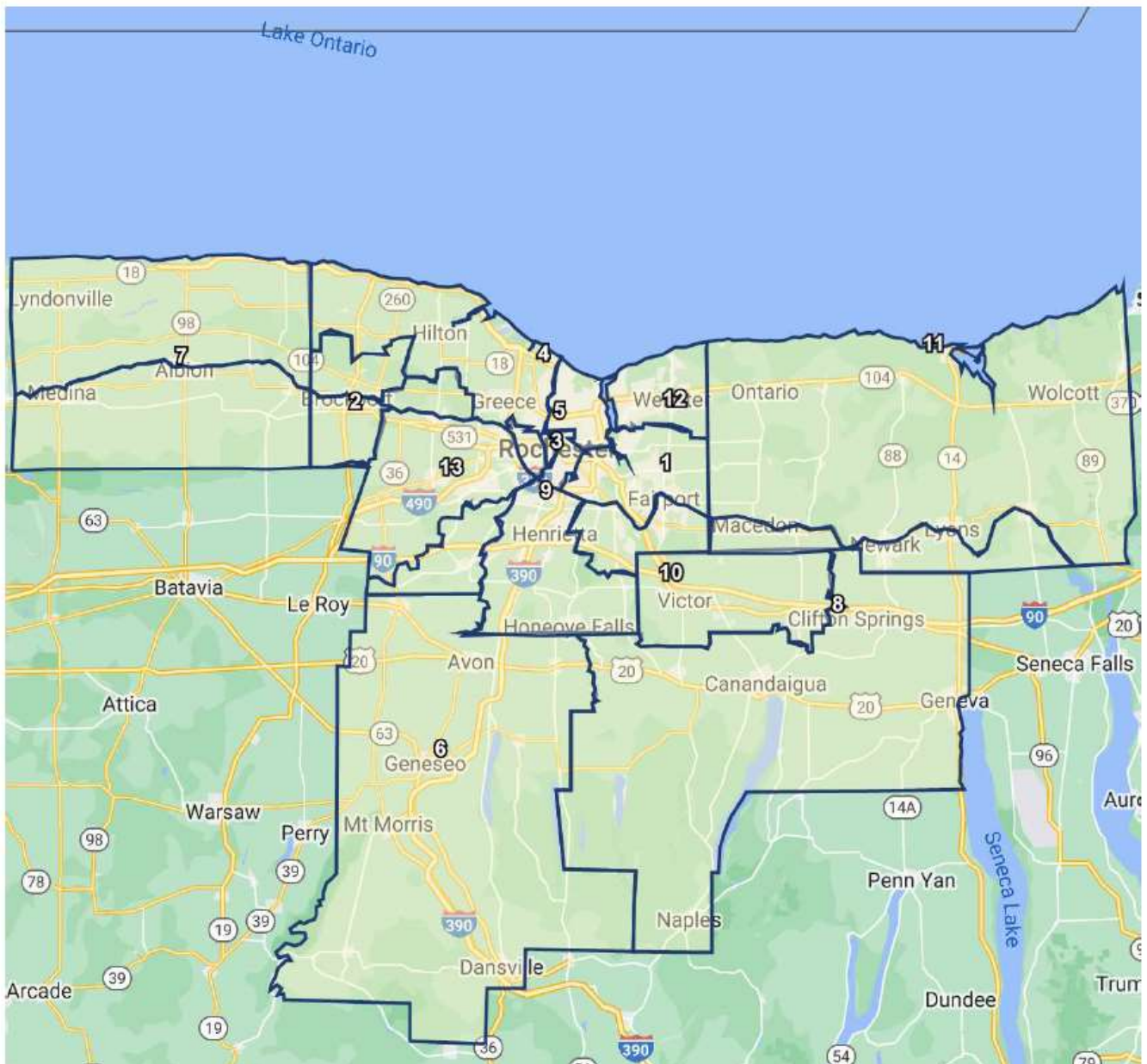


Market Area

Market data from Redfin and CoStar is for the Town of Webster and uses the Rochester MSA market (as defined by CoStar) as a comparative region. The map of this area is below and shows the Rochester MSA and thirteen submarkets.

Rochester MSA

ROCHESTER SUBMARKETS



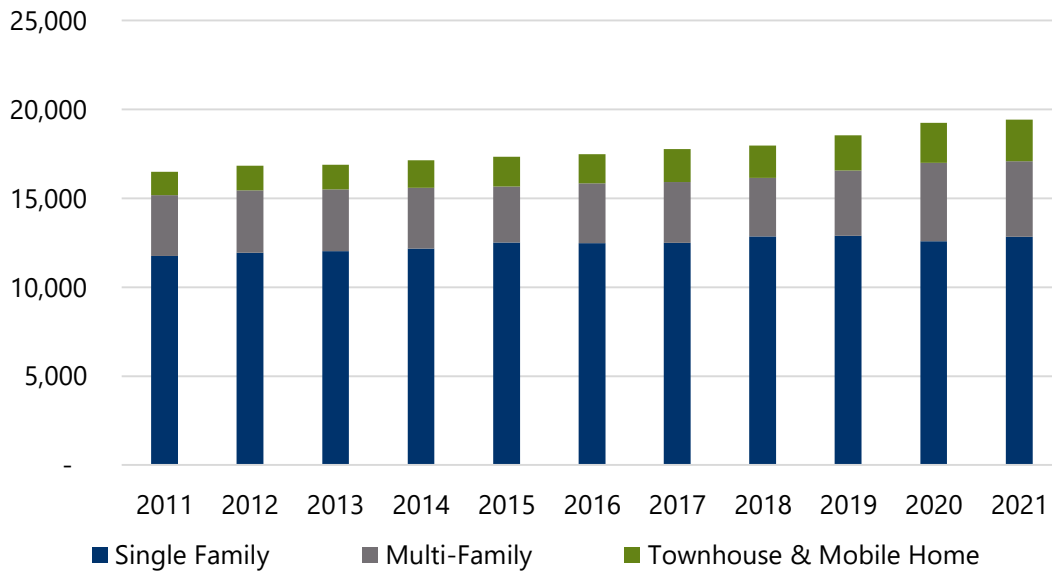
Housing Inventory Analysis

Housing Stock Trends

Between 2011 and 2021, the number of housing units in the Town of Webster increased by nearly 18%, from 16,496 to 19,432. The demographic analysis shows that population for the region increased by only 6% over a similar period (2010 to 2022).

The rate of increase was not the same across housing types. More dense types of housing units grew at a much faster rate than single-family housing. Multifamily housing increased 24% during this period, compared to only 9% for single-family housing. Townhouses, condos, and mobile homes increased by 79%, nearly doubling from 1,306 units to 2,338. Although single-family housing grew at a slower rate than the other types, it makes up the largest number of units. In 2021 single-family housing units, at 12,840, represented two out of every three units (of the total 19,432).

Units By Type of Structure, Town of Webster



Source: Census

Single-family housing grew at a fast enough rate to keep up with population growth (9% vs 6%). However, because of the changing composition of household types, the Town of Webster’s households increased at a faster rate (13%).



Home Values

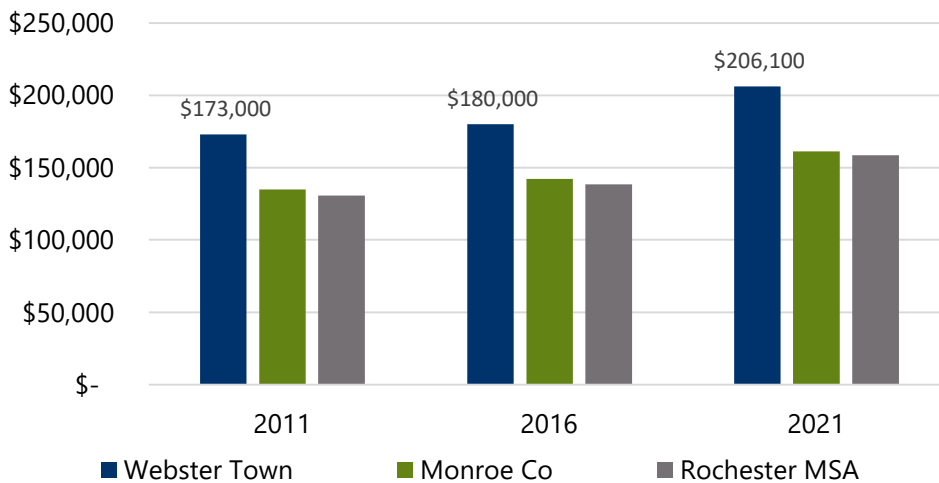
Changes in home values are a key indicator for the direction a residential market is heading. Town of Webster property values are significantly higher than the surrounding areas. Monroe County and the Rochester MSA have similar growth trends and have converged close to a median home value of \$160,000 over the last 10 years. The Town of Webster has had a similar growth trend since 2016, but started from median values that were 25%–50% (approximately \$40,000) higher.

Median Home Values

| Region | 2011 | 2016 | 2021 | 2011 - 2016, % Change | 2016 - 2021, % Change |
|---------------|------------|------------|------------|--------------------------|--------------------------|
| Webster Town | \$ 173,000 | \$ 180,000 | \$ 206,100 | 4.0% | 14.5% |
| Monroe County | \$ 135,100 | \$ 142,200 | \$ 161,300 | 5.3% | 13.4% |
| Rochester MSA | \$ 130,800 | \$ 138,500 | \$ 158,700 | 5.9% | 14.6% |

Source: Census

Median Home Values



Source: Census

Housing Units By Home Value, Town of Webster

| Range of Value | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|------------------------|------|------|------|------|------|------|------|------|------|------|------|
| Less than \$100,000 | 8% | 8% | 8% | 9% | 8% | 7% | 7% | 6% | 5% | 5% | 3% |
| \$100,000 to \$124,999 | 13% | 14% | 13% | 11% | 11% | 11% | 10% | 9% | 9% | 9% | 7% |
| \$125,000 to \$149,999 | 15% | 14% | 15% | 14% | 14% | 14% | 13% | 12% | 11% | 12% | 11% |
| \$150,000 to \$174,999 | 18% | 17% | 17% | 16% | 16% | 17% | 17% | 16% | 16% | 13% | 14% |
| \$175,000 to \$199,999 | 13% | 13% | 12% | 14% | 14% | 15% | 16% | 16% | 14% | 16% | 15% |
| \$200,000 to \$249,999 | 15% | 14% | 14% | 16% | 17% | 17% | 18% | 19% | 20% | 18% | 19% |
| \$250,000 to \$299,999 | 9% | 10% | 11% | 10% | 9% | 9% | 9% | 9% | 11% | 12% | 13% |
| \$300,000 to \$399,999 | 7% | 7% | 7% | 6% | 6% | 6% | 6% | 7% | 8% | 10% | 11% |
| \$400,000 to \$499,999 | 2% | 2% | 1% | 2% | 1% | 1% | 2% | 2% | 3% | 2% | 4% |
| Greater than \$499,999 | 2% | 2% | 2% | 2% | 2% | 2% | 2% | 3% | 3% | 3% | 3% |

Source: Census



Age of Housing Stock

Part of the explanation for the Town of Webster's higher valuations is related to its younger housing stock. Nearly 40% of its housing structures have been built since 1990. In both Monroe County and the Rochester MSA this newer housing represents about 20%, or half the share of the housing stock as in Webster. Both of the larger regions also have a significant share of housing from the pre-World War II era. Over a quarter of the housing structures from these regions were built before 1940. These structures often have older water and electrical utilities and have substantial maintenance costs compared with more recent structures.

Housing Units By Year Structure Was Built

| Period Built | Webster Town | Monroe County | Rochester MSA |
|-----------------|-----------------|------------------|------------------|
| 1939 or earlier | 8% | 25% | 27% |
| 1940 to 1949 | 3% | 6% | 5% |
| 1950 to 1959 | 11% | 13% | 11% |
| 1960 to 1969 | 10% | 14% | 12% |
| 1970 to 1979 | 15% | 13% | 13% |
| 1980 to 1989 | 13% | 11% | 11% |
| 1990 to 1999 | 16% | 8% | 9% |
| 2000 to 2009 | 14% | 6% | 7% |
| 2010 to 2019 | 9% | 4% | 4% |
| 2020 or later | 0% | 0% | 0% |

Source: Census

Recent Developments

Bella Terrace Place is a recent development enabled by rezoned industrial land that added 67 townhouses and 100 single-family homes to the Town of Webster's residential market. The townhouses are marketed as an option for off-campus living for students and young professionals, and the homes offer a low entry point for first-time home buyers.



Occupancy by Tenure

The Town of Webster and the nearby areas have continued to add residential inventory in response to demand. However, occupancy data from the US Census Bureau shows that the market continues to tighten, and there are indications that home ownership is becoming less attainable as prices rise.

The Town of Webster’s occupancy rate has increased over each of the last five-year survey periods since 2011. Occupancy above 95% represents a housing market with very little unused housing stock, which can make it difficult for households to find an affordable place to live.

Housing Occupancy By Year

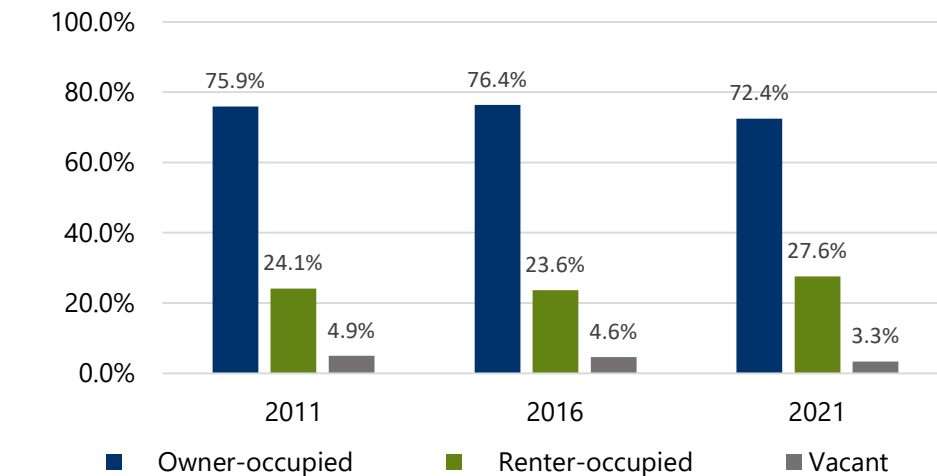
| Description | Webster Town | Monroe Co | Rochester MSA |
|----------------------|--------------|-----------|---------------|
| Housing units, 2021 | 20,076 | 334,821 | 487,610 |
| Occupied units, 2021 | 19,432 | 311,955 | 445,082 |

| Occupancy Rates | | | |
|-----------------|-----|-----|-----|
| 2021 | 97% | 93% | 91% |
| 2016 | 96% | 93% | 91% |
| 2011 | 95% | 92% | 91% |

Source: Census

The composition of tenure for Town of Webster households reinforces this view of a residential market in high demand. Vacancy has decreased from 4.9% in 2011 to 3.3% in 2021. The balance of owner-occupied versus renter-occupied households shifted over the same period, with over a quarter of households renting in 2021.

Housing Tenure By Type, Webster Town



Source: Census



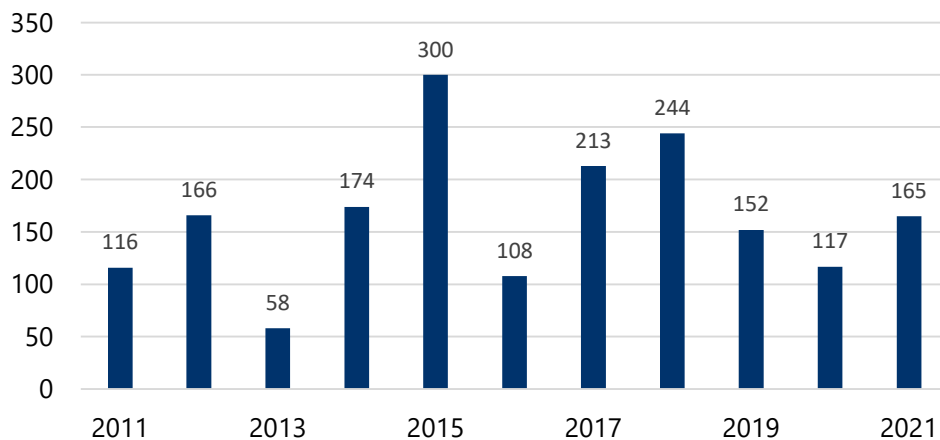
Housing Market Trends

Development Activity (Building Permits)

An advanced metric for residential housing market health is how much new housing construction is in the pipeline to be built. Building permits are not guarantees of future housing supply, but they are a good indicator of how builders see the prospects for a market.

For the Town of Webster, the peak of permitting volume coincides with a strong residential market before the pandemic. Annual residential permits peaked at 300 in 2015, but then enjoyed other strong periods with permits above 200 per year in 2017 and 2018. It's likely that complications from doing business during lockdowns as well as shortages of municipal staff may have affected permitting during 2020, as permits dipped to 117 that year. While not reaching the same heights as pre-COVID, 2021 was a rebound year with 165 permits, which is the highest level of builder confidence since 2018.

Residential Building Permits, Webster Town



Source: SOCDS Building Permits Data

Compared to the rest of Monroe County and the Rochester MSA, the Town of Webster's permitting trends are almost exactly reversed. For the nine-year period before the pandemic the Town of Webster was averaging 75 single-family permits per year. When individuals were suddenly spending more time quarantining in their homes, demand for housing increased. The two years during the pandemic saw single-family housing permits in Webster nearly double to 141 permits per year. At the same time the Town of Webster saw a decline in permits for multifamily housing.

Monroe County and the Rochester MSA saw opposite trends for each part of the housing market. Monroe County saw nearly 100 fewer (-96) single-family permits during the pandemic compared with 2011 to 2019. The decline in single-family housing for Rochester wasn't as significant, but the MSA didn't see any kind of increase like the Town of Webster. Both of the larger geographic areas did see a significant jump in multifamily housing permits. Monroe County saw increases in multifamily housing permits of 225 per year or 45%. The Rochester MSA saw increases of 153 permits per year or 22%.



Average Annual Housing Permits By Type

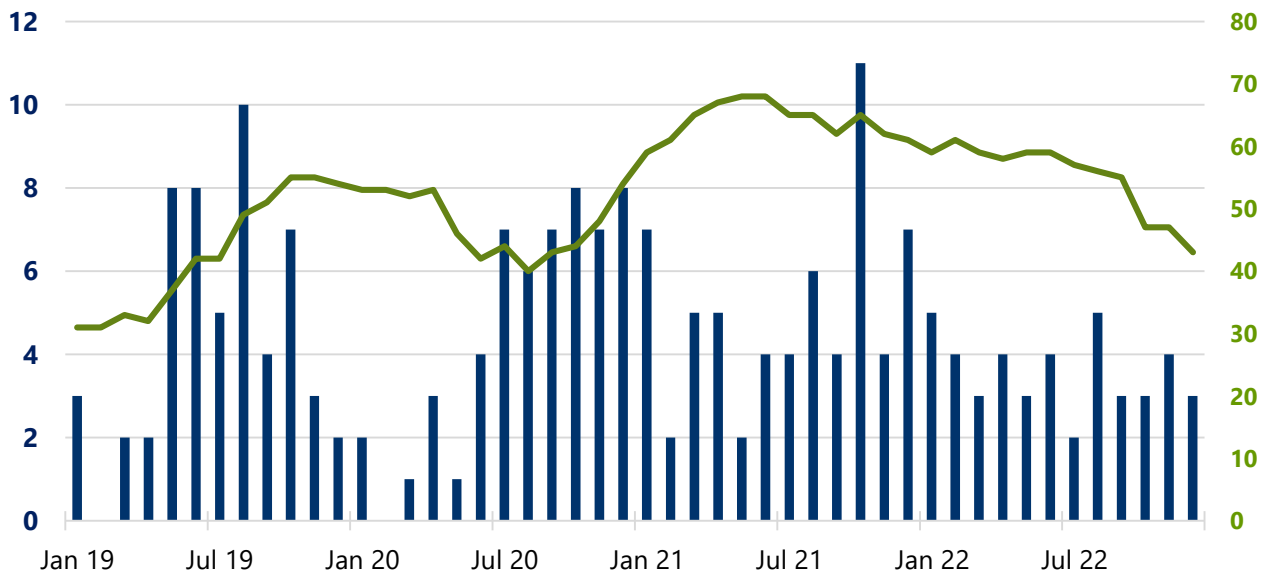
| Description | Town of Webster | Monroe County | Rochester MSA |
|----------------------|-----------------|---------------|---------------|
| Single Family | | | |
| 2011 - 2019 | 75 | 723 | 1,206 |
| 2020 - 2021 | 141 | 627 | 1,165 |
| Multi Family | | | |
| 2011 - 2019 | 95 | 504 | 690 |
| 2020 - 2021 | 64 | 730 | 844 |

Source: SOCDs

Home Sales

Redfin is a nationwide residential real estate brokerage company that offers historical sales data for markets across the US. The chart below looks at the last four years of sales in the Town of Webster. The **blue** bars represent monthly home sales volume in the region. The **green** line is the previous 12-month total sales (so the January 2019 line value includes sales from February 2018 through January 2019). The moving total helps look at trends in sales volumes without the impacts of seasonal variation (since residential markets are typically higher volume during warmer months).

Property Sales, Webster Town Sales Volume & 12-Month Moving Average



Source: Redfin

The pandemic created a dip in the first half of 2020. Outside of this slow period, the Town of Webster’s market shows fluctuation in monthly sales volumes with a peak of eleven sales in October 2021. The Federal Reserve began to increase interest rates in March 2022. Since that point sales volumes have been steady but trending lower. Home

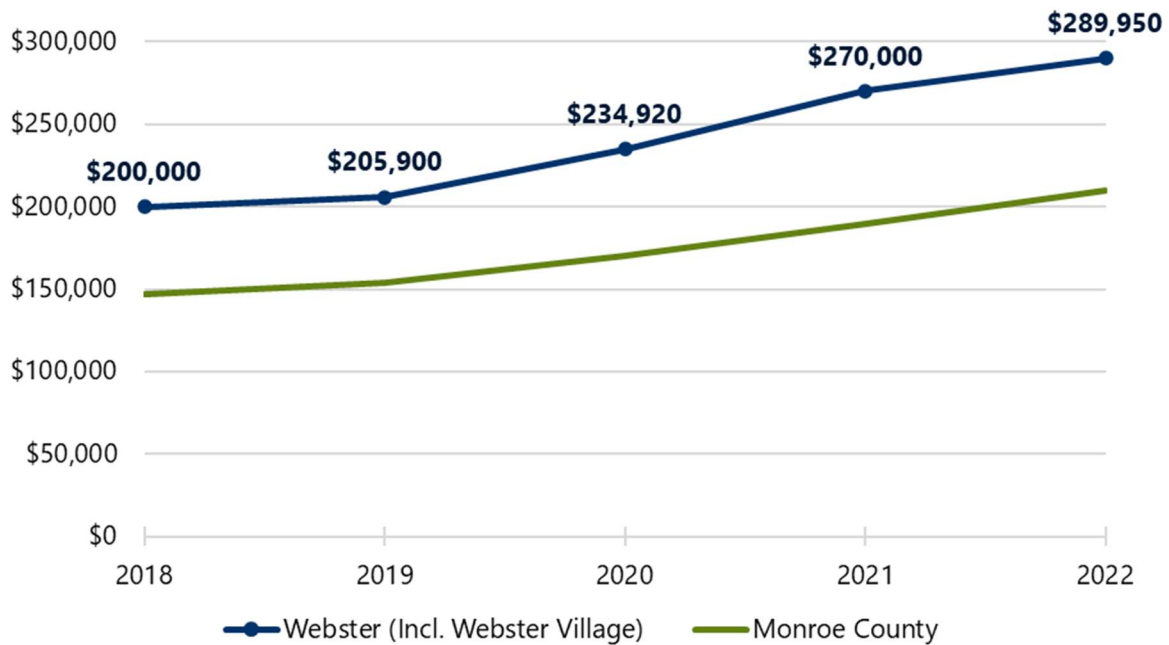


sales remained in the range of two to five per month throughout the rest of 2022, and the 12-month moving total at the end of 2022 was still higher than at the beginning of 2019, indicating a strong floor for demand in the face of increased borrowing costs.

Home Prices

In addition to stalwart sales volumes, the trends for pricing relate to a residential market with significant pent-up demand. In 2018 the median home price in the Town of Webster stood at \$200,000. In 2022, the median home price had increased 45% to nearly \$290,000. The growth in local housing prices has been generally on par with Monroe County as a whole. As of March 2023, the median home price in Webster is already up another 9.4% to \$317,250.

Home Price Trends (2018-2022)



Source: Greater Rochester Association of Realtors

A detailed comparison of the Town of Webster’s home price growth to that in Monroe County and its municipalities is shown below. Overall, despite lower sales volumes and the price drag caused by higher interest rates, home prices in Webster continue to rise. There is ample demand from buyers who are frustrated by low inventory. The sales that do occur feature multiple offers and often cash offers, or at least bank-enabled cash offers (an evolution in lending that allows levered borrowers to give full cash at the time of sale). Data from Redfin also indicates that the typical time on the market for homes is only 10 days as of March 2023. The continued strong sales prices even in the face of adequate unit growth, moderating sales volumes, and higher borrowing costs means that the residential market in the Town of Webster is robust.



Monroe County Home Price Trends (2018-2022)

| | 2018 | 2019 | 2020 | 2021 | 2022 | Change From 2021 | Change From 2018 |
|----------------------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| Webster (Incl. Webster Village) | \$200,000 | \$205,900 | \$234,920 | \$270,000 | \$289,950 | +7.4% | +45.0% |
| Monroe County | \$146,855 | \$154,000 | \$170,000 | \$190,000 | \$210,000 | +10.5% | +43.0% |
| Chili | \$147,000 | \$154,000 | \$172,000 | \$190,000 | \$225,000 | +18.4% | +53.1% |
| Clarkson | \$150,000 | \$162,500 | \$170,000 | \$209,950 | \$233,250 | +11.1% | +55.5% |
| Gates | \$119,000 | \$126,050 | \$145,000 | \$160,000 | \$179,250 | +12.0% | +50.6% |
| Greece | \$133,000 | \$142,000 | \$155,000 | \$175,000 | \$192,000 | +9.7% | +44.4% |
| Hamlin | \$120,000 | \$128,000 | \$149,500 | \$166,000 | \$180,500 | +8.7% | +50.4% |
| Ogden (Spencerport Village) | \$163,750 | \$183,500 | \$197,000 | \$210,000 | \$230,000 | +9.5% | +40.5% |
| Parma (Hilton Village) | \$164,950 | \$162,500 | \$200,000 | \$207,250 | \$247,450 | +19.4% | +50.0% |
| Riga (Churchville Village) | \$134,000 | \$174,900 | \$190,000 | \$205,000 | \$194,750 | -5.0% | +45.3% |
| Sweden (Brockport Village) | \$130,000 | \$142,000 | \$150,000 | \$172,000 | \$195,000 | +13.4% | +50.0% |
| Wheatland (Mumford Village, | \$132,950 | \$143,750 | \$164,900 | \$175,000 | \$155,000 | -11.4% | +16.6% |
| Brighton (West Brighton) | \$195,000 | \$195,000 | \$227,000 | \$250,000 | \$275,000 | +10.0% | +41.0% |
| East Rochester | \$104,450 | \$104,500 | \$117,000 | \$141,250 | \$160,000 | +13.3% | +53.2% |
| Henrietta (West Henrietta) | \$155,000 | \$168,201 | \$182,000 | \$211,513 | \$232,500 | +9.9% | +50.0% |
| Irondequoit (East and West) | \$129,900 | \$132,000 | \$150,000 | \$168,000 | \$186,000 | +10.7% | +43.2% |
| Mendon (Honeoye Falls Village) | \$263,500 | \$275,000 | \$302,040 | \$350,000 | \$400,000 | +14.3% | +51.8% |
| Penfield | \$217,800 | \$240,000 | \$242,500 | \$282,000 | \$320,000 | +13.5% | +46.9% |
| Perinton (Fairport Village) | \$217,700 | \$220,000 | \$240,000 | \$280,500 | \$307,750 | +9.7% | +41.4% |
| Pittsford (Pittsford Village) | \$291,000 | \$300,000 | \$346,000 | \$405,000 | \$420,000 | +3.7% | +44.3% |
| Rush | \$208,250 | \$240,000 | \$250,000 | \$266,988 | \$284,000 | +6.4% | +36.4% |
| City of Rochester | \$85,278 | \$95,000 | \$112,500 | \$130,000 | \$135,000 | +3.8% | +58.3% |

Source: Greater Rochester Association of Realtors

Sales Activity and Inventory

While the number of sales in Webster dropped in 2022 from 2021, the Town's housing market remained very strong and one of the most active in Monroe County. Notably, the Town has had one of the more active condo markets, with approximately 80 condo sales in 2020.

In 2022, the inventory of homes stood at 0.9 month, indicating very low inventory and far below a typical healthy range of 5 to 6 months of inventory. Inventory has remained tight into 2023, with rising interest rates causing many would-be sellers to remain in their homes. As a result, housing demand has continued to build up and market conditions are favorable for new housing development despite the higher interest rate environment. A detailed comparison of the Town to the County and other municipalities is provided in the table below.



Monroe County Housing Market Overview (2022)

| | Total Closed Sales | Change from 2021 | Percent Single Family | Percent Condo | Months Supply of Inventory | List to Close (Days) | Pct. of Orig. Price Received |
|-------------------------------|--------------------|------------------|-----------------------|---------------|----------------------------|----------------------|------------------------------|
| Webster (Incl. Webster | 486 | -15.8% | 84.0% | 16.0% | 0.9 | 71 | 112.2% |
| Monroe County | 7,838 | -11.9% | 91.4% | 8.6% | 0.6 | 68 | 111.7% |
| Chili | 315 | -14.2% | 93.0% | 7.0% | 0.6 | 61 | 113.5% |
| Clarkson | 58 | -17.1% | 100.0% | 0.0% | 0.7 | 71 | 109.5% |
| Gates | 345 | -24.2% | 89.0% | 11.0% | 0.4 | 63 | 113.6% |
| Greece | 1,262 | -12.2% | 94.5% | 5.5% | 0.3 | 64 | 112.7% |
| Hamlin | 58 | -21.6% | 100.0% | 0.0% | 0.4 | 71 | 109.5% |
| Ogden (Spencerport Village) | 196 | -10.9% | 92.3% | 7.7% | 0.3 | 71 | 111.8% |
| Parma (Hilton Village) | 168 | -12.5% | 95.2% | 4.8% | 1.3 | 77 | 107.1% |
| Riga (Churchville Village) | 43 | -24.6% | 60.5% | 39.5% | 0.7 | 62 | 109.0% |
| Sweden (Brockport Village) | 108 | -25.0% | 84.3% | 15.7% | 0.6 | 73 | 105.1% |
| Wheatland (Mumford Village, | 49 | -15.5% | 100.0% | 0.0% | 0.9 | 100 | 104.8% |
| Brighton (West Brighton) | 407 | +0.2% | 86.7% | 13.3% | 0.2 | 60 | 113.9% |
| East Rochester | 77 | -19.8% | 81.8% | 18.2% | 0.0 | 62 | 115.0% |
| Henrietta (West Henrietta) | 415 | -12.4% | 88.4% | 11.6% | 0.4 | 64 | 114.2% |
| Irondequoit (East and West) | 743 | -16.0% | 97.3% | 2.7% | 0.3 | 61 | 115.3% |
| Mendon (Honeoye Falls | 91 | -25.4% | 93.4% | 6.6% | 1.5 | 72 | 108.3% |
| Penfield | 415 | -19.7% | 84.6% | 15.4% | 0.5 | 66 | 111.4% |
| Perinton (Fairport Village) | 552 | -11.1% | 82.2% | 17.8% | 0.2 | 62 | 112.3% |
| Pittsford (Pittsford Village) | 370 | -20.3% | 88.6% | 11.4% | 0.9 | 74 | 107.2% |
| Rush | 24 | -29.4% | 100.0% | 0.0% | 0.4 | 72 | 110.7% |
| City of Rochester | 1,656 | +1.5% | 96.1% | 3.9% | 1.1 | 77 | 109.4% |

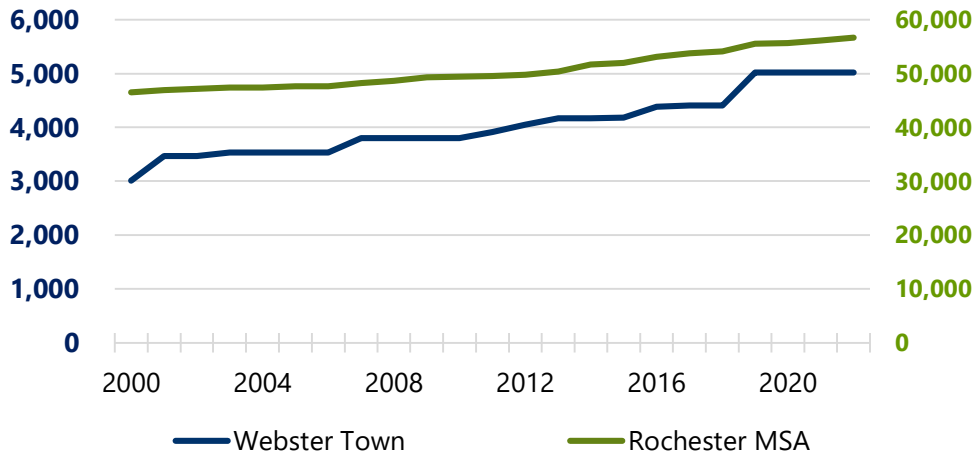
Source: Greater Rochester Association of Realtors

Multifamily Market

Reinforcing the earlier evidence from the Census survey, CoStar data for multifamily housing units indicates that the Town of Webster has rapidly increased the size of its rental market in recent years. By way of comparison, the Rochester MSA is a mature multifamily rental market. During the period since 2001, the Rochester MSA has seen units increase 22% from 46,500 to nearly 57,000, for a compound annual growth rate of just under 1%. However, in the Town of Webster the number of units has increased at three times the rate. From 3,463 units in 2001 up to 5,018 units in 2022, or a +67% change for a compound annual growth rate of 2.4%.



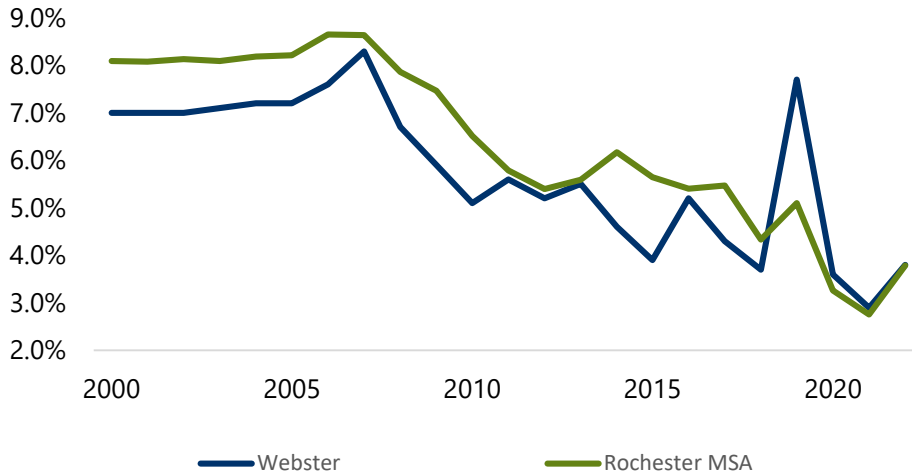
Multifamily Units, Webster Town & Rochester MSA



Source: CoStar

Despite aggressive building in the region, vacancy rates for multifamily units continue to decline. The Town of Webster added over 2,000 multifamily units over a couple decades. Instead of alleviating the tight rental market, conditions became even tighter over the period. The vacancy rate in the 2000s was firmly above 6% and even crested in 2007 at 8.3%. However, since then the rate has seen almost continuous decreases and now sits between 2% and 4%. The metro area market has typically had slightly higher vacancies than the Town of Webster, but this gap is narrowing as both markets become in more demand.

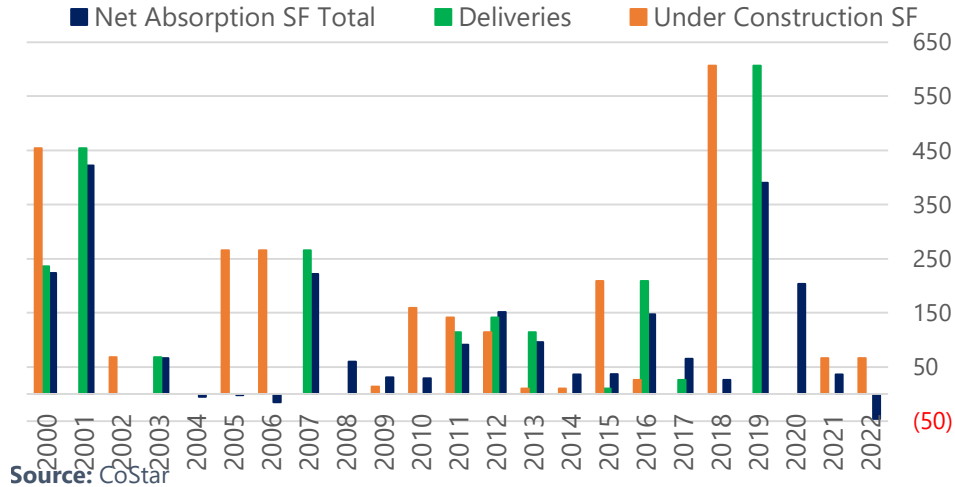
Multifamily Vacancy Rate



Source: CoStar



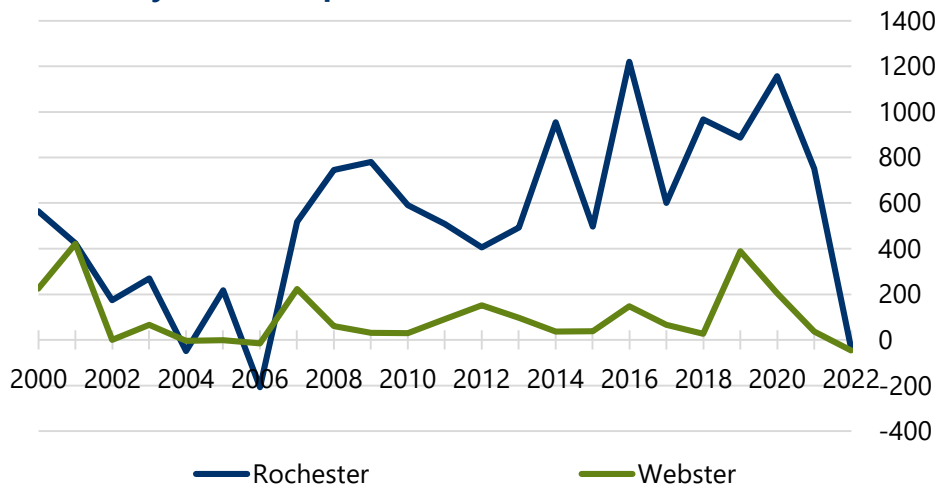
Multifamily Market Metrics, Webster



Sometimes prices for homes are counter-cyclical with rent levels so that people seeking housing have at least one lower-cost option for finding a home. However, the market in the Town of Webster has seen price increases for home sales at the same time as demand for apartments has also been high, creating expensive rents and low vacancy rates. This creates pressure on both housing markets simultaneously.

The larger regional market does not offer a respite from growing pressure on multifamily housing. It has undergone the same trend of rapid net absorption over the last five years. This trend, however, paused suddenly in 2022 for both the Webster and Rochester markets, possibly in response to increased interest rates.

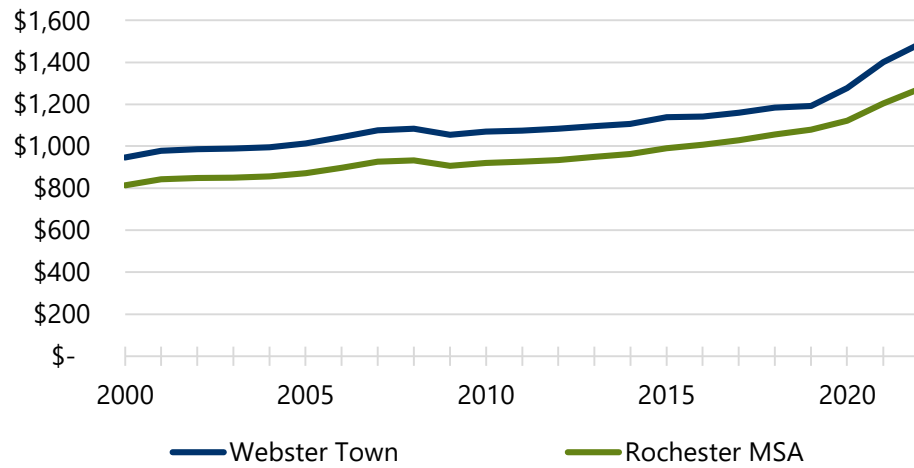
Multi-Family, Net Absorption



Looking at CoStar data for Asking Rents, the Town of Webster has always been more expensive than the larger metro area, though the difference has been fairly consistent. The two markets have seen prices creep up over time, with a brief respite during the 2009 recession. However, starting in 2020 rental rates for the Town of Webster have increased at a faster rate. This is causing a widening gap between the two regions as not only are Webster's rentals more expensive, but now the rental price point is growing at a faster rate than in the Rochester MSA.



Asking Rent, Webster Town and Rochester MSA



Source: Costar

Interview Findings

- **There has been a shortage of homes for sale in Webster and the surrounding areas.** This shortage has led to a competitive market with multiple offers on properties. These multiple offers have consistently resulted in homes selling for above list price.
- **The increasing prices make it more challenging for existing residents to remain.** Price increases create barriers for lower-income households to buy or rent in the area.
- **The number of days a home stays on the market has continued to increase.** Even with the increase in days on market, homes are still selling faster than pre-pandemic.



Housing Demand and Market Potential

Population growth and changes in age and income are major drivers of housing demand. Changes in the composition of these characteristics over time can have a significant impact on the types and amounts of housing demanded in a region.

Older and higher-income households saw the largest increases since 2016 in the Town of Webster. The two cohorts that saw the most growth between 2016 and 2021 are households making between \$100,000 and \$200,000 that are either retired or nearing retirement. These groups added 1,320 households in the last five years. Households at almost every income level under the age of 25 declined for a net decrease of 247 households.

Household Change By Age and Income, Webster Town 2016 - 2021

| Income Range | under 25 years | 25 to 44 years | 45 to 64 years | 65 years and over | Total |
|------------------------|-------------------|-------------------|-------------------|----------------------|--------------|
| Less than \$35,000 | -94 | -259 | -407 | -7 | -767 |
| \$35,000 to \$44,999 | -51 | +194 | +197 | +142 | +482 |
| \$45,000 to \$59,999 | -87 | +61 | -259 | +62 | -223 |
| \$60,000 to \$99,999 | -35 | +236 | -361 | +200 | +40 |
| \$100,000 to \$199,999 | +20 | +397 | +614 | +706 | +1737 |
| \$200,000 or more | 0 | +250 | +456 | -23 | +683 |
| Total | -247 | +879 | +240 | +1080 | +1952 |

Source: Census

Market Demand Potential

Based on commuting and migration patterns, it is expected that new housing development in the BOA could draw tenants or homebuyers from around the greater Rochester region. Therefore, the housing demand analysis considers the housing demand within the Rochester MSA that the Town of Webster and the BOA would be expected to be able to "capture" over the next five years.

As shown in the following table, demand generated by household growth and turnover (households living in the region that move within the region) is expected to total nearly 13,000 housing units annually. This represents the entire "demand pool" from which the BOA would be able to capture a portion for new housing development. Based on the market analysis and past capture of regional housing demand, it is expected the Town of Webster could capture or "absorb" between 255 and 382 units annually, representing an estimated 1,593 units of housing development potential over the next five years (including both market rate and affordable housing). The BOA is expected to be able to capture a significant share of the Townwide market potential – an estimated 1,035 units over five years.



Webster Housing Market Potential (Units)

| Bracket | Current Households | Annual Turnover Demand | Annual Household Growth | Total Annual Demand |
|-----------------------------------------------------------------------------|--------------------|------------------------|-------------------------|---------------------|
| <\$15,000 | 41,441 | 1,243 | -1,387 | (144) |
| \$15,000-\$24,999 | 36,774 | 1,103 | -1,592 | (489) |
| \$25,000-\$34,999 | 37,769 | 1,133 | -1,323 | (190) |
| \$35,000-\$49,999 | 50,654 | 1,520 | -1,360 | 160 |
| \$50,000-\$74,999 | 79,103 | 2,373 | -946 | 1,427 |
| \$75,000-\$99,999 | 60,349 | 1,810 | 95 | 1,905 |
| \$100,000-\$149,999 | 76,388 | 2,292 | 2,090 | 4,382 |
| \$150,000-\$199,999 | 35,505 | 1,065 | 2,441 | 3,506 |
| \$200,000+ | 32,232 | 967 | 1,980 | 2,947 |
| Total | | | | 12,740 |
| Annual Webster Capture Potential (Low) | | | | 255 |
| Annual Webster Capture Potential (High) | | | | 382 |
| Estimated 5-Year Webster Market Potential (Market Rate + Affordable) | | | | 1,593 |
| Estimated 5-Year BOA Market Potential (Market Rate + Affordable) | | | | 1,035 |

The housing market potential for the BOA is further detailed in the following tables by owner versus rental demand and rent/purchase price range (including affordable versus market rate housing). **Overall, there is market potential for 466 rental units and 569 homeowner units, of which there is potential for 251 market rate rental units and 482 market rate homeowner units over the next five years.**

Summary: Webster BOA 5-Year Housing Market Potential

| Housing Type | Rental Units | Homeowner Units | Total Units |
|--------------|--------------|-----------------|--------------|
| Affordable | 215 | 87 | 302 |
| Market Rate | 251 | 482 | 733 |
| Total | 466 | 569 | 1,035 |



Webster BOA 5-Year Housing Market Potential: Rental Units

| Income Bracket | Target Rent Level | Units |
|-----------------------------------|--------------------------|--------------|
| <\$15,000 | Less than \$375 | 96 |
| \$15,000-\$24,999 | \$375-\$500 | 64 |
| \$25,000-\$34,999 | \$500-\$625 | 55 |
| \$35,000-\$49,999 | \$875-\$1,250 | 81 |
| \$50,000-\$74,999 | \$1,250-\$1,875 | 86 |
| \$75,000-\$99,999 | \$1,875-\$25,000 | 39 |
| \$100,000-\$149,999 | \$2,500-\$3,750 | 31 |
| \$150,000-\$199,999 | 3750-\$5,000 | 9 |
| \$200,000+ | \$5,000+ | 5 |
| Total | | 466 |
| Total Market Rate | | 251 |
| Total Affordable/Workforce | | 215 |

Webster BOA 5-Year Housing Market Potential: Homeowner Units

| Income Bracket | Target Price Level | Units |
|-----------------------------------|---------------------------|--------------|
| <\$15,000 | Less than \$53,500 | (1) |
| \$15,000-\$24,999 | \$53,500 - \$89,000 | 21 |
| \$25,000-\$34,999 | \$89,000 - \$125,000 | 32 |
| \$35,000-\$49,999 | \$125,000 - \$179,000 | 35 |
| \$50,000-\$74,999 | \$179,000 - \$268,000 | 96 |
| \$75,000-\$99,999 | \$268,000 - \$357,000 | 100 |
| \$100,000-\$149,999 | \$357,000 - \$536,000 | 145 |
| \$150,000-\$199,999 | \$536,000 - \$715,000 | 72 |
| \$200,000+ | \$715,000+ | 69 |
| Total | | 569 |
| Total Market Rate | | 482 |
| Total Affordable/Workforce | | 87 |



6. RETAIL MARKET ANALYSIS

Retail Market Opportunities

The retail market is mature in the Rochester metro area, with well-positioned locations expanded over time and regional shopping centers established at regular intervals in most directions from the Webster BOA site. Webster's largest established retail node is just southwest of the BOA, with retail offerings including Target, DICK's TJ Maxx, Wegmans, Kohl's, Lowe's, and a variety of other big box and chain stores. Just south of the BOA is the Webster village center, which offers a range of locally owned restaurants and shops. There is a smaller retail area on the west side of town along Empire Boulevard, anchored by Walmart and a second Wegmans.

On the whole, retail offerings largely align with the spending patterns among trade area residents. A retail leakage analysis shows some retail development focused on eating and drinking or clothing shopping are most likely to be supportable in the Town of Webster and the towns to the east. The area is also underserved for a gas station and convenience store. With direct highway access via Route 104 and proximity to existing shopping centers and the Village center, the BOA has several advantages for supporting retail space.

Key Findings

- **The Webster BOA trade area expects slow population growth but an increasingly wealthy clientele for retailers.** The expected change in population for the Webster BOA trade area (5-minute drive area) from 2022 to 2027 is small (+86 people). However, the compositional changes in demographics mean that the area will reach an increasingly wealthy set of consumers. Each household income bracket over \$75,000 is expected to grow over this period.
- **Retail inventory grew quickly during the 2010s and is starting to add space again after a pause during the pandemic.** Since 2007 the Town of Webster has seen the addition of 11 buildings and nearly half a million square feet of new retail space. Since 2007 the area has averaged an increase of 30,000 square feet of retail per year. During the pandemic delivery of new space slowed, but 2022 saw another building adding 6,000 square feet.
- **The rate of vacant retail space is on the rise.** The vacancy rate for retail in the Town of Webster hit 6.7% in 2021, which is the highest vacancy going back to 2007. It regressed slightly to 6.5% in 2022. Where retail vacancy in the Town of Webster used to run two to three percentage points below the metro area, now the Rochester MSA has the lower vacancy rate by 1.7 percentage points (but it has also been trending up in recent years).
- **Leasing prices for retail space are volatile, especially compared to the metro area.** The price per square foot of retail in the Town of Webster crossed above \$17.00 again in 2022; the previous time was in 2020. And rates in both the town and the Rochester MSA are up. However, prices have not been stable, with even pre-pandemic dips such as down to \$11.53 per square foot in 2018.
- **After a busy 2010s, the 2020s have seen low levels of deliveries and often negative net absorption.** The recent history of retail deliveries has seen the Town of Webster average over 40,000 square feet per year, going back to 2007. However, the three-year average, which starts around the same time that the



pandemic started, is only a tenth of that (3,700 sf/year). The market's net absorption was able to keep up with substantial new deliveries in the middle of the last decade. However, three of the last four years have seen negative annual net absorption.

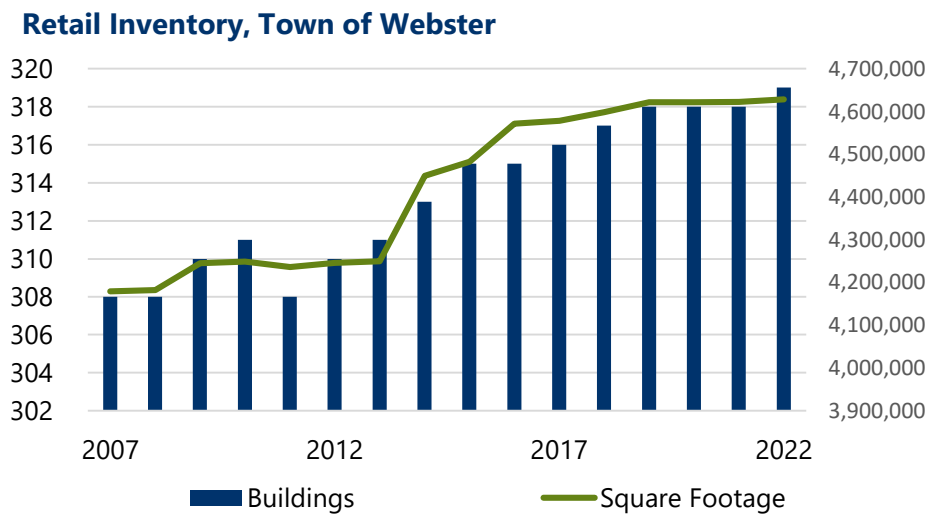
- **Food and Leisure are the top categories for spending in the trade area.** After accounting for domestic basics like shelter, health services, and groceries, there are a handful of consumer spending categories that rise to the top of the list with more than 5% of total household spending each year. (1) Restaurants, (2) entertainment and recreation, and (3) travel are the key discretionary spending categories and combined households on average spend \$11,616 per year or about 18.5% of all household consumer spending.
- **Retail gap analysis reveals a number of promising areas related to restaurants, clothing stores, fuel and convenience stores, and nail salons for business expansion.** These areas have a combination of undersupplied retail demand relative to sales as well as an average business size (by sales) that indicates an expansion or new location would be viable.



Inventory

Retail space in the Town of Webster in 2007 consisted of 308 buildings and 4.6 million square feet of leasable space. There is a single year's pause during the recession of the late 2000s and early 2010s when the retail market didn't add inventory. Otherwise, additions of buildings and space to the market have been steady and positive. Inventory reached 318 buildings and just over 4.6 million square feet by 2019. Activity paused during the COVID-19 pandemic, but in 2022 another building added 6,000 square feet of inventory, bringing the market total to just over 4.6 million square feet.

The retail market during this period added nearly 30,000 square feet per year in 11 buildings. This is an increase of 10.7% for the Town of Webster's retail square footage from 2007 to 2022, while the Rochester MSA increased inventory at a rate of 5.5%.



Retail Vacancy

While buildings and existing available square footage have gone up in the Town of Webster the vacancy rate has fluctuated between 1.7% in 2007 and 6.5% in 2022. The trend for vacancy was tightening in the decade before the pandemic. Vacancy rates above 5% shortly after the 2009 recession declined to below 3% in 2017. Even before COVID-19 emerged, the vacancy rate for retail was beginning to tick back up in 2018 and 2019. This coincided with continuous additions to inventory in the area. This may indicate that supply has been gradually outpacing demand for retail space in the Town of Webster. Vacancies have gone up again each of the last three years and settled above the previous peaks in the early 2010s. The Rochester MSA market follows a very similar but more gradual trend in vacancy.

Retail Vacancy Rates

| Period | Retail Vacancy Rates | |
|--------|----------------------|---------------|
| | Webster | Rochester MSA |
| 2022 | 6.5% | 4.8% |
| 2021 | 6.7% | 4.5% |
| 2020 | 5.9% | 4.7% |
| 2019 | 4.4% | 4.1% |
| 2018 | 4.3% | 3.9% |
| 2017 | 2.0% | 3.5% |
| 2016 | 2.5% | 4.3% |
| 2015 | 3.7% | 6.1% |
| 2014 | 3.3% | 6.7% |
| 2013 | 3.6% | 7.1% |
| 2012 | 3.9% | 7.4% |
| 2011 | 5.3% | 7.1% |
| 2010 | 5.7% | 8.1% |
| 2009 | 3.8% | 7.9% |
| 2008 | 3.1% | 5.5% |
| 2007 | 1.7% | 6.0% |

Source: CoStar

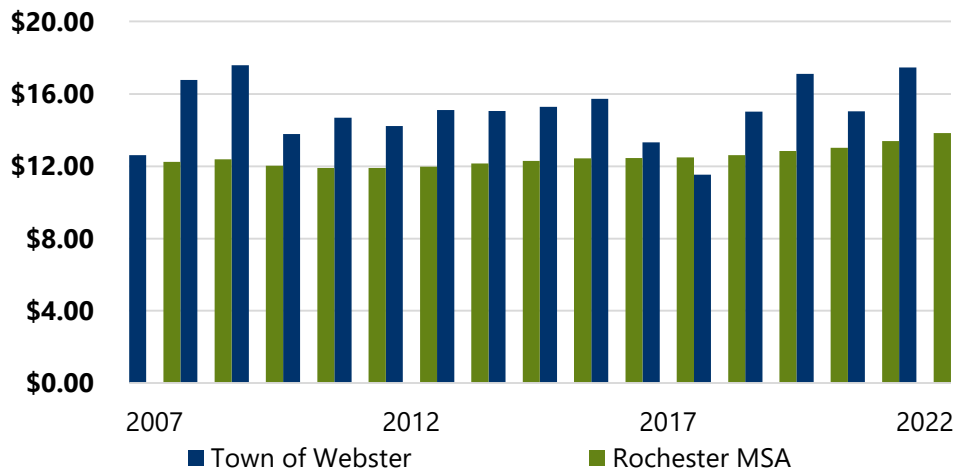


Lease Rates

The trend in leasing rates for retail space in the Town of Webster is one of ups and downs. The rate for space rose above \$17.00 per square foot in 2009, 2020, and 2022. Recent prices are higher in nominal terms, but there's not a clear picture that this is driven by a shortage of space. As recently as 2018 retail lease rates in the area dipped below \$12.00 per square foot. New building has continued to add inventory, meaning that recent price jumps in 2020 and 2022 are not necessarily entirely driven by increased demand.

The market for retail space for the Rochester MSA is slightly more legible, with steady increases in leasing rates over time after downward prices shortly after the 2009 recession. The market experienced a brief lull as prices dipped from \$12.24 per square foot in 2007 to \$11.91 per square foot in 2010. However, as the metro area climbed out of the recession demand picked up and lease rates increased. Growth continued even through the pandemic to reach \$13.83 per square foot in 2022.

Retail Lease Rates



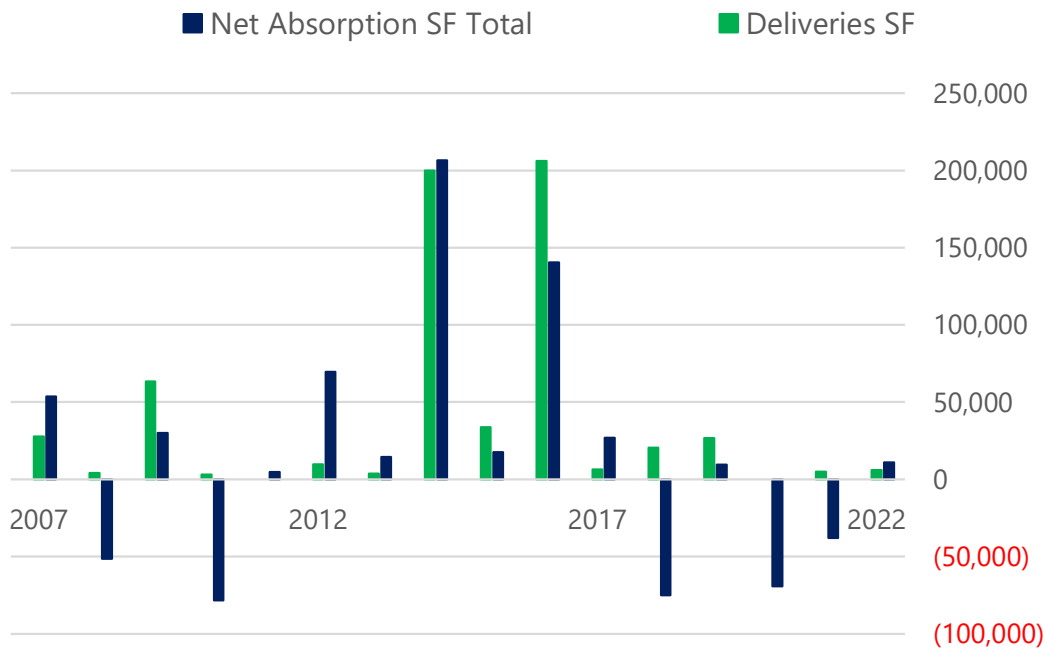
Source: CoStar



Deliveries and Net Absorption

CoStar has data for new retail buildings delivered in the Town of Webster, but it doesn't have data for buildings under construction like it does for some of the other market types. Delivery of new retail space has slowed in the last five years. In 2022 only 6,000 square feet were added, with the five-year average being under 12,000 square feet per year. In 2014 and 2016 the retail market saw the addition of 140,357 and 206,440 square feet, respectively. Both deliveries and absorption have been down since that time, perhaps indicating an inflection point in the market. Three of the subsequent six years had a negative absorption rate. The total net absorption for this period is -135,000.

Retail Market Metrics, Town of Webster

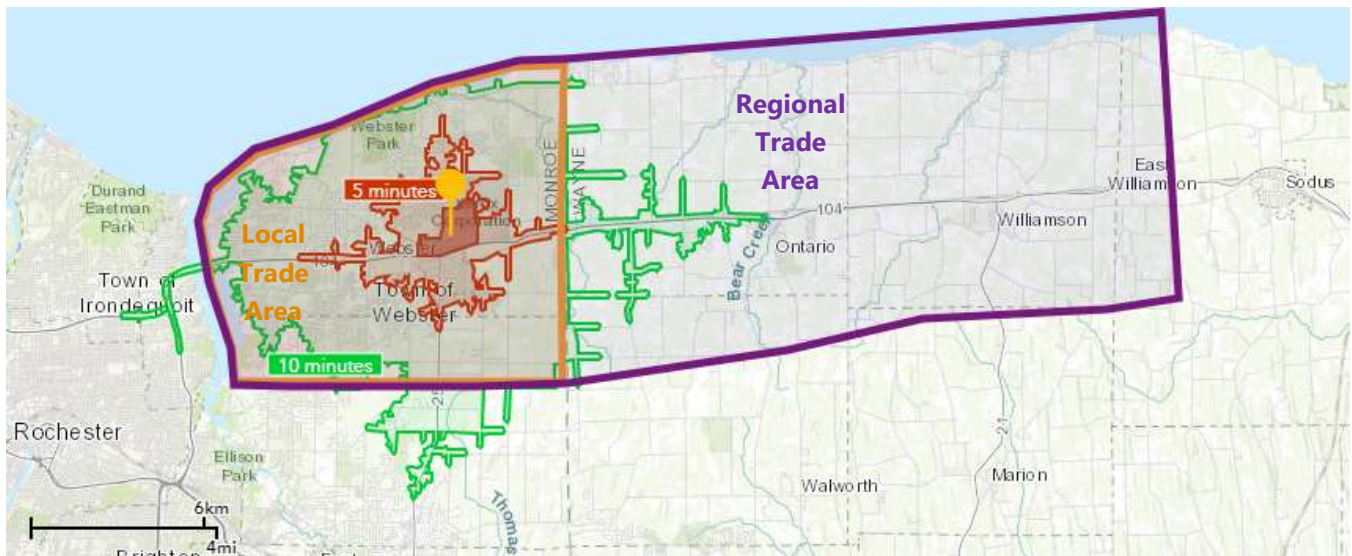


Retail Trade Areas

This analysis considers retail potential within the BOA by establishing two types of retail market areas: a local trade area and a regional trade area. The local trade area delineates the draw area for more “everyday” needs: grocery, pharmacy, personal care services, fitness, quick meals, etc. The local trade roughly aligns with a 10-minute drive time from the BOA and encompasses the Town of Webster and the northern portion of the Town of Penfield. Households living within this area are most likely to shop in Webster for their day-to-day needs, whereas those outside are largely served by stores in the surrounding communities of Irondequoit to the west, Penfield to the south, and Ontario to the east.

The regional trade area applies to stores that attract customers from greater distances for specialized or less frequent purchases. Common types of retail categories with a regional draw include discount department stores, large supermarkets, and other large-format stores such as home improvement centers and warehouse club stores. Stores such as Target, Walmart, BJ’s, Lowe’s, and DICK’s all draw from Webster’s regional trade area. While similar competing offerings are available in communities to the west and south, the regional trade area encompasses more rural households well to the east who routinely travel to Webster for such offerings. This area extends about 15 miles eastward from Webster and includes the communities of Ontario and Williamson, for which Webster is the closest regional retail center.

The local trade area (orange) and regional trade (area) purple are overlaid with 5- and 10-minute drive time radii from the Webster BOA.



Population and Income of Market Areas

Analyzing current and projected population figures by income and age distribution helps to better understand the consumer market by anticipating how household lifestyles and their consumer choices will change over time.

Key Demographics, Retail Trade Areas

| | Local Trade Area | Regional Trade Area |
|-------------------------------------------------|------------------|---------------------|
| Total Population, 2022 | 55,877 | 75,933 |
| Median Age, 2022 | 45.4 | 45.5 |
| Total Households, 2022 | 23,560 | 31,854 |
| Change in Households, 2022-2027 | 185 | 203 |
| Pct. Change in Households, 2022-2027 | 0.8% | 0.6% |
| Median Household Income | \$92,230 | \$88,624 |
| Change in Aggregate Household Income, 2022-2027 | 19.1% | 19.1% |

Source: Esri

The local and regional trade areas have similar consumer characteristics. About 74% of regional trade area households also live within the local trade area. Both areas will see slight increases in population over the next five years. Median household income hovers around \$90,000 for these areas, and aggregate household income is expected to increase by about 19% through 2027.

The table to the right tracks the changing age composition of households in the different retail market areas from 2022 to 2027. The five-year projection shows similar trends across the trade areas.

Expected changes for these areas indicate a shrinking segment of young adults. None of the age cohorts below 35 are expected to increase. While both trade areas expect an increase in the 35–44-year-old cohort, later-career adults (ages 45 to 64) are also expected to decrease as the current segment ages into retirement and old age. The 65+ cohorts are expected to expand substantially.

Projected Change in Households by Age Cohort, 2022-2027

| Age | Local Trade Area | Regional Trade Area |
|--------------|------------------|---------------------|
| <25 | (14) | (24) |
| 25-34 | (40) | (131) |
| 35-44 | 143 | 246 |
| 45-54 | (396) | (613) |
| 55-64 | (450) | (602) |
| 65-74 | 296 | 442 |
| 75+ | 647 | 889 |
| Total | 185 | 203 |

Source: Esri



Consumer Spending

Esri data for the Webster BOA's retail trade area estimates household consumer spending for major categories. The largest segments are for basic necessities: home costs, health services, and food at home. For this area these items total over \$38,000 per household, or approximately 60% of total consumer spending.

The next largest category is Food Away from Home, which amounts to over \$30 million in annual spending or \$4,553 per household. This category's popularity is reflected in the large and diverse mix of restaurants in the area. The other two related categories that make up over 5% of consumer spending are Entertainment/Recreation with \$3,930 per household and Travel with \$3,133 per household each year.

Consumer Spending, Webster BOA Market Area, 2022

| Category | Total Spending | Average Spending |
|-----------------------------------|-----------------------|------------------|
| Apparel & Services | \$ 17,450,905 | \$ 2,580 |
| Education | \$ 14,405,010 | \$ 2,130 |
| Entertainment/Recreation | \$ 26,579,839 | \$ 3,930 |
| Food at Home | \$ 43,984,732 | \$ 6,504 |
| Food Away from Home | \$ 30,791,475 | \$ 4,553 |
| Health Care: Total \$ | \$ 51,805,054 | \$ 7,660 |
| HH Furnishings & Equipment | \$ 18,907,795 | \$ 2,796 |
| Personal Care Products & Services | \$ 7,448,547 | \$ 1,101 |
| Shelter | \$ 163,194,002 | \$ 24,130 |
| Support Payments/Cash | \$ 20,010,622 | \$ 2,959 |
| Travel | \$ 21,188,282 | \$ 3,133 |
| Vehicle Maintenance & Repairs | \$ 9,139,085 | \$ 1,351 |
| Total | \$ 424,905,348 | \$ 62,828 |

Source: Esri



Retail Gap Analysis

Methodology

In a retail gap analysis, the existing retail sales (“supply”) of trade area businesses are compared to the estimated retail spending of trade area residents (“demand”). The difference between demand and supply is referred to as the “retail gap,” which can be positive or negative.

When the demand (spending by trade area residents) for goods or services is greater than sales at local trade area businesses, sales are said to “leak” out of the trade area, creating a positive retail gap (i.e., sales leakage).

Conversely, if the supply of goods sold (local trade area sales) exceeds trade area demand (spending by trade area residents), it is assumed that nonresidents are coming into the trade area and spending money, creating a negative retail gap (i.e., sales surplus).

Sales leakage and sales surplus carry different implications. In many cases, sales leakage presents an opportunity to capture unmet demand in a trade area since a percentage of residential spending occurs outside the area. This demand can be met within the trade area by opening new businesses or expanding existing businesses within retail sectors that show sales leakage. **However, not all retail categories that exhibit sales leakage within a particular trade area are a good fit for the region. Rapidly changing retail norms have long-term consequences for potential buildout of retail space. It is important to consider that while there may be leakage indicated for a certain industry, that leakage could be due to e-commerce and therefore is not a retail category that would be as productive as a brick-and-mortar space.** What were once retail locations may have more economic potential as flex space, office, or redevelopment in housing. This data should be used as a starting point to determine what categories exhibit leakage and whether they are viable for brick-and-mortar locations.

A sales surplus might exist for several reasons. For example, the region might be a popular shopping destination for tourists and other out-of-towners, or a cluster of competing businesses offering a similar product or service may be located within the trade area, creating a specialty cluster that draws in spending by households from outside the trade area. Alternatively, a sales surplus could be an indicator of market saturation.

The following Retail Gap Analysis table contains a list of industries by 6-digit NAICS codes and includes figures for sales demand (estimated purchases by Webster residents both in and out of Webster), sales supply (existing sales within Webster), and retail gap (demand minus supply).



Retail Potential Analysis: Local Trade Area

Next, a Retail Potential Analysis compares the Retail Sales Gap to the typical sales per establishment for a given industry to determine if the sales gap is substantial enough to support new potential businesses and/or expansion of existing stores.

The tables below take the information from the previous gap analysis and uses two informed assumptions to make this evaluation:

- Assume that a prospective new business or expanding existing business could successfully capture 25% of the undersupplied retail activity.
- Use information about the average size of firms (Upstate NY averages for sales per business location) to see if the recaptured sales are sufficient for business formation or expansion.

Summary

Supportable Potential Businesses

The convenience retail market area has three "gaps" where recapture of lost spending from residents could potentially support new business: Gasoline Stations with Convenience Stores, Nail Salons, and Snack and Nonalcoholic Beverage Bars.

Supportable Retail Businesses, Webster Local Trade Area

| NAICS | Description | 25% Recapture | Average Sales per Business | Supportable Businesses |
|--------|-------------------------------------------|---------------|----------------------------|------------------------|
| 447110 | Gasoline Stations with Convenience Stores | \$3,484,827 | \$1,630,582 | 2.1 |
| 812113 | Nail Salons | \$502,747 | \$283,207 | 1.8 |
| 722515 | Snack and Nonalcoholic Beverage Bars | \$1,169,072 | \$663,346 | 1.8 |



Supportable Retail Businesses, Webster Local Trade Area

| NAICS | Description | 2022 Total Demand | 2022 Total Sales | Retail Gap | 25% Recapture | Average Sales per Business | Supportable Businesses |
|------------------------------------------|------------------------------------------------------------|-------------------|------------------|---------------|---------------|----------------------------|------------------------|
| Food & Beverage Stores | | | | | | | |
| 445110 | Supermarkets and Other Grocery (except Convenience) Stores | \$36,044,447 | \$38,311,804 | (\$2,267,357) | (\$566,839) | \$4,484,751 | (0.1) |
| 445120 | Convenience Stores | \$2,507,594 | \$2,742,424 | (\$234,830) | (\$58,707) | \$504,137 | (0.1) |
| 445210 | Meat Markets | \$930,369 | \$256,072 | \$674,297 | \$168,574 | \$1,066,545 | 0.2 |
| 445220 | Fish and Seafood Markets | \$301,814 | \$6,287 | \$295,527 | \$73,882 | \$665,706 | 0.1 |
| 445230 | Fruit and Vegetable Markets | \$767,238 | \$1,490,456 | (\$723,218) | (\$180,804) | \$883,073 | (0.2) |
| 445291 | Baked Goods Stores | \$513,306 | \$249,358 | \$263,948 | \$65,987 | \$1,578,331 | 0.0 |
| 445292 | Confectionery and Nut Stores | \$445,113 | \$77,829 | \$367,284 | \$91,821 | \$589,414 | 0.2 |
| 445299 | All Other Specialty Food Stores | \$1,389,907 | \$730,307 | \$659,600 | \$164,900 | \$0 | 0.0 |
| 445310 | Beer, Wine, and Liquor Stores | \$2,577,083 | \$6,044,893 | (\$3,467,810) | (\$866,952) | \$593,379 | (1.5) |
| 311811 | Retail Bakeries | \$1,718,863 | \$77,556 | \$1,641,308 | \$410,327 | \$1,184,606 | 0.3 |
| 312120 | Breweries | \$9,628,558 | \$7,151,680 | \$2,476,878 | \$619,219 | \$15,077,375 | 0.0 |
| 312130 | Wineries | \$3,513,251 | \$4,106,014 | (\$592,763) | (\$148,191) | \$2,760,006 | (0.1) |
| 312140 | Distilleries | \$3,857,986 | \$4,890,395 | (\$1,032,409) | (\$258,102) | \$10,887,567 | (0.0) |
| Health & Personal Care Stores | | | | | | | |
| 446110 | Pharmacies and Drug Stores | \$14,114,596 | \$18,791,222 | (\$4,676,626) | (\$1,169,157) | \$1,548,443 | (0.8) |
| 446120 | Cosmetics, Beauty Supplies, and Perfume Stores | \$2,783,155 | \$3,594,839 | (\$811,684) | (\$202,921) | \$704,380 | (0.3) |
| 446130 | Optical Goods Stores | \$1,239,730 | \$1,446,345 | (\$206,615) | (\$51,654) | \$1,214,536 | (0.0) |
| 446191 | Food (Health) Supplement Stores | \$966,106 | \$1,251,079 | (\$284,972) | (\$71,243) | \$562,608 | (0.1) |
| 446199 | All Other Health and Personal Care Stores | \$1,975,992 | \$2,523,988 | (\$547,996) | (\$136,999) | \$1,387,951 | (0.1) |
| 812111 | Barber Shops | \$1,051,401 | \$908,584 | \$142,818 | \$35,704 | \$1,189,036 | 0.0 |
| 812112 | Beauty Salons | \$8,582,510 | \$6,940,090 | \$1,642,420 | \$410,605 | \$930,323 | 0.4 |
| 812113 | Nail Salons | \$2,959,551 | \$948,565 | \$2,010,986 | \$502,747 | \$283,207 | 1.8 |
| 812191 | Diet and Weight Reducing Centers | \$242,970 | \$227,861 | \$15,109 | \$3,777 | \$343,763 | 0.0 |



| NAICS | Description | 2022 Total Demand | 2022 Total Sales | Retail Gap | 25% Recapture | Average Sales per Business | Supportable Businesses |
|-------------------------------------------------------|------------------------------------------------|-------------------|------------------|----------------|---------------|----------------------------|------------------------|
| Clothing and Accessories Stores | | | | | | | |
| 448110 | Men's Clothing Stores | \$1,056,490 | \$15,795 | \$1,040,695 | \$260,174 | \$1,331,526 | 0.2 |
| 448120 | Women's Clothing Stores | \$4,544,739 | \$1,726,400 | \$2,818,340 | \$704,585 | \$1,005,634 | 0.7 |
| 448130 | Children's and Infants' Clothing Stores | \$762,895 | \$347,260 | \$415,635 | \$103,909 | \$1,103,162 | 0.1 |
| 448140 | Family Clothing Stores | \$7,725,000 | \$2,831,171 | \$4,893,828 | \$1,223,457 | \$1,396,433 | 0.9 |
| 448150 | Clothing Accessories Stores | \$1,721,873 | \$337,606 | \$1,384,267 | \$346,067 | \$1,182,969 | 0.3 |
| 448190 | Other Clothing Stores | \$3,025,702 | \$1,188,549 | \$1,837,153 | \$459,288 | \$1,802,315 | 0.3 |
| 448210 | Shoe Stores | \$3,536,494 | \$3,182,582 | \$353,912 | \$88,478 | \$1,055,893 | 0.1 |
| 448310 | Jewelry Stores | \$4,821,168 | \$3,104,143 | \$1,717,025 | \$429,256 | \$1,374,600 | 0.3 |
| 448320 | Luggage and Leather Goods Stores | \$489,063 | \$0 | \$489,063 | \$122,266 | \$842,843 | 0.1 |
| Home Improvement and Furnishings Stores | | | | | | | |
| 442110 | Furniture Stores | \$5,496,540 | \$6,275,442 | (\$778,902) | (\$194,725) | \$1,632,480 | (0.1) |
| 442210 | Floor Covering Stores | \$2,170,310 | \$3,875,720 | (\$1,705,410) | (\$426,353) | \$1,213,198 | (0.4) |
| 442291 | Window Treatment Stores | \$320,950 | \$185,257 | \$135,692 | \$33,923 | \$880,488 | 0.0 |
| 442299 | All Other Home Furnishings Stores | \$2,211,768 | \$2,360,282 | (\$148,514) | (\$37,129) | \$1,216,967 | (0.0) |
| 443141 | Household Appliance Stores | \$1,220,838 | \$1,439,082 | (\$218,244) | (\$54,561) | \$1,364,688 | (0.0) |
| 443142 | Electronics Stores | \$10,420,872 | \$8,946,202 | \$1,474,670 | \$368,667 | \$1,505,386 | 0.2 |
| 444110 | Home Centers | \$15,962,543 | \$28,251,637 | (\$12,289,093) | (\$3,072,273) | \$9,284,841 | (0.3) |
| 444120 | Paint and Wallpaper Stores | \$1,387,108 | \$782,246 | \$604,862 | \$151,216 | \$957,160 | 0.2 |
| 444130 | Hardware Stores | \$3,562,933 | \$3,262,409 | \$300,524 | \$75,131 | \$1,223,112 | 0.1 |
| 444190 | Other Building Material Dealers | \$9,907,784 | \$25,844,667 | (\$15,936,883) | (\$3,984,221) | \$2,968,456 | (1.3) |
| 444210 | Outdoor Power Equipment Stores | \$1,017,214 | \$2,753,074 | (\$1,735,861) | (\$433,965) | \$2,006,838 | (0.2) |
| 444220 | Nursery, Garden Center, and Farm Supply Stores | \$3,268,274 | \$5,864,155 | (\$2,595,881) | (\$648,970) | \$2,006,026 | (0.3) |
| Sporting Goods, Hobby, Book & Music Stores | | | | | | | |
| 451110 | Sporting Goods Stores | \$4,494,575 | \$4,093,004 | \$401,571 | \$100,393 | \$1,258,605 | 0.1 |
| 451120 | Hobby, Toy, and Game Stores | \$1,716,802 | \$4,902,364 | (\$3,185,563) | (\$796,391) | \$1,016,412 | (0.8) |
| 451130 | Sewing, Needlework, and Piece Goods Stores | \$587,915 | \$447,015 | \$140,900 | \$35,225 | \$747,963 | 0.0 |
| 451140 | Musical Instrument and Supplies Stores | \$599,739 | \$1,424,370 | (\$824,631) | (\$206,158) | \$835,273 | (0.2) |
| 451211 | Book Stores | \$819,847 | \$3,351,205 | (\$2,531,358) | (\$632,839) | \$832,677 | (0.8) |
| 451212 | News Dealers and Newsstands | \$104,336 | \$265,061 | (\$160,724) | (\$40,181) | \$365,340 | (0.1) |



| NAICS | Description | 2022 Total Demand | 2022 Total Sales | Retail Gap | 25% Recapture | Average Sales per Business | Supportable Businesses |
|------------------------------------------|-----------------------------------------------------------------|-------------------|------------------|----------------|----------------|----------------------------|------------------------|
| General Merchandise Stores | | | | | | | |
| 452210 | Department Stores | \$12,671,134 | \$33,299,150 | (\$20,628,016) | (\$5,157,004) | \$7,377,243 | (0.7) |
| 452311 | Warehouse Clubs and Supercenters | \$25,452,415 | \$31,933,253 | (\$6,480,839) | (\$1,620,210) | \$31,507,055 | (0.1) |
| 452319 | All Other General Merchandise Stores | \$6,876,897 | \$11,096,867 | (\$4,219,969) | (\$1,054,992) | \$1,150,275 | (0.9) |
| Gasoline Stations | | | | | | | |
| 447110 | Gasoline Stations with Convenience Stores | \$19,401,717 | \$5,462,407 | \$13,939,310 | \$3,484,827 | \$1,630,582 | 2.1 |
| 447190 | Other Gasoline Stations | \$2,785,390 | \$281,620 | \$2,503,769 | \$625,942 | \$2,002,072 | 0.3 |
| Motor Vehicle & Parts Dealers | | | | | | | |
| 441110 | New Car Dealers | \$37,834,293 | \$123,694,216 | (\$85,859,923) | (\$21,464,981) | \$9,495,774 | (2.3) |
| 441120 | Used Car Dealers | \$6,802,397 | \$9,524,330 | (\$2,721,934) | (\$680,483) | \$2,129,520 | (0.3) |
| 441210 | Recreational Vehicle Dealers | \$1,881,833 | \$3,475,922 | (\$1,594,089) | (\$398,522) | \$5,798,701 | (0.1) |
| 441222 | Boat Dealers | \$1,063,306 | \$344,148 | \$719,158 | \$179,789 | \$1,189,347 | 0.2 |
| 441228 | Motorcycle, ATV, and All Other Motor Vehicle Dealers | \$1,923,884 | \$435,914 | \$1,487,970 | \$371,992 | \$1,468,858 | 0.3 |
| 441310 | Automotive Parts and Accessories Stores | \$6,216,758 | \$7,712,108 | (\$1,495,349) | (\$373,837) | \$1,018,482 | (0.4) |
| 441320 | Tire Dealers | \$3,919,676 | \$14,672,059 | (\$10,752,383) | (\$2,688,096) | \$1,401,350 | (1.9) |
| Miscellaneous Store Retailers | | | | | | | |
| 453110 | Florists | \$1,270,581 | \$1,615,528 | (\$344,946) | (\$86,237) | \$714,455 | (0.1) |
| 453210 | Office Supplies and Stationery Stores | \$1,651,690 | \$3,250,530 | (\$1,598,840) | (\$399,710) | \$1,125,180 | (0.4) |
| 453220 | Gift, Novelty, and Souvenir Stores | \$2,321,981 | \$8,370,947 | (\$6,048,967) | (\$1,512,242) | \$997,184 | (1.5) |
| 453310 | Used Merchandise Stores | \$3,279,053 | \$6,327,686 | (\$3,048,633) | (\$762,158) | \$1,392,959 | (0.5) |
| 453910 | Pet and Pet Supplies Stores | \$2,026,765 | \$5,673,816 | (\$3,647,051) | (\$911,763) | \$1,422,982 | (0.6) |
| 453920 | Art Dealers | \$1,055,434 | \$27,248 | \$1,028,186 | \$257,047 | \$1,741,208 | 0.1 |
| 453930 | Manufactured (Mobile) Home Dealers | \$499,021 | \$29,218 | \$469,803 | \$117,451 | \$1,042,971 | 0.1 |
| 453991 | Tobacco Stores | \$1,987,702 | \$713,764 | \$1,273,939 | \$318,485 | \$1,228,259 | 0.3 |
| 453998 | All Other Miscellaneous Store Retailers (except Tobacco Stores) | \$6,750,782 | \$6,033,985 | \$716,797 | \$179,199 | \$2,481,105 | 0.1 |
| 454310 | Fuel Dealers | \$3,713,668 | \$365,611 | \$3,348,057 | \$837,014 | \$3,386,657 | 0.2 |



| NAICS | Description | 2022 Total Demand | 2022 Total Sales | Retail Gap | 25% Recapture | Average Sales per Business | Supportable Businesses |
|--------------------------------------------|---------------------------------------------------------|-------------------|------------------|-----------------|----------------|----------------------------|------------------------|
| Food Services & Drinking Places | | | | | | | |
| 722310 | Food Service Contractors | \$6,027,946 | \$2,374,238 | \$3,653,708 | \$913,427 | \$1,641,823 | 0.6 |
| 722320 | Caterers | \$2,313,066 | \$747,693 | \$1,565,373 | \$391,343 | \$894,741 | 0.4 |
| 722330 | Mobile Food Services | \$1,006,229 | \$48,481 | \$957,749 | \$239,437 | \$1,159,782 | 0.2 |
| 722410 | Drinking Places (Alcoholic Beverages) | \$2,699,129 | \$5,739,899 | (\$3,040,770) | (\$760,193) | \$413,638 | (1.8) |
| 722511 | Full-Service Restaurants | \$65,127,993 | \$62,443,404 | \$2,684,590 | \$671,147 | \$1,523,862 | 0.4 |
| 722513 | Limited-Service Restaurants | \$71,163,198 | \$257,767,572 | (\$186,604,374) | (\$46,651,094) | \$2,035,585 | (22.9) |
| 722514 | Cafeterias, Grill Buffets, and Buffets | \$395,998 | \$265,522 | \$130,476 | \$32,619 | \$589,436 | 0.1 |
| 722515 | Snack and Nonalcoholic Beverage Bars | \$4,832,700 | \$156,410 | \$4,676,290 | \$1,169,072 | \$663,346 | 1.8 |
| Recreation Establishments | | | | | | | |
| 512131 | Motion Picture Theaters (except Drive-Ins) | \$606,231 | \$2,189,964 | (\$1,583,733) | (\$395,933) | \$1,457,659 | (0.3) |
| 512132 | Drive-In Motion Picture Theaters | \$7,470 | \$0 | \$7,470 | \$1,867 | \$418,205 | 0.0 |
| 713940 | Fitness and Recreational Sports Centers | \$5,269,595 | \$18,219,587 | (\$12,949,993) | (\$3,237,498) | \$787,174 | (4.1) |
| 713950 | Bowling Centers | \$589,257 | \$10,591 | \$578,666 | \$144,666 | \$700,848 | 0.2 |
| Miscellaneous Services | | | | | | | |
| 812310 | Coin-Operated Laundries and Drycleaners | \$263,746 | \$48,952 | \$214,794 | \$53,698 | \$320,342 | 0.2 |
| 812320 | Drycleaning and Laundry Services (except Coin-Operated) | \$603,260 | \$96,226 | \$507,034 | \$126,758 | \$505,431 | 0.3 |
| 812910 | Pet Care (except Veterinary) Services | \$1,661,545 | \$979,676 | \$681,869 | \$170,467 | \$527,231 | 0.3 |
| 812921 | Photofinishing Laboratories (except One-Hour) | \$92,241 | \$3,363 | \$88,878 | \$22,220 | \$844,914 | 0.0 |
| 812922 | One-Hour Photofinishing | \$292 | \$0 | \$292 | \$73 | | |

Source: Lightcast



Retail Potential Analysis: Regional Trade Area

Summary

Supportable Potential Businesses

The gaps in spending for the Regional Trade Area are more numerous and substantial than for the Local Trade Area. Beyond gas stations, nail salons, and snack bars identified for the Local Trade Area, restaurants and clothing stores are also opportunities for recapturing lost spending to support retail expansion.

Supportable Retail Businesses, Webster Regional Trade Area

| NAICS | Description | 25% Recapture | Average Sales per Business | Supportable Businesses |
|--------|-------------------------------------------|------------------|----------------------------------|---------------------------|
| 447110 | Gasoline Stations with Convenience Stores | \$4,627,608 | \$1,630,582 | 2.8 |
| 722511 | Full-Service Restaurants | \$3,978,495 | \$1,523,862 | 2.6 |
| 812113 | Nail Salons | \$729,348 | \$283,207 | 2.6 |
| 722515 | Snack and Nonalcoholic Beverage Bars | \$1,481,774 | \$663,346 | 2.2 |
| 448140 | Family Clothing Stores | \$1,885,716 | \$1,396,433 | 1.4 |
| 448120 | Women's Clothing Stores | \$1,084,105 | \$1,005,634 | 1.1 |



Supportable Retail Businesses, Webster Regional Trade Area

| NAICS | Description | 2022 Total Demand | 2022 Total Sales | Retail Gap | 25% Recapture | Average Sales per Business | Supportable Businesses |
|------------------------------------------|------------------------------------------------------------|-------------------|------------------|----------------|---------------|----------------------------|------------------------|
| Food & Beverage Stores | | | | | | | |
| 445110 | Supermarkets and Other Grocery (except Convenience) Stores | \$48,740,535 | \$56,182,495 | (\$7,441,960) | (\$1,860,490) | \$4,484,751 | (0.4) |
| 445120 | Convenience Stores | \$3,388,240 | \$3,235,608 | \$152,632 | \$38,158 | \$504,137 | 0.1 |
| 445210 | Meat Markets | \$1,256,827 | \$678,012 | \$578,815 | \$144,704 | \$1,066,545 | 0.1 |
| 445220 | Fish and Seafood Markets | \$405,604 | \$23,870 | \$381,734 | \$95,433 | \$665,706 | 0.1 |
| 445230 | Fruit and Vegetable Markets | \$1,034,801 | \$1,546,049 | (\$511,248) | (\$127,812) | \$883,073 | (0.1) |
| 445291 | Baked Goods Stores | \$689,706 | \$281,941 | \$407,765 | \$101,941 | \$1,578,331 | 0.1 |
| 445292 | Confectionery and Nut Stores | \$598,130 | \$77,829 | \$520,301 | \$130,075 | \$589,414 | 0.2 |
| 445299 | All Other Specialty Food Stores | \$1,877,664 | \$851,770 | \$1,025,894 | \$256,474 | \$0 | |
| 445310 | Beer, Wine, and Liquor Stores | \$3,481,336 | \$6,322,028 | (\$2,840,692) | (\$710,173) | \$593,379 | (1.2) |
| 311811 | Retail Bakeries | \$2,297,440 | \$77,556 | \$2,219,885 | \$554,971 | \$1,184,606 | 0.5 |
| 312120 | Breweries | \$12,347,220 | \$7,469,150 | \$4,878,069 | \$1,219,517 | \$15,077,375 | 0.1 |
| 312130 | Wineries | \$5,036,528 | \$9,821,453 | (\$4,784,926) | (\$1,196,231) | \$2,760,006 | (0.4) |
| 312140 | Distilleries | \$6,109,360 | \$28,839,471 | (\$22,730,111) | (\$5,682,528) | \$10,887,567 | (0.5) |
| Health & Personal Care Stores | | | | | | | |
| 446110 | Pharmacies and Drug Stores | \$19,064,594 | \$20,349,193 | (\$1,284,599) | (\$321,150) | \$1,548,443 | (0.2) |
| 446120 | Cosmetics, Beauty Supplies, and Perfume Stores | \$3,756,054 | \$3,594,839 | \$161,214 | \$40,304 | \$704,380 | 0.1 |
| 446130 | Optical Goods Stores | \$1,673,277 | \$1,470,725 | \$202,552 | \$50,638 | \$1,214,536 | 0.0 |
| 446191 | Food (Health) Supplement Stores | \$1,303,947 | \$1,672,089 | (\$368,142) | (\$92,036) | \$562,608 | (0.2) |
| 446199 | All Other Health and Personal Care Stores | \$2,667,891 | \$2,773,840 | (\$105,949) | (\$26,487) | \$1,387,951 | (0.0) |
| 812111 | Barber Shops | \$1,418,769 | \$1,336,613 | \$82,157 | \$20,539 | \$1,189,036 | 0.0 |
| 812112 | Beauty Salons | \$11,581,139 | \$8,543,192 | \$3,037,947 | \$759,487 | \$930,323 | 0.8 |
| 812113 | Nail Salons | \$3,993,940 | \$1,076,550 | \$2,917,391 | \$729,348 | \$283,207 | 2.6 |
| 812191 | Diet and Weight Reducing Centers | \$327,878 | \$227,861 | \$100,017 | \$25,004 | \$343,763 | 0.1 |



| NAICS | Description | 2022 Total Demand | 2022 Total Sales | Retail Gap | 25% Recapture | Average Sales per Business | Supportable Businesses |
|-------------------------------------------------------|------------------------------------------------|-------------------|------------------|----------------|---------------|----------------------------|------------------------|
| Clothing and Accessories Stores | | | | | | | |
| 448110 | Men's Clothing Stores | \$1,423,001 | \$19,303 | \$1,403,698 | \$350,924 | \$1,331,526 | 0.3 |
| 448120 | Women's Clothing Stores | \$6,123,376 | \$1,786,956 | \$4,336,420 | \$1,084,105 | \$1,005,634 | 1.1 |
| 448130 | Children's and Infants' Clothing Stores | \$1,025,391 | \$349,938 | \$675,453 | \$168,863 | \$1,103,162 | 0.2 |
| 448140 | Family Clothing Stores | \$10,401,401 | \$2,858,537 | \$7,542,864 | \$1,885,716 | \$1,396,433 | 1.4 |
| 448150 | Clothing Accessories Stores | \$2,318,681 | \$381,788 | \$1,936,893 | \$484,223 | \$1,182,969 | 0.4 |
| 448190 | Other Clothing Stores | \$4,074,363 | \$1,215,563 | \$2,858,801 | \$714,700 | \$1,802,315 | 0.4 |
| 448210 | Shoe Stores | \$4,760,276 | \$3,204,292 | \$1,555,984 | \$388,996 | \$1,055,893 | 0.4 |
| 448310 | Jewelry Stores | \$6,496,587 | \$3,122,032 | \$3,374,555 | \$843,639 | \$1,374,600 | 0.6 |
| 448320 | Luggage and Leather Goods Stores | \$658,750 | \$0 | \$658,750 | \$164,688 | \$842,843 | 0.2 |
| Home Improvement and Furnishings Stores | | | | | | | |
| 442110 | Furniture Stores | \$7,358,822 | \$6,487,370 | \$871,452 | \$217,863 | \$1,632,480 | 0.1 |
| 442210 | Floor Covering Stores | \$2,906,494 | \$3,931,276 | (\$1,024,782) | (\$256,196) | \$1,213,198 | (0.2) |
| 442291 | Window Treatment Stores | \$429,440 | \$185,257 | \$244,183 | \$61,046 | \$880,488 | 0.1 |
| 442299 | All Other Home Furnishings Stores | \$2,961,436 | \$2,387,273 | \$574,163 | \$143,541 | \$1,216,967 | 0.1 |
| 443141 | Household Appliance Stores | \$1,633,781 | \$1,642,168 | (\$8,387) | (\$2,097) | \$1,364,688 | (0.0) |
| 443142 | Electronics Stores | \$13,963,940 | \$9,071,828 | \$4,892,112 | \$1,223,028 | \$1,505,386 | 0.8 |
| 444110 | Home Centers | \$20,480,571 | \$38,395,411 | (\$17,914,840) | (\$4,478,710) | \$9,284,841 | (0.5) |
| 444120 | Paint and Wallpaper Stores | \$1,777,227 | \$888,994 | \$888,233 | \$222,058 | \$957,160 | 0.2 |
| 444130 | Hardware Stores | \$4,572,706 | \$4,440,903 | \$131,803 | \$32,951 | \$1,223,112 | 0.0 |
| 444190 | Other Building Material Dealers | \$12,714,553 | \$37,380,396 | (\$24,665,843) | (\$6,166,461) | \$2,968,456 | (2.1) |
| 444210 | Outdoor Power Equipment Stores | \$1,299,952 | \$4,585,892 | (\$3,285,941) | (\$821,485) | \$2,006,838 | (0.4) |
| 444220 | Nursery, Garden Center, and Farm Supply Stores | \$4,195,263 | \$15,365,250 | (\$11,169,986) | (\$2,792,497) | \$2,006,026 | (1.4) |
| Sporting Goods, Hobby, Book & Music Stores | | | | | | | |
| 451110 | Sporting Goods Stores | \$6,022,067 | \$4,286,716 | \$1,735,351 | \$433,838 | \$1,258,605 | 0.3 |
| 451120 | Hobby, Toy, and Game Stores | \$2,293,676 | \$4,929,621 | (\$2,635,944) | (\$658,986) | \$1,016,412 | (0.6) |
| 451130 | Sewing, Needlework, and Piece Goods Stores | \$786,821 | \$476,994 | \$309,827 | \$77,457 | \$747,963 | 0.1 |
| 451140 | Musical Instrument and Supplies Stores | \$802,452 | \$1,424,370 | (\$621,918) | (\$155,479) | \$835,273 | (0.2) |
| 451211 | Book Stores | \$1,096,975 | \$3,361,126 | (\$2,264,151) | (\$566,038) | \$832,677 | (0.7) |
| 451212 | News Dealers and Newsstands | \$139,444 | \$267,555 | (\$128,110) | (\$32,028) | \$365,340 | (0.1) |



| NAICS | Description | 2022 Total Demand | 2022 Total Sales | Retail Gap | 25% Recapture | Average Sales per Business | Supportable Businesses |
|------------------------------------------|-----------------------------------------------------------------|-------------------|------------------|----------------|----------------|----------------------------|------------------------|
| General Merchandise Stores | | | | | | | |
| 452210 | Department Stores | \$17,084,867 | \$33,299,150 | (\$16,214,282) | (\$4,053,571) | \$7,377,243 | (0.5) |
| 452311 | Warehouse Clubs and Supercenters | \$34,316,774 | \$40,624,743 | (\$6,307,970) | (\$1,576,992) | \$31,507,055 | (0.1) |
| 452319 | All Other General Merchandise Stores | \$9,273,284 | \$16,267,179 | (\$6,993,895) | (\$1,748,474) | \$1,150,275 | (1.5) |
| Gasoline Stations | | | | | | | |
| 447110 | Gasoline Stations with Convenience Stores | \$29,185,420 | \$10,674,989 | \$18,510,431 | \$4,627,608 | \$1,630,582 | 2.8 |
| 447190 | Other Gasoline Stations | \$4,186,536 | \$1,236,083 | \$2,950,453 | \$737,613 | \$2,002,072 | 0.4 |
| Motor Vehicle & Parts Dealers | | | | | | | |
| 441110 | New Car Dealers | \$49,947,265 | \$128,346,266 | (\$78,399,000) | (\$19,599,750) | \$9,495,774 | (2.1) |
| 441120 | Used Car Dealers | \$8,974,453 | \$20,300,923 | (\$11,326,470) | (\$2,831,617) | \$2,129,520 | (1.3) |
| 441210 | Recreational Vehicle Dealers | \$2,482,898 | \$3,500,049 | (\$1,017,151) | (\$254,288) | \$5,798,701 | (0.0) |
| 441222 | Boat Dealers | \$1,399,541 | \$1,322,995 | \$76,546 | \$19,136 | \$1,189,347 | 0.0 |
| 441228 | Motorcycle, ATV, and All Other Motor Vehicle Dealers | \$2,538,185 | \$1,052,768 | \$1,485,417 | \$371,354 | \$1,468,858 | 0.3 |
| 441310 | Automotive Parts and Accessories Stores | \$8,205,564 | \$11,346,473 | (\$3,140,910) | (\$785,227) | \$1,018,482 | (0.8) |
| 441320 | Tire Dealers | \$5,171,298 | \$16,468,118 | (\$11,296,820) | (\$2,824,205) | \$1,401,350 | (2.0) |
| Miscellaneous Store Retailers | | | | | | | |
| 453110 | Florists | \$1,700,160 | \$1,888,093 | (\$187,932) | (\$46,983) | \$714,455 | (0.1) |
| 453210 | Office Supplies and Stationery Stores | \$2,210,026 | \$3,250,530 | (\$1,040,504) | (\$260,126) | \$1,125,180 | (0.2) |
| 453220 | Gift, Novelty, and Souvenir Stores | \$3,109,283 | \$9,711,175 | (\$6,601,892) | (\$1,650,473) | \$997,184 | (1.7) |
| 453310 | Used Merchandise Stores | \$4,389,040 | \$7,033,576 | (\$2,644,537) | (\$661,134) | \$1,392,959 | (0.5) |
| 453910 | Pet and Pet Supplies Stores | \$2,710,219 | \$5,980,605 | (\$3,270,386) | (\$817,596) | \$1,422,982 | (0.6) |
| 453920 | Art Dealers | \$1,411,932 | \$66,258 | \$1,345,674 | \$336,418 | \$1,741,208 | 0.2 |
| 453930 | Manufactured (Mobile) Home Dealers | \$667,681 | \$29,218 | \$638,463 | \$159,616 | \$1,042,971 | 0.2 |
| 453991 | Tobacco Stores | \$2,657,871 | \$3,429,752 | (\$771,881) | (\$192,970) | \$1,228,259 | (0.2) |
| 453998 | All Other Miscellaneous Store Retailers (except Tobacco Stores) | \$9,043,558 | \$7,625,031 | \$1,418,527 | \$354,632 | \$2,481,105 | 0.1 |
| 454310 | Fuel Dealers | \$5,005,700 | \$653,421 | \$4,352,280 | \$1,088,070 | \$3,386,657 | 0.3 |



| NAICS | Description | 2022 Total Demand | 2022 Total Sales | Retail Gap | 25% Recapture | Average Sales per Business | Supportable Businesses |
|--------------------------------------------|---------------------------------------------------------|-------------------|------------------|-----------------|----------------|----------------------------|------------------------|
| Food Services & Drinking Places | | | | | | | |
| 722310 | Food Service Contractors | \$7,793,674 | \$3,732,006 | \$4,061,668 | \$1,015,417 | \$1,641,823 | 0.6 |
| 722320 | Caterers | \$2,990,730 | \$1,256,279 | \$1,734,451 | \$433,613 | \$894,741 | 0.5 |
| 722330 | Mobile Food Services | \$1,296,669 | \$298,801 | \$997,868 | \$249,467 | \$1,159,782 | 0.2 |
| 722410 | Drinking Places (Alcoholic Beverages) | \$3,491,614 | \$5,811,273 | (\$2,319,659) | (\$579,915) | \$413,638 | (1.4) |
| 722511 | Full-Service Restaurants | \$89,026,210 | \$73,112,230 | \$15,913,980 | \$3,978,495 | \$1,523,862 | 2.6 |
| 722513 | Limited-Service Restaurants | \$95,849,454 | \$276,030,279 | (\$180,180,824) | (\$45,045,206) | \$2,035,585 | (22.1) |
| 722514 | Cafeterias, Grill Buffets, and Buffets | \$511,895 | \$266,302 | \$245,593 | \$61,398 | \$589,436 | 0.1 |
| 722515 | Snack and Nonalcoholic Beverage Bars | \$6,249,869 | \$322,774 | \$5,927,094 | \$1,481,774 | \$663,346 | 2.2 |
| Recreation Establishments | | | | | | | |
| 512131 | Motion Picture Theaters (except Drive-Ins) | \$751,364 | \$2,224,341 | (\$1,472,976) | (\$368,244) | \$1,457,659 | (0.3) |
| 512132 | Drive-In Motion Picture Theaters | \$9,116 | \$0 | \$9,116 | \$2,279 | \$418,205 | 0.0 |
| 713940 | Fitness and Recreational Sports Centers | \$7,125,986 | \$18,299,492 | (\$11,173,506) | (\$2,793,376) | \$787,174 | (3.5) |
| 713950 | Bowling Centers | \$794,187 | \$26,931 | \$767,256 | \$191,814 | \$700,848 | 0.3 |
| Miscellaneous Services | | | | | | | |
| 812310 | Coin-Operated Laundries and Drycleaners | \$346,415 | \$49,359 | \$297,057 | \$74,264 | \$320,342 | 0.2 |
| 812320 | Drycleaning and Laundry Services (except Coin-Operated) | \$792,559 | \$98,807 | \$693,752 | \$173,438 | \$505,431 | 0.3 |
| 812910 | Pet Care (except Veterinary) Services | \$2,263,265 | \$1,011,096 | \$1,252,170 | \$313,042 | \$527,231 | 0.6 |
| 812921 | Photofinishing Laboratories (except One-Hour) | \$125,366 | \$3,363 | \$122,003 | \$30,501 | \$844,914 | 0.0 |
| 812922 | One-Hour Photofinishing | \$395 | \$0 | \$395 | \$99 | | |

Source: Lightcast



7. OFFICE ANALYSIS

Office Market Opportunities

The fundamentals in the Rochester MSA and the Town of Webster describe a healthy and recovering office sector that may be poised for some slight turbulence as absorption slows and the medium-term forecast for employment dims. However, these small notes of caution occur against a national trend of crisis in the office market, as employers try to get workers to relinquish remote work arrangements. Locations differ and range from troubled (Charlotte, 11.4% vacancy) to cratering (San Francisco, 19.1% vacancy).

The Webster BOA site offers key benefits with direct highway access and proximity to a professional workforce. Its position near research and development activity, industrial activity, and multiple diverse retail amenities would increase its viability under normal circumstances. However, without a specific large tenant lined up, the prospects of finding financing and developing a speculative office project in this market are unlikely. Both recent local trends and national trends are working against office use.

Key Findings

- **Office inventory growth is strong.** Webster has increased inventory steadily over the last 15 years, with a few exceptional 2- to 3-year periods of stagnation where no additions occurred. Annual inventory additions averaged 8,000 square feet over the 15-year period.
- **Office vacancy is low with an extremely tight market, but a reversal may be here.** The Town of Webster's office market had just 3.7% vacancy in 2007 and has become even tighter over time, with vacancy dropping to 1.0% into 2021. However, a new delivery combined with additional vacancies caused the rate to spike in 2022 to 7.7%.
- **Office lease rates have caught up to the metro area.** In 2007 the going rate for office space in Webster averaged \$11.16 per square foot, which was almost \$5.00 lower than the Rochester MSA. This gap has become increasingly narrow over time. In 2022 the premium for space in Rochester was barely more than a dollar over Webster's rate (\$17.33 vs \$16.31 per square foot).
- **Net absorption dips dramatically in 2022.** Further evidence of an eroding office market is the Webster market's net absorption of -72,195 square feet this past year. This happened in the same year that the Rochester MSA was able to absorb 285,921 square feet of new office space. For Webster this runs contrary to a stable and positive recent history, with only a handful of years with negative absorption and average net absorption of +5,657.
- **Job growth for office-using sectors is projected to be negative to 2032.** The most likely types of economic activity to drive demand for office space in Webster are not expected to see gains over the next 10 years. These 43 industries are set to lose 151 jobs, a decrease of 5.5% from 2022 to 2032.
- **Regional trends in office users are better, at least for two key users.** The Rochester MSA has the same issue with projected office workers. It's slated to lose 2,815 such jobs over the next 10 years, a decline of 2.5%. However, there are two key areas where Rochester is set to expand, and they match the local trends in Webster. High-value consulting services are expected to grow and may drive the need for more office space. Management, Scientific, and Technical Consulting Services (+33% for Rochester, +34% for Webster)



and Architectural, Engineering, and Related Services (+12% for Rochester, +26% for Webster) are moving in the right direction to buoy the office market.

Regional Market Context

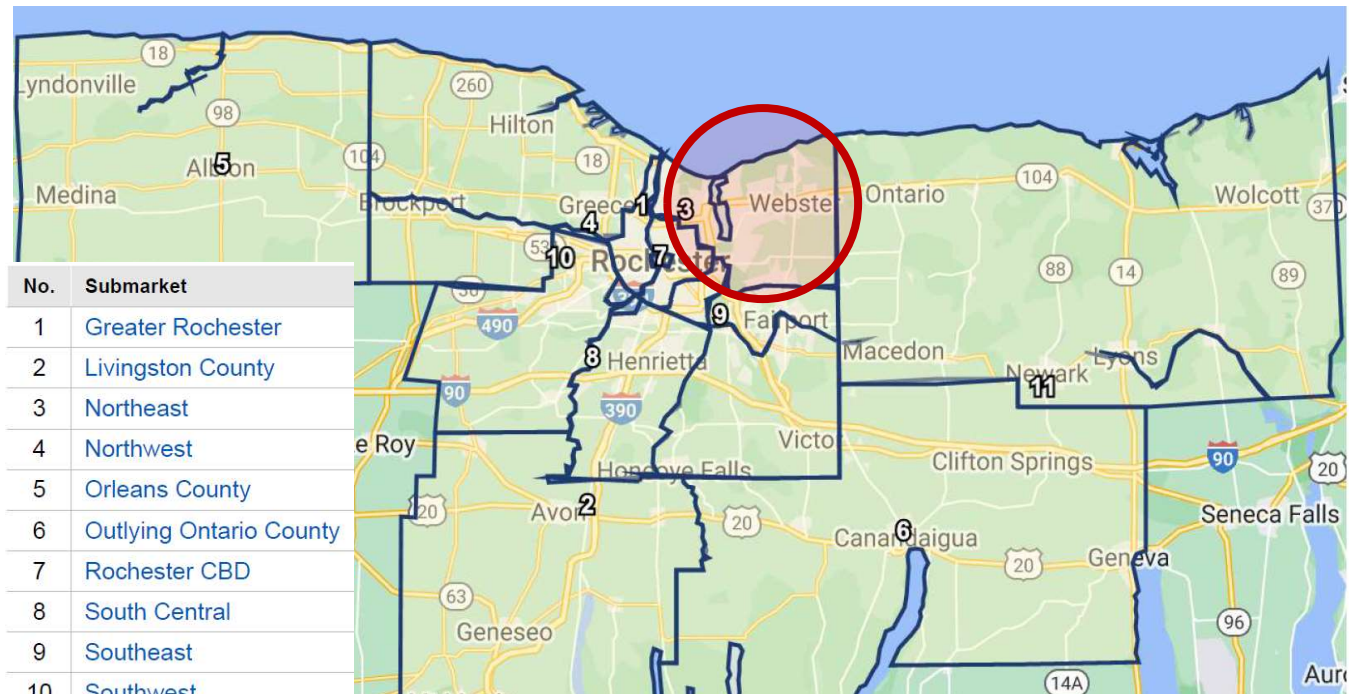
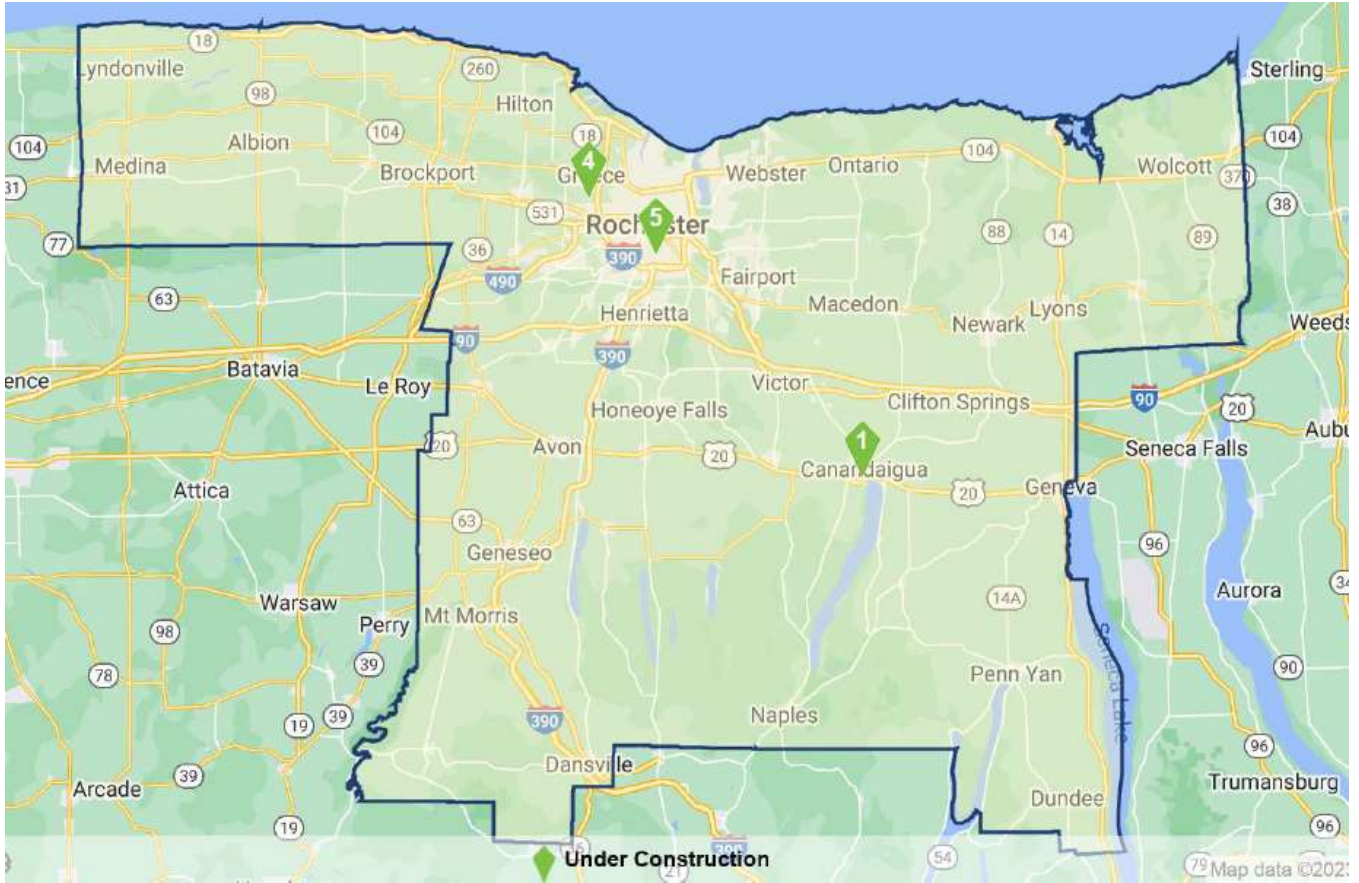
The Rochester MSA is the largest identified market for office property near the Webster BOA. There are modest signs of growth in the office market. The affordability of Rochester's office space compared to national averages for price per square foot may help it maintain steady demand in a tumultuous national market.

- Office rents in Rochester have seen gains of 1.3% over the past three years. This positive momentum has picked up in early 2023 with first-quarter annualized gains of 1.7%. This has occurred against a backdrop of 2.1% employment growth over the last 12-month period. While positive, this employment growth reflects the lowest growth rate since 2020.
- Rochester's office vacancy rate of 9.0% is up slightly from the 10-year average of 8.3%. This is after a period where vacancies came down almost a full percentage point in the last 12 months. The forecast is for the 12-month trend to reverse and vacancies to start climbing again.
- There are 120,000 square feet of new space currently under construction. These three projects with five buildings have only a modest amount of their space pre-leased (<10%). Once online, this increase in availability will represent a 0.2% increase in inventory.
- Rochester's vacancy rate compares favorably with the US. Vacancies have hovered just below 10% and remained approximately 200 basis points below the national average. The composition of vacancies is surprising. Where nationally the trend has been a flight to quality office space with worse-rated space taking a hit, in Rochester the 3-Star office market significantly outperformed the 4–5-Star market in terms of occupancy.
- Rents have grown at a slower rate since 2020. Overall office rents in Rochester and those for 3-Star space have tracked at 2% over the last year (up to just over \$20 per square foot). This is similar to the US. Office properties rated 4 to 5 Stars have done slightly better. But all segments are forecasted to decline.
- Sales of office properties ticked up noticeably in 2022. Sales volumes increased each quarter of the most recent year, peaking at nearly \$40 million in the fourth quarter. Besides one outlier, no quarter has seen this volume of office sales since 2018.
- The average market price for office space in the 12-month period is \$173 per square foot. Office in Rochester is priced at approximately half of the national market (just under \$340 per square foot). Rochester's average price was pushed up by an October sale of Geneseo Medical Campus properties that went for \$15.9 million and \$310 per square foot.
- Net absorption of office space in Rochester for 2022 was 285,921, which represents 0.5% of inventory. The top and middle of the market contributed positively to this absorption, with +328,779 square feet and +168,913 square feet for 4–5-Star and 3-Star office spaces respectively. 1–2-Star office spaces, however, had a negative absorption of -211,771.

Source: CoStar



Market Area



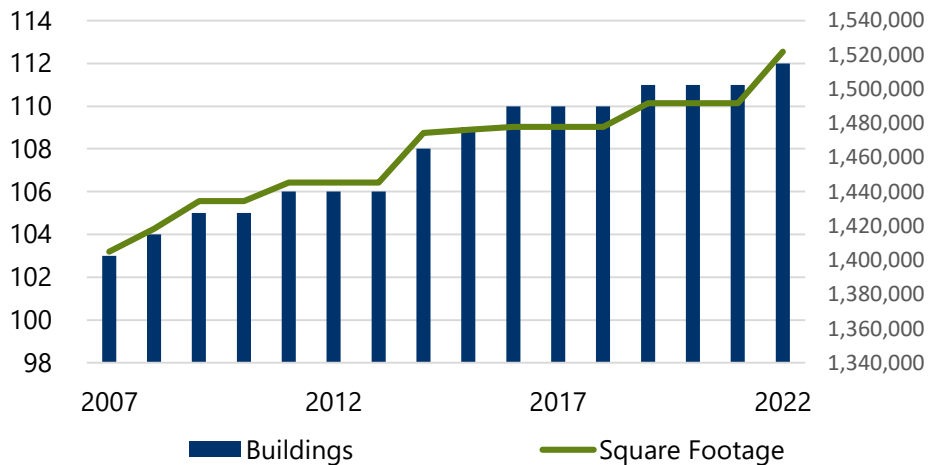
| No. | Submarket |
|-----|-------------------------|
| 1 | Greater Rochester |
| 2 | Livingston County |
| 3 | Northeast |
| 4 | Northwest |
| 5 | Orleans County |
| 6 | Outlying Ontario County |
| 7 | Rochester CBD |
| 8 | South Central |
| 9 | Southeast |
| 10 | Southwest |
| 11 | Wayne County |



Inventory

The Town of Webster had an inventory of 103 buildings and 1,404,866 square feet of leasable office space in 2007. In spite of a national recession, inventory increased through the late 2000s and early 2010s. Inventory reached 111 buildings and 1,491,743 square feet by 2019. Activity paused during the COVID-19 pandemic, but in 2022 another building added 30,000 square feet of inventory. Overall, the office market added nearly 8,000 square feet per year with nine buildings from 2007 to 2022. This is an increase of 8.3% for the Town of Webster’s office square footage, while the Rochester MSA increased inventory at a rate of 3.4% over the same period.

Office Inventory, Town of Webster



Source: CoStar

Occupancy and Vacancy

Office vacancy rates for the Town of Webster show a strong market throughout the period from 2007 to 2021. Starting at 3.7% in 2007, rates oscillated but dropped steadily and hovered under 1.0% in the period before the pandemic. The year 2020 shows rates starting to tick upwards and in 2022 rates rose swiftly to 7.7% vacancy. During the same time the Rochester MSA office market was moving in the opposite direction. Rochester MSA vacancy rates started already much higher than in the Town of Webster, more than double in 2007 at 7.9%. Rates rose through the next seven years to 8.7% in 2013, before easing again down below 6% in 2016. In the last five years vacancy rates for the Rochester MSA rose above 8% and stayed there, with vacancy in 2022 at 9.4%.

Office Vacancy Rates

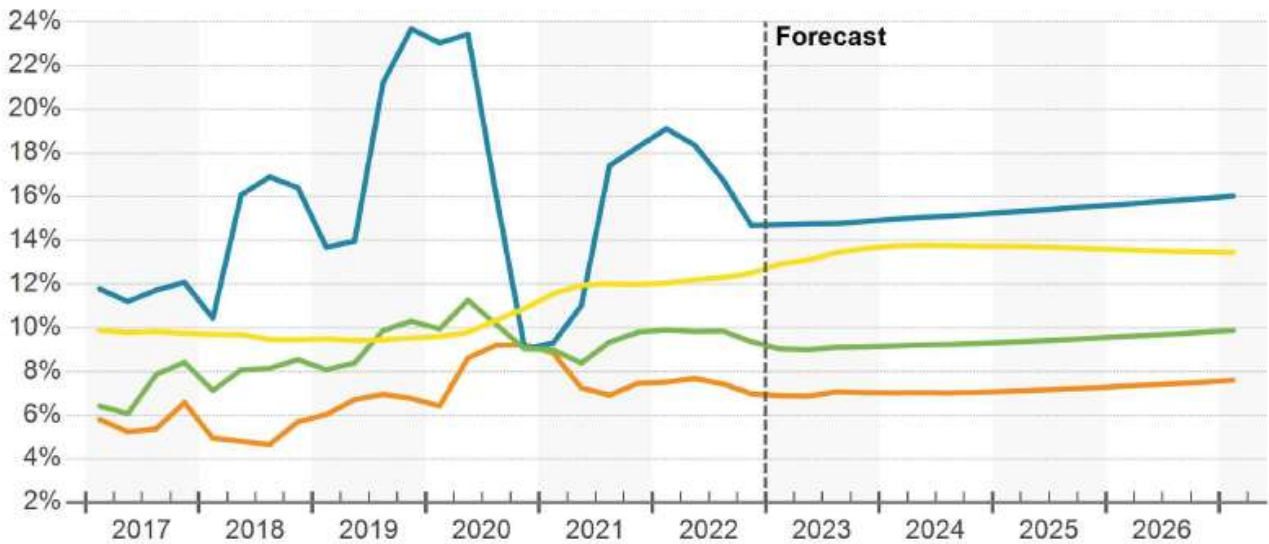
| Period | Webster | Rochester |
|--------|------------------------|-----------|
| | Vacant Percent % Total | |
| 2022 | 7.7% | 9.4% |
| 2021 | 1.0% | 9.8% |
| 2020 | 1.3% | 9.0% |
| 2019 | 0.9% | 10.3% |
| 2018 | 1.0% | 8.5% |
| 2017 | 0.7% | 8.4% |
| 2016 | 1.0% | 5.8% |
| 2015 | 1.8% | 6.2% |
| 2014 | 2.0% | 8.3% |
| 2013 | 1.3% | 8.7% |
| 2012 | 3.4% | 8.2% |
| 2011 | 3.0% | 8.4% |
| 2010 | 3.3% | 8.6% |
| 2009 | 3.5% | 7.5% |
| 2008 | 3.7% | 7.9% |
| 2007 | 3.7% | 7.9% |

Source: CoStar



Rochester Office Vacancy:

VACANCY RATE

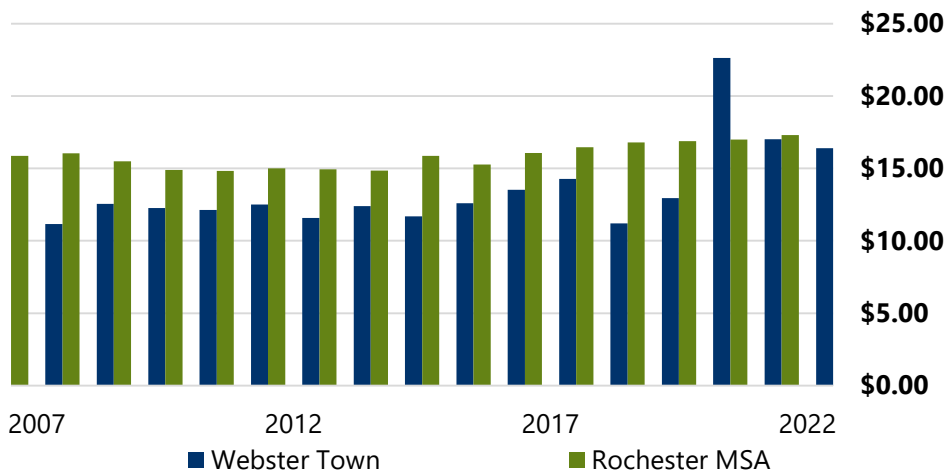


Source: CoStar
■ Rochester 3 Star ■ Rochester 4-5 Star ■ Rochester ■ United States

Lease Rates

Office leasing rates in the Town of Webster start well below the Rochester MSA market (\$11.16 per square foot vs \$15.86), but increases over the 15-year period have the two office markets almost level by 2022 (\$16.31 vs \$17.33). During this period Webster leasing rates increased by nearly half, growing 47%, while Rochester rates were relatively steady, going up only 9.1%.

Office Lease Rates

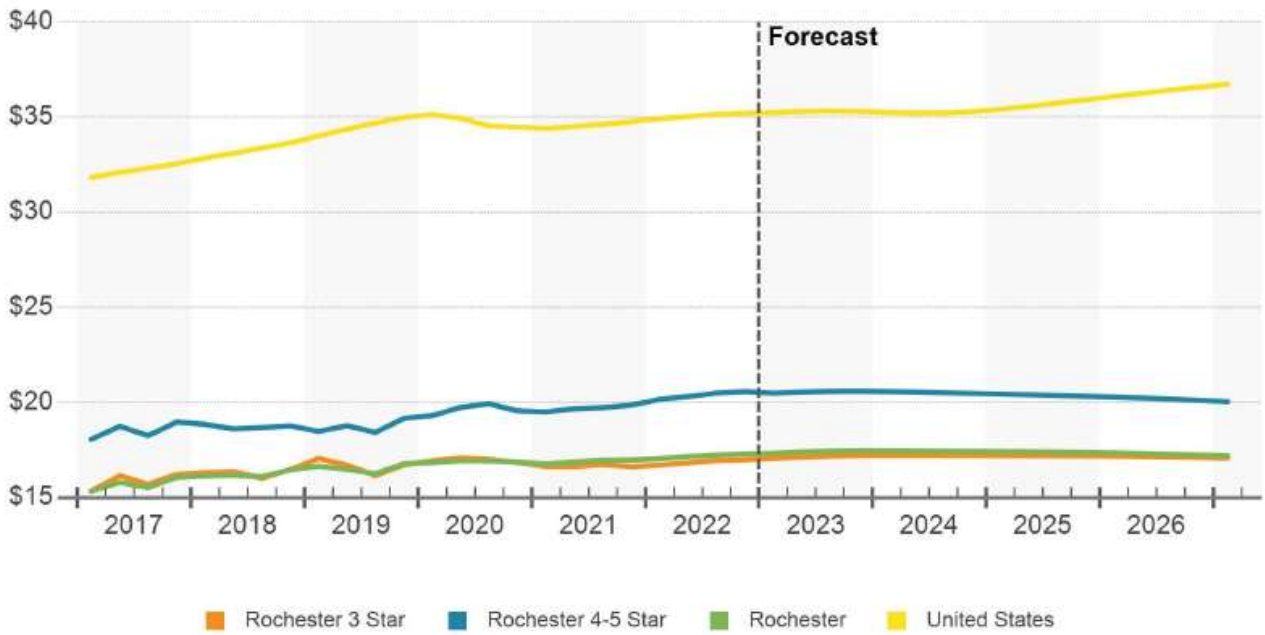


Source: CoStar



Rochester Office Lease Rates:

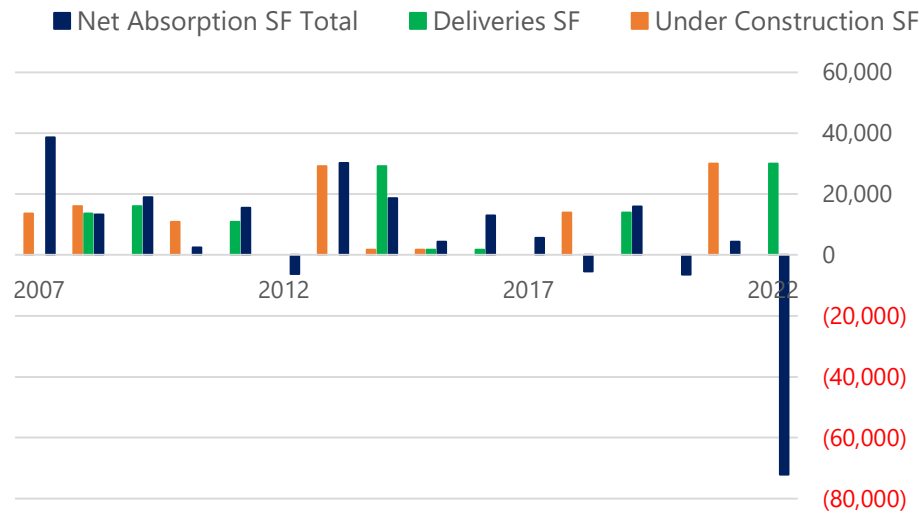
MARKET RENT PER SQUARE FEET



Deliveries and Absorption

Inventory data shows that the Town of Webster office market added buildings and leasable space consistently during the last 15 years. With only a handful of years where net-absorption was negative, the market demand was able to take in these new offerings through 2021. However, by 2021 the slowing, but still positive, net absorption indicated a market hitting its limit. The newly completed building in 2022, along with additional new space available, drove net absorption to the lowest point in our data, reaching -72,195 square feet in the latest year.

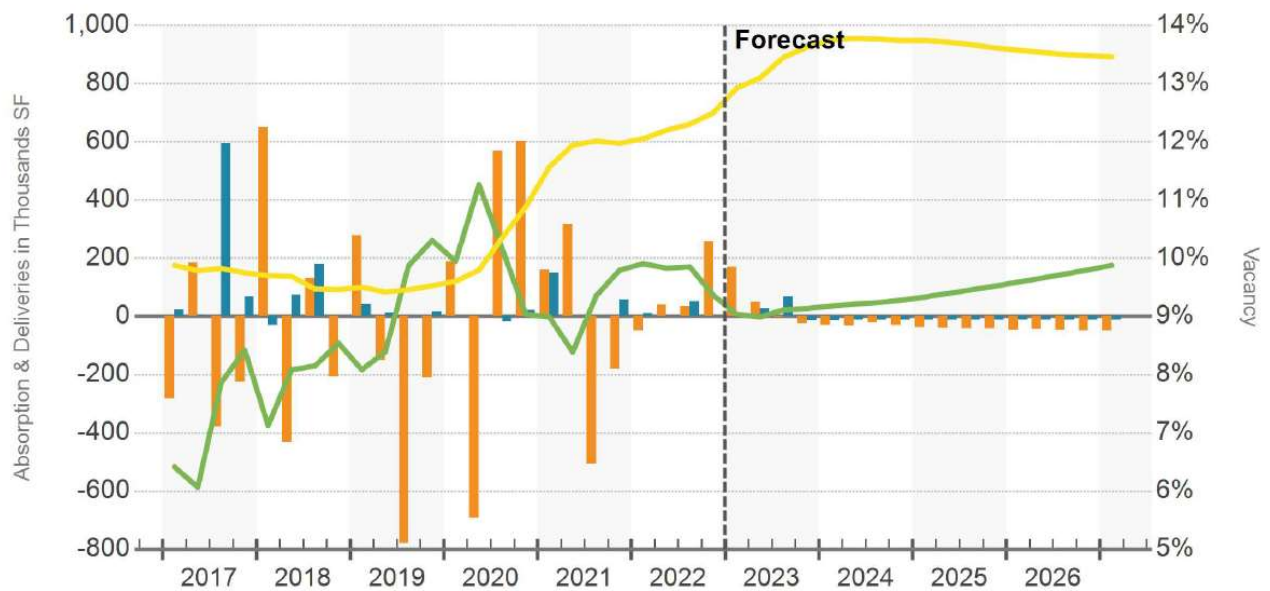
Industrial Market Metrics, Webster



Source: CoStar

Rochester Office

NET ABSORPTION, NET DELIVERIES & VACANCY



Source: CoStar



Industry Demand for Office Space

Future sources of demand for office space based on growth in office-using sectors show a negative outlook for the Town of Webster and the region. Over the next 10 years, from 2022 to 2032, the group of industries that are most likely to rent space are expected to shrink by 151 jobs. This is a 5.5% reduction to 2,602 from 2,753 in 2022.

The Rochester MSA area sees a similar but more modest decrease in expected jobs for these industries. It's expected to shed 2,815 jobs, which is a 2.5% reduction over the 10-year period. There are some significant industries for the Town of Webster that are expected to see large jobs gains in the metro area. Management, Scientific, and Technical Consulting Services is expected to add over 100 jobs per year (up 1,205 by 2032). The industry is expected to increase by over 30% in Webster as well. Architectural, Engineering, and Related Services has an expected increase of 617 jobs or 12% for Rochester. Finally, Insurance Carriers and Insurance and Employee Benefit Funds are expected to add nearly 500 jobs in the Rochester area over the next 10 years.

There are two areas of activity where both the metro area and Webster are projected for significant additions. Webster is also expected to grow the Architectural, Engineering, and Related Services industry, with an expected jobs increase of 76 or 25%. The other industry set to add more than 50 jobs in the next 10 years in Webster is Management, Scientific, and Technical Consulting Services, with 58 new jobs or 34%.



Key Sectors for Demand of Office Space, Jobs Change 2022 - 2032

| NAICS | Description | Webster Town | | | | Rochester MSA | |
|--------------|----------------------------------------------------------------------|--------------|--------------|--------------------------|----------------------------|--------------------------|----------------------------|
| | | 2022 Jobs | 2032 Jobs | Jobs Change, 2022 - 2032 | Jobs Change %, 2022 - 2032 | Jobs Change, 2022 - 2032 | Jobs Change %, 2022 - 2032 |
| 5112 | Software Publishers | 9 | 0 | -9 | -100% | 140 | 24% |
| 5121 | Motion Picture and Video Industries | 35 | 38 | 3 | 10% | 157 | 42% |
| 5122 | Sound Recording Industries | 1 | 3 | 2 | 162% | -2 | -15% |
| 5151 | Radio and Television Broadcasting | 16 | 9 | -7 | -43% | -26 | -4% |
| 5152 | Cable and Other Subscription Programming | 0 | 0 | 0 | 457% | 0 | -29% |
| 5173 | Wired and Wireless Telecommunications Carriers | 17 | 8 | -9 | -54% | -946 | -37% |
| 5179 | Other Telecommunications | 5 | 5 | 0 | -5% | -36 | -26% |
| 5191 | Other Information Services | 22 | 15 | -7 | -31% | 11 | 2% |
| 5211 | Monetary Authorities-Central Bank | 0 | 0 | 0 | - | 0 | - |
| 5221 | Depository Credit Intermediation | 12 | 13 | 1 | 5% | 269 | 6% |
| 5222 | Nondepository Credit Intermediation | 5 | 0 | -4 | -94% | -43 | -8% |
| 5223 | Activities Related to Credit Intermediation | 19 | 34 | 15 | 81% | 57 | 24% |
| 5231 | Securities and Commodity Contracts Intermediation and Brokerage | 5 | 6 | 1 | 18% | -74 | -13% |
| 5232 | Securities and Commodity Exchanges | 0 | 0 | 0 | - | 0 | - |
| 5239 | Other Financial Investment Activities | 4 | 6 | 1 | 32% | 261 | 21% |
| 5241 | Insurance Carriers | 261 | 268 | 7 | 3% | 409 | 9% |
| 5242 | Agencies, Brokerages, and Other Insurance Related Activities | 51 | 48 | -3 | -6% | -392 | -10% |
| 5251 | Insurance and Employee Benefit Funds | 0 | 0 | 0 | -57% | 83 | 108% |
| 5259 | Other Investment Pools and Funds | 0 | 0 | 0 | 73% | 2 | 34% |
| 5311 | Lessors of Real Estate | 236 | 185 | -51 | -22% | -91 | -3% |
| 5312 | Offices of Real Estate Agents and Brokers | 21 | 32 | 11 | 54% | 75 | 12% |
| 5313 | Activities Related to Real Estate | 62 | 79 | 17 | 28% | -20 | -1% |
| 5331 | Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) | 0 | 0 | 0 | 9% | -2 | -82% |
| 5411 | Legal Services | 51 | 48 | -3 | -6% | 173 | 5% |
| 5412 | Accounting, Tax Preparation, Bookkeeping, and Payroll Services | 287 | 121 | -166 | -58% | -812 | -25% |
| 5413 | Architectural, Engineering, and Related Services | 296 | 372 | 76 | 26% | 617 | 12% |
| 5414 | Specialized Design Services | 9 | 11 | 2 | 19% | -41 | -9% |
| 5415 | Computer Systems Design and Related Services | 144 | 163 | 19 | 13% | 236 | 4% |
| 5416 | Management, Scientific, and Technical Consulting Services | 171 | 230 | 58 | 34% | 1,205 | 33% |
| 5418 | Advertising, Public Relations, and Related Services | 52 | 74 | 22 | 41% | 170 | 15% |
| 5511 | Management of Companies and Enterprises | 293 | 302 | 9 | 3% | -269 | -3% |
| 5611 | Office Administrative Services | 34 | 38 | 4 | 11% | 88 | 11% |
| 5613 | Employment Services | 470 | 360 | -109 | -23% | -1,363 | -14% |
| 5614 | Business Support Services | 18 | 13 | -5 | -27% | -773 | -39% |
| 5615 | Travel Arrangement and Reservation Services | 3 | 2 | -1 | -35% | -46 | -27% |
| 8131 | Religious Organizations | 38 | 40 | 2 | 4% | -70 | -2% |
| 8132 | Grantmaking and Giving Services | 1 | 1 | -1 | -49% | -20 | -7% |
| 8133 | Social Advocacy Organizations | 0 | 0 | 0 | -79% | -152 | -34% |
| 8134 | Civic and Social Organizations | 2 | 0 | -2 | -99% | -203 | -26% |
| 8139 | Business, Professional, Labor, Political, and Similar Organizations | 0 | 0 | 0 | -83% | -18 | -3% |
| 9011 | Federal Government, Civilian | 4 | 6 | 2 | 50% | -227 | -5% |
| 9029 | State Government, Excluding Education and Hospitals | 2 | 4 | 1 | 64% | -932 | -14% |
| 9039 | Local Government, Excluding Education and Hospitals | 96 | 71 | -25 | -26% | -211 | -1% |
| Total | | 2,753 | 2,602 | -151 | -5.5% | -2,815 | -2.5% |

Source: Lightcast



Medical Office

Medical office is a unique type of office space that is considered separately from traditional commercial office space. As shown in the tables below, certain health care sectors that utilize medical office space are expected to grow over the next decade, including dentists, outpatient care centers, and other health care providers. The BOA may be able to capture some of this demand, although market demand may be dependent on other new uses. For example, senior housing would enhance the market feasibility of new medical office space within the BOA.

Projected Medical Office Demand: Rochester MSA

| NAICS | Description | 2022 Jobs | 2032 Jobs | 2022 - 2032 Change | 2022 - 2032 % Change |
|-------|---------------------------------------|-----------|-----------|--------------------|----------------------|
| 6212 | Offices of Dentists | 3,191 | 3,633 | 442 | 14% |
| 6243 | Vocational Rehabilitation Services | 1,829 | 2,227 | 398 | 22% |
| 6213 | Offices of Other Health Practitioners | 2,216 | 2,612 | 396 | 18% |
| 6214 | Outpatient Care Centers | 1,993 | 2,281 | 288 | 14% |
| 6219 | Other Ambulatory Health Care Services | 1,302 | 1,066 | (236) | (18%) |
| 6215 | Medical and Diagnostic Laboratories | 816 | 506 | (310) | (38%) |
| 6211 | Offices of Physicians | 4,519 | 3,776 | (743) | (16%) |

Source: Lightcast

Projected Medical Office Demand: Monroe County

| NAICS | Description | 2022 Jobs | 2032 Jobs | 2022 - 2032 Change | 2022 - 2032 % Change |
|-------|---------------------------------------|-----------|-----------|--------------------|----------------------|
| 6213 | Offices of Other Health Practitioners | 1,709 | 2,061 | 352 | 21% |
| 6212 | Offices of Dentists | 2,450 | 2,755 | 305 | 12% |
| 6243 | Vocational Rehabilitation Services | 1,110 | 1,312 | 202 | 18% |
| 6214 | Outpatient Care Centers | 1,359 | 1,375 | 16 | 1% |
| 6219 | Other Ambulatory Health Care Services | 1,017 | 734 | (283) | (28%) |
| 6215 | Medical and Diagnostic Laboratories | 796 | 479 | (316) | (40%) |
| 6211 | Offices of Physicians | 3,711 | 3,305 | (405) | (11%) |

Source: Lightcast



8. HOSPITALITY MARKET ANALYSIS

Hospitality Market Opportunities

Hospitality indicators for Rochester show a market that is starting to regain its strength after the pandemic. This region's hotels were hit harder by the downturn in travel than the national average (in terms of occupancy and RevPAR-Revenue Par Available Room.) Even recovery metrics lag the US, though new deliveries are significant and indicate optimism about the long-term prospects for the metro area.

The Town of Webster's local market has significant inventory, but hasn't added new rooms in over a decade. There are a number of regional travel destinations within a day-trip of the site, but it is not a marquee leisure market with national reach.

- **Budget:** The site is bracketed with options to the east (Budget Inn) and the west (Relax Inn) within a five-mile radius. It may be that increasing the options directly adjacent to the Webster Village area could fill a hole in the market, but the demographics of the area have been moving in the opposite direction.
- **Midscale:** There aren't currently any midscale hotel locations in the Town of Webster or adjacent communities. If leisure travel sentiments continue to improve for the area and a developer wanted to target price points between the current offerings, this is the most likely choice.
- **Upper Midscale:** This market is saturated with three hotels all within a mile of each other and within three miles to the west of the site.
- **Upper Upscale & Luxury:** Although the area has higher income demographics than the Rochester metro area, it's unlikely to be a market that these types of luxury hotels are willing to engage in. However, this could be an opportunity for a similarly priced boutique hotel. The location near the Village and proximity to destinations and natural amenities could make it an attractive site.

Key Findings

- **There are no new hotels in the Town of Webster since 2008.** The area did enjoy a local boom in hospitality inventory that saw its number of rooms jump from 283 in 2007 to 351 in 2012, a 92% increase. This growth was an isolated market moment with no new deliveries since then, while a couple of buildings have closed.
- **In spite of the static supply, occupancy is lower than in the Rochester MSA and has not reached pre-pandemic levels.** The occupancy rate for the Town of Webster in March 2023 is 58.8%. This is below the national average (65.3%), the surrounding Rochester MSA area (60.4%), and the Town's pre-pandemic rate (62.7%).
- **Rates have bounced back even stronger.** The average daily rate (ADR) for the Town of Webster during the depths of the pandemic was \$87.35. In the last 24 months this rate has increased dramatically, up 50% over the period to \$127.86. The ADR for Webster is above that of Rochester, but the gap is narrowing.



Inventory

The character of the Town of Webster hospitality sector changed significantly between 2007 and 2012 when two new buildings came online and the number of rooms in the market nearly doubled. In 2015 one of the hotel properties shuttered. For a market of this size, even a single building closing its doors has a large impact on the size of the inventory. While the Town of Webster hasn't seen growth since its last delivery in 2008, it also hasn't lost inventory since 2015. Critically, all of its hotels survived the pandemic and are still operating. There are three Upper Midscale hotels within three miles of the Webster BOA: the Fairfield Inn and Suites Rochester East, the Hampton Inn Rochester-Webster, and the Holiday Inn Express & Suites Rochester Webster, all of which have price points starting between \$100 and \$125 per room.

The Rochester MSA has approximately 30 times the number of rooms as the Town of Webster and includes major submarkets with its downtown, the Finger Lakes region, and a number of smaller markets throughout the metro area. It has seen organic growth in buildings and the number of rooms of between 5% to 10% per five-year period from 2007 to 2019. Three buildings closed during the pandemic, taking over 500 rooms off the market. In the last year more than half of those lost rooms have been recovered.

Hospitality Inventory, Key Metrics

| Year | Webster | | Rochester MSA | |
|------------------|---------|-----------------|---------------|-----------------|
| | Number | 5-Year % Change | Number | 5-Year % Change |
| Buildings | | | | |
| 2007 | 5 | | 109 | |
| 2012 | 7 | 33% | 120 | 10% |
| 2017 | 6 | -14% | 127 | 6% |
| 2022 | 6 | 0% | 124 | -2% |
| Rooms | | | | |
| 2007 | 183 | | 8,576 | |
| 2012 | 351 | 92% | 9,408 | 10% |
| 2017 | 335 | -5% | 9,938 | 6% |
| 2022 | 335 | 0% | 9,550 | -4% |

Source: CoStar

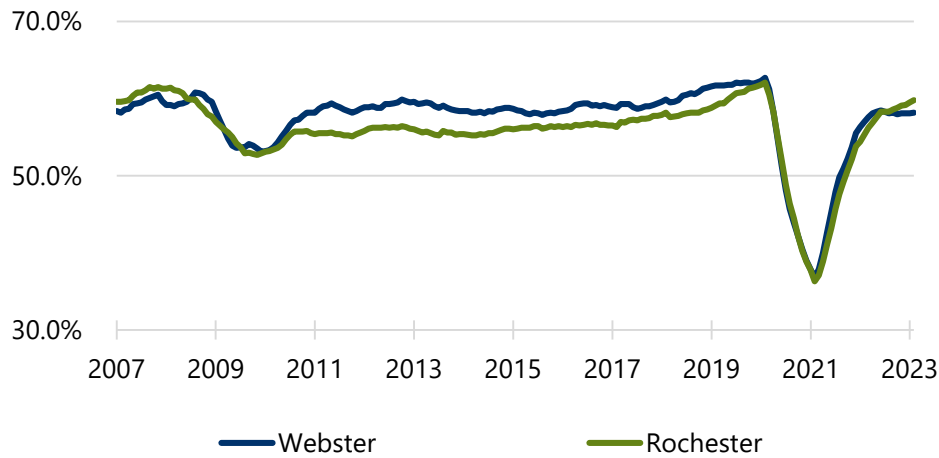


Occupancy

CoStar hotel occupancy is calculated on a monthly basis and takes the number of occupied rooms in the period and divides by the total number of rooms. A high occupancy rate is generally considered to be a positive sign for hoteliers, as it indicates strong demand for their rooms and the potential for higher room rates. Conversely, a low occupancy rate may indicate that business or leisure travelers are no longer visiting the region in the same numbers or that there is excess supply in the market from increased inventory.

The Rochester market has lower occupancy rates than the national average. Healthy hospitality markets will have occupancy rates above 65% and sometimes even up around 80%. The occupancy for the Town of Webster in early 2023 is just over 58%. The occupancy rate has not recovered to pre-pandemic levels. In the past the Town of Webster enjoyed a consistently higher occupancy rate than the Rochester MSA market as a whole. However, that margin has not returned since the pandemic. Where the metro area has seen strong recovery of occupancy rates in 2022 (up to 60% from 54%), the Town of Webster hotels have not experienced the same rise.

Hospitality Occupancy Rates



Source: CoStar



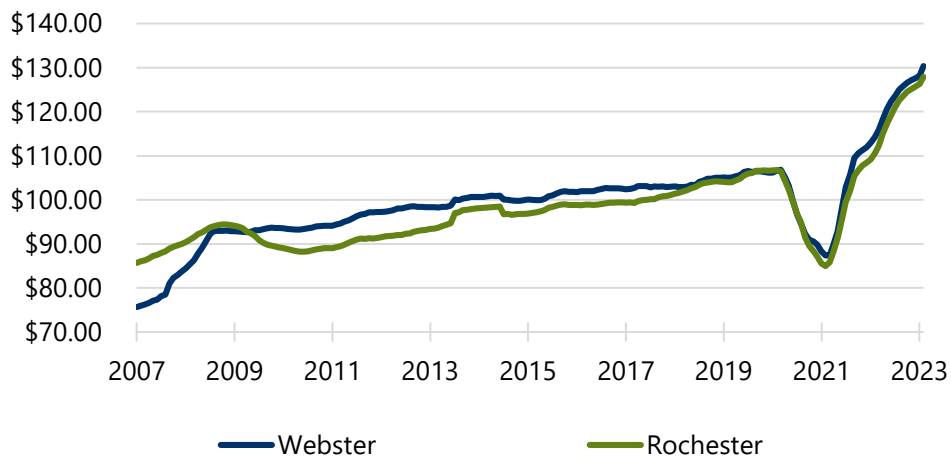
Average Daily Rate (ADR)

A hotel or market's Average Daily Rate (ADR) is the measure of the average rate paid per room that's occupied at the property. Ultimately, it's a metric that helps identify room rates from a day-to-day perspective. ADR is calculated to understand a hotel's profits and performance. It includes only the rooms sold.

The Town of Webster's ADR has been increasing steadily since the spring of 2021. The pandemic drove ADR to a 10-year low of \$87.35 in March 2021. Soon afterwards vaccines became widely available, many regions that still had travel restrictions removed them, and travel markets, especially leisure travel, took off. In the next two years ADR would increase by nearly 50% to \$130.33.

While the Rochester market typically has a slightly lower ADR than the Town of Webster, the movements up and down of these two markets are very similar. Rochester also saw a 50% increase in ADR during the last two years, reaching \$127.86 in March of 2023.

Hospitality Average Daily Rate



Source: CoStar



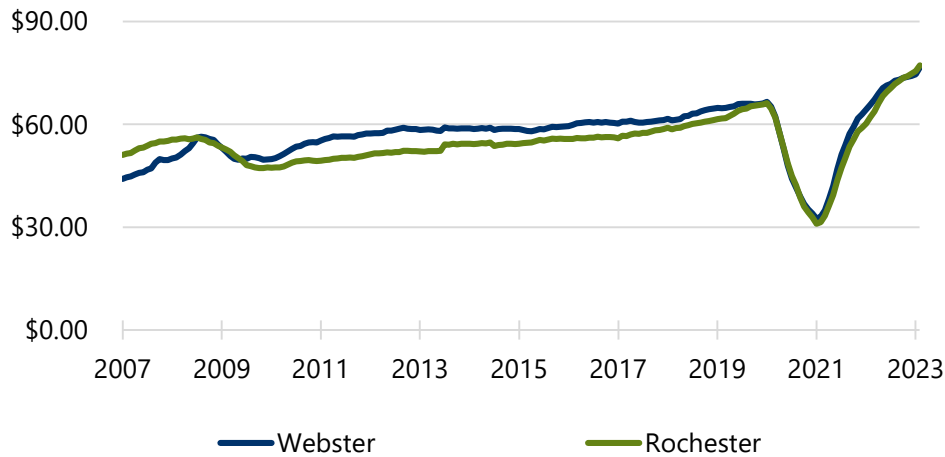
Revenue Per Available Room (RevPAR)

The metric Revenue Per Available Room (RevPAR) is the total guest room revenue divided by the total number of available rooms. RevPAR differs from ADR because RevPAR is affected by the amount of unoccupied available rooms, whereas ADR shows only the average rate of rooms actually sold. Whereas ADR focuses on profits and room price, RevPAR is a snapshot of revenue generation by inventory. Another way to consider the concept of RevPAR is:

$$\text{Occupancy} \times \text{ADR} = \text{RevPAR}$$

The RevPAR for the Town of Webster has moved similarly to ADR in terms of the toll that the pandemic took on it and the rapid recovery starting in 2021 when people began to travel again. RevPAR for the town was \$76.66 in March of 2023, a 131% increase over the two years since March 2021. Like ADR, RevPAR has more than recovered compared to pre-pandemic levels. Similar to ADR, where the Town of Webster used to enjoy a slightly higher trend compared to the surrounding area, now the Rochester MSA's RevPAR is at almost the exact same level.

Hospitality Revenue Per Available Room



Source: CoStar

Demand and Market Potential

Overall, the BOA is not expected to have any significant market potential for a hotel or lodging use in the foreseeable future. While the BOA has relatively easy access to Route 104, visibility from the highway is limited and more attractive locations are available for lodging uses. Additionally, hotel market metrics do not suggest that conditions are favorable for a new establishment in the Webster area. However, it should be noted that market potential could be enhanced if new visitor-generating uses were included as part of the revitalization of the BOA.

- Leisure travel:** The regional travel market near the Town of Webster is a critical part of the local economy. The local market has a bounty of natural and park amenities like Webster Arboretum, North Ponds Park, Webster Park, Genesee Valley Greenway, and sites near the Lake Ontario shoreline. The Village of Webster's downtown is a tourist destination for shopping and eating. The regional market features Rochester's diverse set of museums, tours of nearby wineries, and draws for family activity like the Seabreeze Amusement Park and Webster Aquatic Center.
- Business travel:** With the reduced operations at Xerox's facility and projected declines in Webster and regionally for business employment, this is unlikely to be a growing source of demand for hotel rooms.



9. INDUSTRIAL MARKET ANALYSIS

Industrial Market Opportunities

The Rochester metro area market reflects strong national tailwinds for industrial space: increasing demand is up against low inventory, causing lease rates to rise. Sales volumes of industrial space in Rochester are the highest in five years as investors seek to capitalize on a tight market. Additionally, there is only one project currently under construction in the entire region and the trend for deliveries has been negative since peak activity in 2017.

The Town of Webster has similarly low trends in deliveries and inventory. However, the lack of construction seems more grounded in the local market as vacancy (even beyond Xerox) is increasing and lease rates are down. The site's previous use is industrial, which could make one of these scenarios more likely. What are the specific industrial opportunities?

- **Logistics:** This is the industrial submarket that has the most pressure in terms of national and regional demand. There are several factors working against this for Webster. The Town is located at the periphery of the metro area and highway network. Logistics and warehousing operations tend to look for "hub" locations, and Webster's medium-scale retail cluster isn't sufficient to be its own source of demand.
- **Flex:** Compared to Rochester, Webster has a modest and stagnant flex market. There is potential for users who would benefit from proximity to Xerox and are looking for a combination of manufacturing and operational space. Data centers may be an option, and they would have the utility infrastructure to support them. However, these would be difficult projects to build on spec, and there is no recent evidence in the current market to support them as a feasible option.
- **Specialized:** This is the second largest submarket in the Rochester area (three-times the size of the Flex market). This market also has the lowest vacancy and availability of industrial submarkets in the Rochester area, which indicates strong demand. There is a cluster of industrial space a couple miles east along Basket Road that could be a template for redevelopment of this site. It may also be a source of overflow demand and prospective tenants.

Key Findings

At a time when trends for national and regional (Rochester MSA) industrial markets have been expanding quickly, the Greater Webster submarket area has seen declines in buildings and square footage of inventory.

- **Webster's industrial market is moving in the opposite direction**, the wrong direction, compared to regional and national trends. Most key market indicators for industrial real estate in Webster point towards a location that is stagnating or declining. These trends in buildings (-2% in 10 years), vacancy (+7% in 10 years), and leasing rates (-20% in 10 years) contrast to the growth and appreciation in the industrial real estate markets for the Rochester MSA and the US more broadly.
- **Inventory for industrial space in the Town of Webster has been declining for over a decade.** Starting in 2013, the trend for available industrial space in the area has been decreasing. The last new buildings to be added to the market occurred just before the last recession nearly 15 years ago. The peak of nearly 5.58



million square feet reached in 2010 has seen two properties taken off the market with no new additions, leaving the 2023 inventory at 5,569,214 square feet.

- **Vacancy for the Town of Webster industrial properties has been spiking in recent years.** While it has recovered partially from the downturn during the pandemic, vacancy rates stand at 10.8%, compared with a pre-pandemic trend where vacancy was routinely around 3% or lower. Currently the vacancy for industrial space in the Rochester MSA is less than half that of Webster.
- **Lease rates are down continuously over time.** Besides a small bounce in 2022, lease rate data tells a story of a declining market. Rates are down 42% since their peak in 2007, from \$7.88 to \$4.59. This decline has happened without significant additions of available space that would drive up supply and at the same time as industrial rates are going up in most other markets.
- **Net absorption has been stagnant for long periods and then erratic as Xerox repositions its campus properties.** The last time a new building was constructed in Webster was 2009. Along with one other delivery the previous year, the industrial market has not seen any positive change in supply. At the same time, net absorption has been up and down with a low overall average volume of just under 30,000 square feet of industrial space absorbed per year. In recent years Xerox has started to implement changes to its Webster campus, with large amounts of space becoming available and only half of it being absorbed by the market.
- **Job growth in key sectors is unlikely to be a key driver of future demand.** The typical end users of industrial space have a mixed outlook in terms of job growth through 2032. There are some sectors, like Warehousing and Storage, that are being driven by national trends in growth and are also expected to see more jobs in Webster (up 28.9%). However, industrial users as a whole are expected to decline over the next 10 years, down 1.7% compared to a jump in similar sectors for the region (Rochester MSA jobs up 4.2%).



Regional Market Context

The Rochester MSA is the largest identified market for industrial property near the Webster BOA. It's one of the larger industrial markets in upstate New York and has seen significant growth in inventory, sales, and rents. These positive market signals come at a time when the national market for industrial space is also expanding.

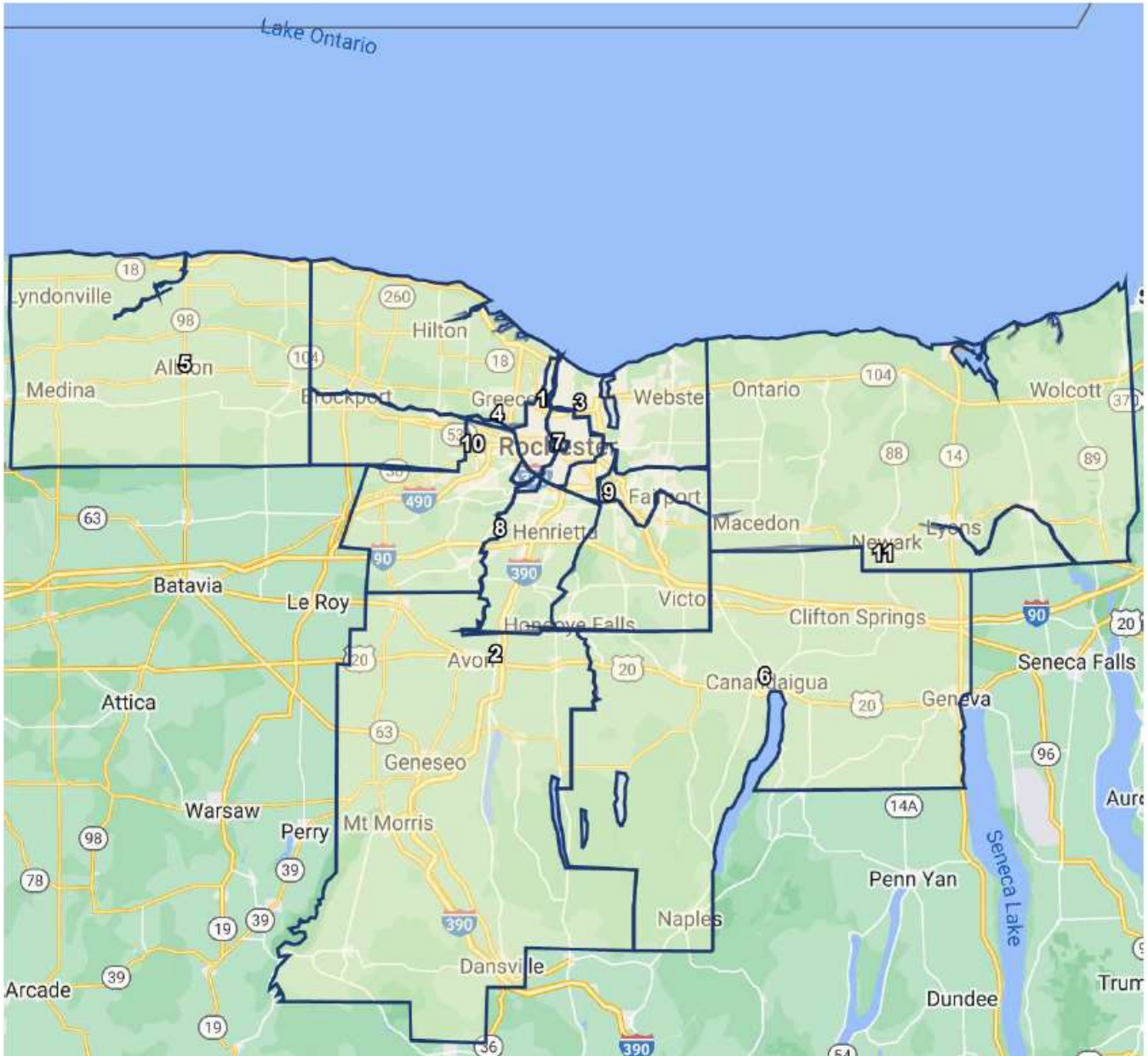
- **Industrial rents in Rochester have seen gains** of 7.2% over the past three years. This positive momentum has picked up in early 2023 with first-quarter annualized gains of 8.4%. However, metro area gains have been outperformed by strong fundamentals at the national level, where rents have grown 6.2% per year over the last 10 years, compared with only 4.2% annually in Rochester.
- **The last 12 months have been the peak sales period of the last five years.** The Rochester MSA had 103 sales in the last 12 months. These sales amounted to \$145 million in property value transacted. The majority of this volume was in the Logistics facilities submarket, whose \$83 million in sales represents 57% of the total.
- **The largest sale in the 12-month period was at 328 Silver Hill Road**, where the 150,000-square-foot building, which was constructed in only 2020, sold for \$21.8 million or \$145 per square foot. This sale was an outlier in terms of price per square foot, being the highest rate of all sales by over \$25 per square foot. Only a handful of other sales reached above \$100 per square foot.
- **The Rochester market for industrial space is highly competitive in terms of price compared to the rest of the country.** The average price for the 12-month period is \$70 per square foot. This is up 10% year-over-year, but is still around half of the average asking price in the rest of the US.
- **The cap rates for industrial have rebounded since a choppy period during the pandemic.** They're now sitting right around 7.5%, which is substantially higher than the national rate of 6.0%. This difference in risk is consistent over time, with the Rochester market keeping roughly 150 basis points higher than the US over the last five years.
- **Key predictors of demand for space, like employment, are trending down.** While the unemployment rate for Rochester has stabilized below pre-pandemic levels, this is driven in part by lower labor participation as the metro area has not reached previous job levels. The current trend for key industrial sectors (manufacturing and trade/warehousing) in the Rochester market show negative jobs growth. This is consistent with the 10-year trend as well as the 5-year forecast.



Market Area

Town of Webster is identified in the map below as included in the submarket #3. This submarket also includes eastern parts of Irondequoit and towns south of Webster. This market is compared to industrial metrics for the larger Rochester MSA market area. The Rochester MSA is the outlined area including all submarkets below.

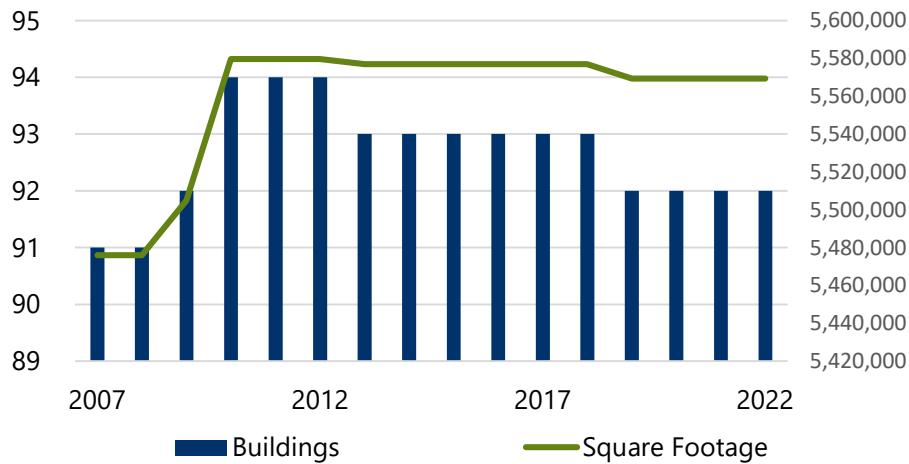
ROCHESTER SUBMARKETS



Inventory

Starting in 2009 Town of Webster’s industrial inventory began a small ramp up with increases in the number of buildings and the total square footage of industrial space. It hit a peak of 5,579,574 in 2010, but then buildings started coming offline between 2013 and 2019. These reductions are a small part of the overall Town of Webster market and the current inventory is down less than 1% from its peak level last decade.

Industrial Inventory, Webster Town



Source: CoStar

Occupancy and Vacancy

The Town of Webster and Rochester MSA industrial markets are moving in opposite directions in terms of vacancy rates. Town of Webster’s vacancy rate, which had been steadily decreasing since after the Great Recession has now risen rapidly due to the shut down of operations at the Xerox campus. These high rates have stabilized slightly in 2022 as the economy reopens.

Rochester MSA’s industrial vacancy has been moving in a healthy range between 4% and 7% since 2015. This downward pressure on vacancy has continued as Rochester has slowly increased its inventory. The metro area has added just over 3% to industrial square footage in the last 15 years and the market has continued to tighten.

Industrial Vacancy Rates

| Period | Webster | Rochester |
|-----------------|----------------|-----------|
| | Vacant Percent | % Total |
| 2023 YTD | 10.9% | 5.3% |
| 2022 | 10.8% | 4.8% |
| 2021 | 22.3% | 5.3% |
| 2020 | 23.4% | 5.4% |
| 2019 | 0.5% | 5.1% |
| 2018 | 1.0% | 4.3% |
| 2017 | 2.4% | 5.2% |
| 2016 | 2.7% | 6.3% |
| 2015 | 3.4% | 7.1% |
| 2014 | 3.2% | 8.8% |
| 2013 | 3.2% | 8.8% |
| 2012 | 3.7% | 9.3% |
| 2011 | 5.4% | 10.4% |
| 2010 | 3.7% | 11.3% |
| 2009 | 4.6% | 10.5% |
| 2008 | 2.1% | 10.1% |
| 2007 | 5.8% | 8.3% |

Source: CoStar



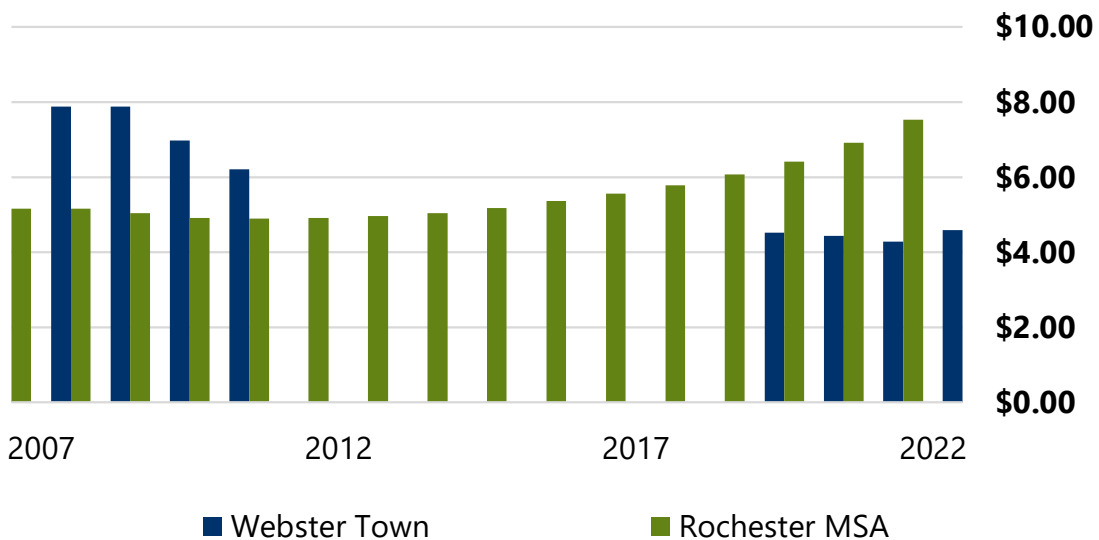
Lease Rates

Leasing rates for industrial property are one indicator that relates to the intensity of demand for space in a market. CoStar data for Town of Webster goes back to 2007 but has missing rates for a relatively stable part of the post-recession and pre-COVID period.

For data that is available, the trend in leasing rates for industrial space in Town of Webster is negative except for a small bounce in 2022. The rate for space peaks in the beginning at \$7.88 per square foot in 2007. It starts to drop before the data blackout and this descent continues from 2019 (\$4.52/sf) through 2021 (\$4.59/sf).

The market for industrial space is moving in the exact opposite direction for the Rochester MSA. The market experiences a brief lull as prices dip from \$5.17 per square foot in 2007 to \$4.90 per square foot in 2011. However, as the metro area climbs out of the recession demand picks up and lease rates surge even through the pandemic to peak in the most recent year with 2022 rates at \$7.53 per square foot.

Industrial Lease Rates



Source: CoStar

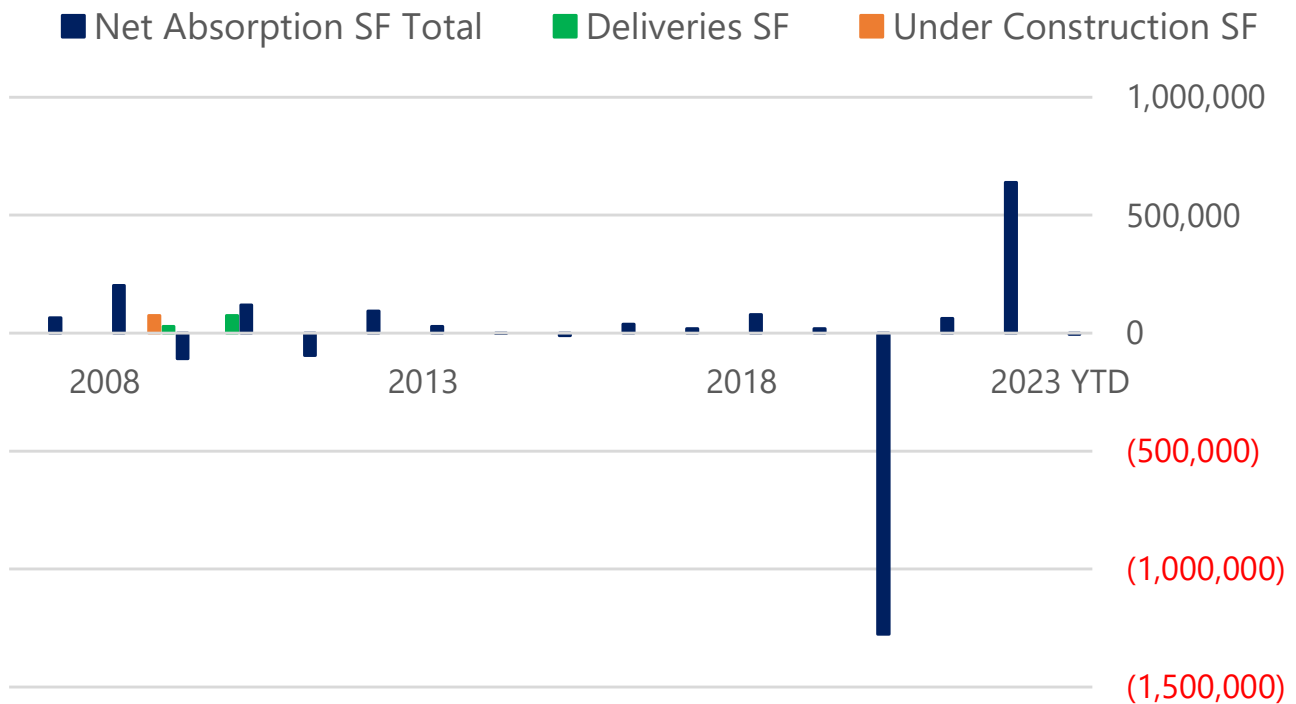


Deliveries and Absorption

New industrial buildings in the Town of Webster have been scarce in recent years. The last new delivery of space occurred in 2010 when a new building added almost 75,000 square feet of industrial inventory. This came on the heels of another delivery the previous year of 28,911. Since that time there have been zero new deliveries of industrial space in the Town of Webster. On the other hand, inventory has begun to decline slightly.

Absorption has been highly variable over the last fifteen years with large swings in recent years as the Xerox campus has been vacated and (at least partially) re-tenanted. This took the form of net negative absorption of -1,277,251 square feet in 2020 and then positive net absorption of 702,253 square feet in the following two years. These swings took place after up and down years following the 2009 recession where the market absorption between 2010 and 2019 averaged 28,737 square feet per year over the ten-year period.

Industrial Market Metrics, Webster



Industry Demand

There are well-established industry groups that typically occupy industrial space. When these types of activities are adding jobs, firms are likely to be looking for additional space which will increase demand. The table below lists the projected job growth between 2022 and 2032 for users of industrial space in the Rochester MSA. Key drivers of future demand are anticipated to include computer and electronic product manufacturers, warehousing and storage (distribution) facilities, and food and beverage manufacturers. The following tables show projected growth by high level industry sector as well as for more detailed industry subsectors.

Industries with Greatest Projected Growth - Rochester MSA

| NAICS | Description | 2022 Jobs | 2032 Jobs | 2022 - 2032 Change | 2022 - 2032 % Change |
|-------|-----------------------------------------------|--------------|--------------|--------------------------|-------------------------|
| 334 | Computer and Electronic Product Manufacturing | 10,024 | 11,433 | 1,409 | 14% |
| 493 | Warehousing and Storage | 3,102 | 3,908 | 805 | 26% |
| 485 | Transit and Ground Passenger Transportation | 2,475 | 3,166 | 691 | 28% |
| 311 | Food Manufacturing | 5,868 | 6,489 | 621 | 11% |
| 492 | Couriers and Messengers | 2,708 | 3,245 | 537 | 20% |
| 484 | Truck Transportation | 2,952 | 3,244 | 292 | 10% |
| 312 | Beverage and Tobacco Product Manufacturing | 2,143 | 2,409 | 266 | 12% |
| 326 | Plastics and Rubber Products Manufacturing | 5,458 | 5,692 | 235 | 4% |
| 313 | Textile Mills | 142 | 199 | 57 | 40% |
| 337 | Furniture and Related Product Manufacturing | 680 | 735 | 55 | 8% |
| 488 | Support Activities for Transportation | 763 | 809 | 47 | 6% |
| 483 | Water Transportation | 62 | 103 | 41 | 66% |
| 321 | Wood Product Manufacturing | 428 | 465 | 37 | 9% |
| 486 | Pipeline Transportation | 45 | 57 | 12 | 27% |

Source: Lightcast

Industry Subsectors with Greatest Projected Growth - Rochester MSA

| NAICS | Description | 2022 Jobs | 2032 Jobs | 2022 - 2032 Change | 2022 - 2032 % Change |
|-------|--------------------------------------------------------|--------------|--------------|--------------------------|-------------------------|
| 4931 | Warehousing and Storage | 3,102 | 3,908 | 805 | 26% |
| | Semiconductor and Other Electronic Component | | | | |
| 3344 | Manufacturing | 1,889 | 2,584 | 695 | 37% |
| 3342 | Communications Equipment Manufacturing | 4,142 | 4,752 | 610 | 15% |
| 3121 | Beverage Manufacturing | 2,143 | 2,409 | 266 | 12% |
| 4841 | General Freight Trucking | 1,705 | 1,904 | 200 | 12% |
| 3221 | Pulp, Paper, and Paperboard Mills | 271 | 457 | 186 | 69% |
| 3261 | Plastics Product Manufacturing | 5,236 | 5,419 | 183 | 3% |
| 3116 | Animal Slaughtering and Processing | 278 | 426 | 147 | 53% |
| 3112 | Grain and Oilseed Milling | 221 | 364 | 143 | 64% |
| 3329 | Other Fabricated Metal Product Manufacturing | 1,121 | 1,259 | 138 | 12% |
| | Fruit and Vegetable Preserving and Specialty Food | | | | |
| 3114 | Manufacturing | 2,402 | 2,538 | 136 | 6% |
| | Navigational, Measuring, Electromedical, and Control | | | | |
| 3345 | Instruments Manufacturing | 3,691 | 3,791 | 99 | 3% |
| 3115 | Dairy Product Manufacturing | 432 | 529 | 97 | 23% |
| 4842 | Specialized Freight Trucking | 1,247 | 1,339 | 92 | 7% |
| | Pesticide, Fertilizer, and Other Agricultural Chemical | | | | |
| 3253 | Manufacturing | 213 | 301 | 88 | 41% |
| 3323 | Architectural and Structural Metals Manufacturing | 1,319 | 1,398 | 79 | 6% |
| 3118 | Bakeries and Tortilla Manufacturing | 1,325 | 1,403 | 78 | 6% |

Source: Lightcast



Flex Analysis

Town of Webster has a completely static market for flex space according to CoStar. There are 11 buildings making up 318,665 square feet of inventory. Since 2020 these buildings have been 100% occupied. There is no indication of ongoing construction, pending deliveries, vacancy, or changes to leasing rates during this period. In the thirteen years prior, going back to 2007, the space is fully occupied more than half of the time and the vacancy rate rises above 1% only once. There is record of one new lease event in 2019 for space priced at \$13.25 per square foot.

The real estate conditions for the Rochester MSA offer a market context for the geographic area surrounding Webster and give a glimpse of the feasibility of developing flex space in the Webster BOA. The trends for the metro area market are summarized below.

Regional Market Context

The Rochester MSA is the largest market for flex space in the vicinity of Town of Webster.

- **The last fifteen years have seen slow but steady growth in inventory.** There have been two periods (2008, 2013) where properties were removed from the market leading to sudden drops in inventory. The amount of leasable flex space has increased by 2.9% since 2007. There has been a shift towards smaller buildings compared with the older stock. The metro area has added more than 20 (net) buildings to the market.
- **Vacancy has been decreasing over time** and is down to 10.8% at the start of 2023. Flex vacancy has been cyclical in response to market downturns. The Rochester market saw relative peaks for vacancy during the 2009 and 2020 recessions. But between these events and since 2020, vacancy has been in retreat. The current level of vacancy is less than half of the 2009 peak.
- **Rates for space have been going up as available space tightens.** The Rochester market for industrial and flex is mature, but also quite inexpensive compared to the rest of the country. The current market rate is \$10.43, which is up slightly from an average of \$10.01 in 2022.
- **Last year was a peak for sales** of flex industrial properties in Rochester MSA. There were 17 deals totaling \$22.2 million. Sales for flex have been on an upward trend since 2019. For most recent years the Rochester market would see a handful of sales, but three out of the four recent years have all had at least 12 sales (2020 likely an outlier due to pandemic).
- **Deliveries have slowed to a stop for flex space.** There were no new arrivals in 2022 and none so far in 2023. There haven't been any buildings in the construction pipeline since 2020. Going back to 2007, the market had averaged almost 70,000 square feet of new flex space annually, but it seems developers have lost interest in this kind of space for now.
- **Net absorption was negative in 2022** which continues a volatile trend in the last few years of negative absorption. In the most recent year net absorption was -431,681 square feet or nearly 3% of inventory. Three of the last five years have had negative net absorption as space has become vacant and not reabsorbed by the market.





Interview findings


- **Several key industries driving industrial demand in the Rochester region.** Industry sectors expected to generate future demand for industrial real estate in the region include:
 - Food and Beverage Production
 - Semi-conductor Supply Chain
 - Optics, Photonics & Imaging
 - Clean Energy
 - Life Sciences
- **Demand for Flex Space.** The demand for flex space in the area is increasing. Particularly in the range of 40-60K SF.
- **Mid and Large-Scale Industrial Sites in High Demand.** For traditional industrial space users are typically looking for 20-100K SF. There have been some larger users looking for 100+ acres sites and buildings that are 200,000+ sf with the ability to expand. These large users are also looking for abundant power and rail access.
- **Unmet Demand for Warehouse and Distribution Facilities.** potential warehouse and distribution centers are limited with the available product on the market due to lower ceiling heights than what they require.
- **Much of the space available on the market is obsolete.** Availability and vacancy metrics may be skewed as much of the available inventory does not align with the needs of industrial enterprises in the market for real estate.
- **Insufficient industrial development is occurring.** There is demand for space, but developers are hesitant to build due to increasing interest rates and rising cost of building due to inflation. This has put the industrial market in a state of flux.
- **Community resistance to industrial uses in Webster may hinder market potential.** Industrial development is an issue that has not received the support from the community in the past. The public has voiced their disapproval of a proposed industrial development that ultimately did not move forward, which may limit future industrial development potential.





ATTACHMENT A: DATA SOURCES

 **Lightcast** (formerly Emsi Burning Glass) is a global leader in labor market analytics, offering a data platform that gives a comprehensive, nuanced, and up-to-date picture of labor markets at all scales from national to local. Key components of the platform include traditional labor market information, job postings analytics, talent profile data, compensation data, and skills analytics. Lightcast integrates government data with information from online job postings, talent profiles, and resumes to produce timely intelligence on the state of the labor market. Job and compensation data is available by industry, occupation, educational program, and skill type. [Click to learn more.](#)

 **Esri ArcGIS Business Analyst** combines proprietary statistical models covering demographic, business, and spending data with map-based analytics to offer insights on market opportunities for industries, businesses, and sites. Business Analyst integrates datasets covering a wide range of topics including demographics, consumer spending, market potential, customer segmentation, business locations, traffic counts, and crime indexes, which can be overlaid spatially to produce customizable maps and uncover market intelligence. Data can be pulled for standard and custom geographies, allowing for valuable comparison between places. [Click to learn more.](#)

 **PolicyMap** is a spatial analysis and data tool that facilitates the creation of compelling, interactive maps from 50,000+ indicators related to public policy. Geospatial analysis, including advanced querying and filtering facilitated by data-rich maps, can be used for storytelling and decision-making. PolicyMap's library of variables spans topics such as demographics, housing, lending, quality of life, economy, education, health, and government programs. Functionality is optimized for use by policymakers in government, business, healthcare, universities, academic, and others. [Click to learn more.](#)

 **IBISWorld** is a leading provider of expert industry research and analysis for broad sectors and niche industries across the economy. Thoroughly researched industry reports from IBISWorld leverage economic, demographic, and market data into forward-looking insight, providing detailed data and narrative on current and historic trends, as well as future outlook and projections. Topics covered include products and services, major markets, upstream and downstream supply chain industries, performance drivers, factors for competitiveness, operating conditions, major players, and key statistics on industry performance. Reports are available by industry at the global, national, and state level. [Click to learn more.](#)

 **CoStar** is a comprehensive source of commercial real estate intelligence, offering an inventory of over 6.4 million commercial properties spanning 135 billion square feet of space in 390 markets across the US. CoStar covers office, retail, industrial, hospitality, and multifamily markets. Property- and market-level data on absorption, occupancy, lease rates, tenants, listings, and transactions are researched and verified through calls to property managers, review of public records, visits to construction sites, and desktop research to uncover nearly real-time market changes. [Click to learn more.](#)



RealtyRates.com is a survey-based resource for real estate investment and development trends, analytics, and market research. RealtyRates.com surveys more than 300 lenders, investors, brokers, and property managers nationwide on a quarterly basis to track trends in cap rates, financing terms, rents, sales, and operating expenses. This data provides an up-to-date snapshot of the national real estate market. [Click to learn more.](#)



RSMMeans data from Gordian provides up-to-date construction cost information for dozens of residential and commercial building types. Cost-per-square-foot data can be used to develop construction cost estimates for use in market analysis and financial feasibility analysis, incorporating estimates for material, labor, and equipment. National cost averages can be adjusted for 970+ specific geographies using location factors down to the city level, and historical cost indexes can be used to adjust costs over time. [Click to learn more.](#)



AirDNA provides market intelligence on short-term rental properties around the globe. Powered by Vrbo and Airbnb data from over 10 million properties in 120,000 markets, AirDNA aggregates and analyzes property-level listings to distill market trends and forecasts. Granular data at the ZIP code level on nightly rates, occupancy, monthly revenue potential, property type, ratings, and seasonality can be leveraged to understand broader residential market dynamics and the impact of short-term rentals on housing supply and demand. [Click here to learn more.](#)



Redfin is a national real estate brokerage and analytics firm that offers access to its extensive for-sale residential property listings database. Data is aggregated from the hundreds of local multiple listings services (MLS) used by real estate agents in the markets where it operates. The data covers broker-listed homes from the MLS, homes in foreclosure, select for-sale by owner (FSBO) homes, and records of past sales. Redfin's downloadable data on market trends is released monthly and is available at the national, metro, state, county, city, ZIP code, and neighborhood level. [Click here to learn more.](#)



Multiple Listings Services (MLS) are individual private databases of for-sale residential property listings designed to consolidate property information and connect homebuyers and sellers. More than 500 MLSs exist in the US, covering different geographic regions and markets. Individual property listings are often publicly accessible, while aggregated data on sales prices and trends can typically only be accessed through direct cooperation with an MLS. Many MLSs also provide listing information to third-party aggregators such as Realtor.com or Zillow. [Click here to learn more.](#)



AUTM (formerly the Association for University Technology Managers) maintains the STATT database (Statistics Access for Technology Transfer), a tool that aggregates three decades of licensing data for US research institutions. Such data provides insights into the role that research institutions play in local and regional innovation ecosystems through technology transfer and the launch of startup companies. The data covers variables such as research expenditures, activity and income, startups, funding, patent applications, disclosures, and royalties earned. [Click to learn more.](#)



Crunchbase offers a best-in-class live database on innovative companies across industries, powered by contributors, partners, and in-house data experts. With a focus on tech companies and startups, the platform aggregates information on investment and funding, founding members and leadership, mergers and acquisitions, news, and industry trends. Designed as both a market research and prospecting solution, Crunchbase offers the ability to narrow down companies matching criteria such as headquarter location, investment stage, or industry, while automatically offering recommendations based on these criteria. [Click to learn more.](#)



Demandbase is an account-based marketing, sales intelligence, and data platform used for identifying and gathering information on businesses, contacts, and prospects. Applications in the economic development space include developing databases of existing companies for business retention and expansion outreach, compiling marketing lists for business attraction prospecting, creating watchlists for following news on relevant companies and industries, identifying companies in



specific sectors and regions, and accessing contact information for key decisionmakers across businesses. [Click to learn more.](#)



The **Kauffman Indicators of Entrepreneurship** offers measures, reports, and accompanying data visualizations that present entrepreneurial trends in the US. The indicators are organized into three series covering entrepreneurial jobs, new employer businesses, and early-stage entrepreneurship. Underlying data sources include the Current Population Survey (CPS), Population Estimates Program (PEP), Business Formation Statistics (BFS), and Business Dynamics Statistics (BDS) from the US Census Bureau, and Business Employment Dynamics (BED) from the Bureau of Labor Statistics. [Click to learn more.](#)



The **American Community Survey (ACS)** is an ongoing statistical survey by the US Census Bureau that gathers demographic and socioeconomic information on age, sex, race, family and relationships, income and benefits, health insurance, education, veteran status, disabilities, commute patterns, and other topics. Mandatory to fill out, the survey is sent to a small sample of the population on a rotating basis. The questions on the ACS are different than those asked on the decennial census and provide ongoing demographic updates of the nation down to the block group level. [Click to learn more.](#)



Conducted every ten years in years ending in zero, the **US Decennial Census of Population and Housing** is a complete count of each resident of the nation based on where they live on April 1st of the Census year. The Constitution mandates the enumeration to determine how to apportion the House of Representatives among the states. The latest release of the 2020 Census contains data for a limited number of variables, including: total population by race/ethnicity, population under 18, occupied and vacant housing units, and group quarters population. [Click to learn more.](#)



The **Local Area Unemployment Statistics (LAUS)** program estimates total employment and unemployment for approximately 7,500 geographic areas on a monthly basis, from the national level down to the city and town level. LAUS data is offered through the US Bureau of Labor Statistics (BLS) by combining data from the Current Population Survey (CPS), Current Employment Statistics (CES) survey, and state unemployment (UI) systems. [Click to learn more.](#)

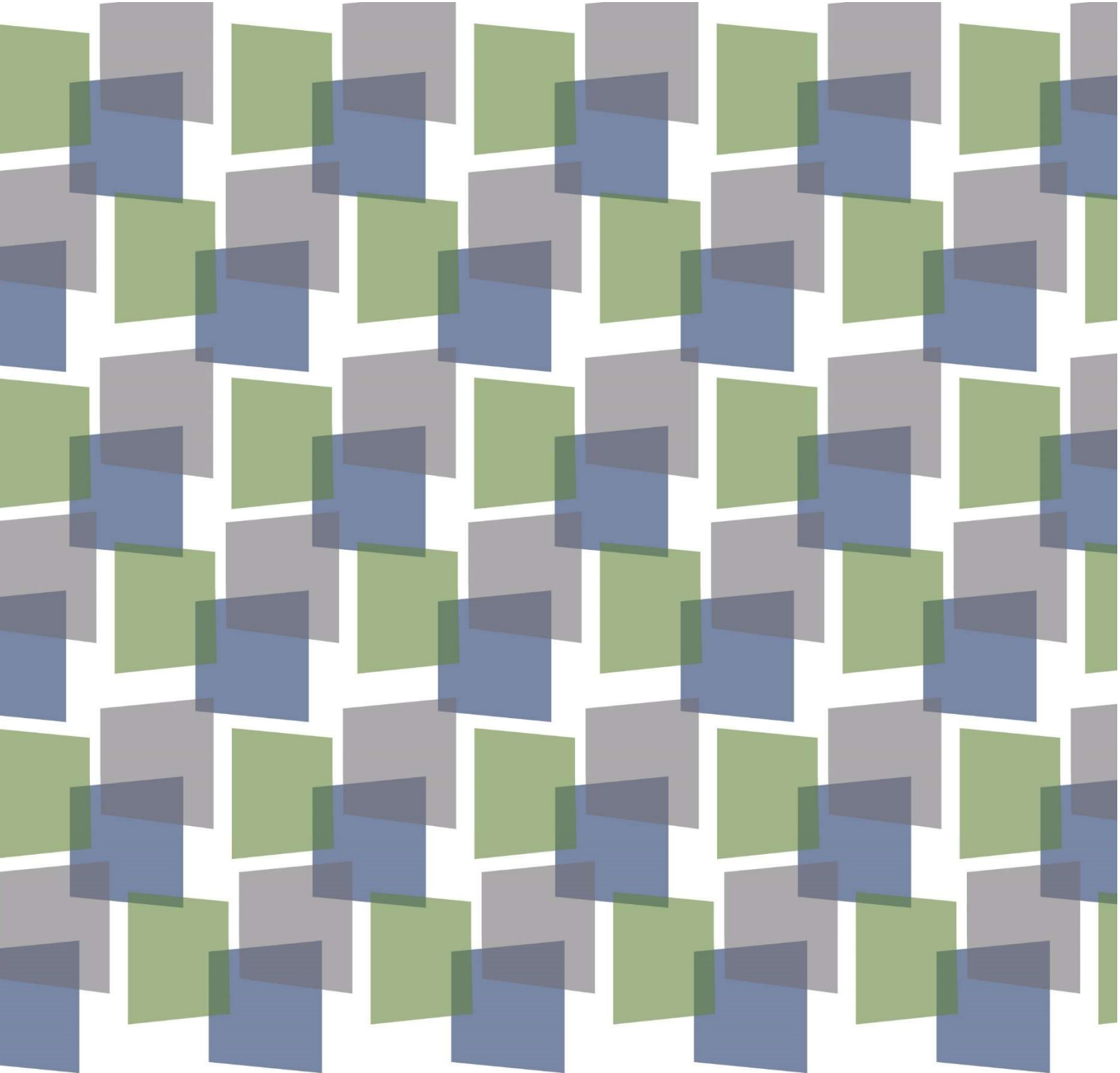


The **Census of Agriculture** provides a detailed picture of US farms and ranches and the people who operate them. It provides uniform, comprehensive agricultural data for every state and county in the US on topics including agricultural land, animal and crop production, employment, worker demographics, farm business operations, and the environment. It is conducted by the US Department of Agriculture (USDA) every five years, in years ending in 2 and 7. [Click to learn more.](#)



TradeStats Express (TSE) National and State Dashboards present data on US exports and imports by trade partner and product for 2009 forward. Data are presented using two classification systems: the Harmonized System (HS) and the North American Industrial Classification System (NAICS). National trade statistics in TSE cover the physical movement of merchandise between the United States and foreign regions. State trade statistics cover the physical movement of merchandise between a given state and foreign regions. [Click to learn more.](#)





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APPENDIX C.

**COMMUNITY
ENGAGEMENT
STRATEGY**



Village of Webster

North End Business District BOA Nomination Study

Community Engagement Strategy

February 2023

This document was prepared for the Village of Webster and the New York State Department of State with State funds provided through the Brownfield Opportunity Areas program.

Introduction

The Community Engagement Strategy (CES) will serve as a guide for engagement activities over the course of the planning process in order to foster diverse, meaningful, public engagement throughout the planning process.

Components of the CES

The planning process will include the following engagement strategies:

1. Project Management Meetings
2. Steering Committee Meetings
3. Stakeholder / Focus Group Meetings
4. Public Events
5. Youth Engagement
6. Project Website

The Brownfield Opportunity Area (BOA) Program

The BOA program is administered by the New York State Department of State and provides funding to municipalities to develop area-wide plans focused on economic development. Through this process municipalities receive technical assistance to assess the impacts of potential brownfield sites in their communities and develop a vision and strategy for reinvestment and revitalization.

Overview

The Village of Webster, NY was selected for funding to develop a revitalization strategy through the New York State Brownfield Opportunities Area Program (BOA). The goal of this project is to create a vision for the Village of Webster's North End, and identify opportunities for revitalization and reuse within the North End Business District. An essential aspect of this project is to foster community awareness and solicit input regarding issues, opportunities, and assets that should be addressed or capitalized on during the planning process.

Purpose

The public outreach efforts throughout the planning process will help to ensure that the Plan reflects the Village's values and vision for the future of the North End Business District by engaging residents and stakeholders in an inviting atmosphere that encourages input from the full spectrum of residents and stakeholders. The project team seeks to solicit opinions and comments on all draft deliverables and associated materials in an objective and intuitive format that does not require technical expertise to interpret. In addition to public input, the planning process will be guided by Village Staff, the Steering Committee, and local stakeholders.

Adaptability

This strategy is not a checklist of required actions, but rather, it is a flexible framework that may be adapted as the planning process unfolds.

Project Team

Consultant Team

The consultant team from will facilitate the public outreach process, which includes coordination of meeting and event timing, development of presentation materials, creation of advertising materials, facilitation of meetings and events, and provision of summaries / outcomes of engagement activities. All engagement efforts will be coordinated through the consultant team, but additional efforts outside of the scope of this project may be conducted by Steering Committee members or Village Staff. The members of the consultant team and their respective roles are as follows:

- **Bergmann:**
 - Project management
 - Existing conditions analysis
 - Community engagement
 - Master plan alternatives
 - Implementation strategy
 - SEQR / designation process

- **Lu Engineers:**
 - Brownfield inventory
 - Phase I ESAs
 - Coordination with NYSDEC

- **Camoin:**
 - Market analysis
Redevelopment opportunities
 - Financial feasibility assessments

- **Sue Steele Landscape Architecture:**
 - Master plan alternatives
 - Public space improvements
 - Community engagement

Village Staff / Webster Economic Development Alliance (WEDA)

Village and WEDA Staff will act as liaisons between the Consultant Team, the Steering Committee, and Project Stakeholders. The primary role of Village Staff will be to steer the process through review of draft deliverables and regular discussion with the Consultant Team.

Project Team (cont.)

Steering Committee

A Steering Committee was formed at the onset of the project made up of local stakeholders, business owners, Village Staff and other local individuals with vested interest in this project. The primary role of the Committee will be to guide the planning process, review all deliverables, and provide essential feedback on all draft materials. Additionally, the Committee will help to identify key issues and opportunities that will serve to inform the project.

Project Stakeholders

The Village and consultant team will identify key stakeholders to engage throughout the planning process to gain insight into the issues and opportunities associated with this project. The individuals or groups chosen may include, but is not limited to, members of the business community, local developers, and other entities that have an involved role in the outcomes of this process. These stakeholders will be interviewed one-on-one or in small groups in order for the Project Team to obtain an in-depth understanding of the local context, opinions, and opportunities associated with the transformation of the North End Business District.

The Public

The public will be engaged throughout the project process to ensure the local concerns, thoughts, and ideas of residents are reflected throughout each component of the Study. The first outreach efforts will be held early on in the process to: 1) inform the public of the project; and 2) allow residents and stakeholders to share key issues and opportunities within in the North End Business District they'd like to see addressed. Additional outreach efforts will be held throughout the planning process to provide the public with an opportunity to review draft materials and ensure that their vision for the future of the BOA Study Area is reflected in the final report.

Engagement Process

An effective engagement strategy is critical to achieving the following goals: 1) keeping the community informed throughout the planning process; and 2) providing a number of public input opportunities at key points in the planning process.

This outreach strategy is intended to encourage continual communication with residents, property owners, community leaders, advocacy groups, stakeholders, and local government officials through in-person and/or virtual meetings, online engagement tools, and established local broadcasting methods.

Various strategies will be applied to ensure two-way communication is sustained throughout the entirety of the project regarding the desired outcomes of the Study with respect to redevelopment opportunities and placemaking strategies within the North End Business District that will shape the identity of this area of the Village of Webster for the foreseeable future.

This Community Engagement Strategy (CES) will identify the critical points in the project process during which it is important to communicate progress and solicit feedback before moving forward with the planning process. The development of this CES will direct the efforts of the project team to providing meaningful public engagement opportunities while understanding the need for flexibility of the timing and format of public input to best serve the planning process as it evolves over the project timeline. The information and outcomes expected from undertaking the engagement strategies outlined in this document are presented on the following page.

Engagement Process (cont.)

Key Issues, Opportunities & Context

By engaging the public and project stakeholders early in the amendment process, the Project Team seeks to understand how the existing conditions of the North End Business District contribute to and detract from the desired character and built form of Webster. The team will also seek to identify the most pressing concerns regarding development in this area, as well as preliminary ideas for how the District can better serve the Village's vision for the future. Gathering this information will help the Project Team develop a baseline and direction for the planning process, and ensure that the concepts developed reflect the needs of the community from the very beginning of the process.

Input on Draft Recommendations

Once the Project Team has produced draft recommendations based on the information received at the beginning of the project, it will be crucial for the Project Team to seek input on them in order to ensure that they reflect the goals and desired outcomes determined in the preliminary outreach processes.

Community Ownership & Support

One of the most important outcomes of the public outreach process is community ownership of and support for the transformation of the North End Business District based on a solid understanding of the Study's components and potential benefits. In order to accomplish this, it will be essential to inform the community from the beginning of the project process precisely what the Study is and is not intended to accomplish, and to continually update the community on project progress. This will help to ensure that the planning process is not seen as a "top-down" approach to altering the character of the North End Business District, but rather a community-based process that serves the varying interests of residents and stakeholders in the Village to the greatest extent practicable.

Project Management Meetings

Regular meetings to review project progress, status, and discuss work products with Village staff, WEDA, and the New York State Department of State (DOS).

Participation

Involved Village staff members, WEDA, and DOS will be included on these meetings, and the Consultant Team will be responsible for coordinating additional participation with members of the project team. Project management meetings will be held throughout the planning process to coordinate efforts, review preliminary deliverables, and discuss any necessary components of the planning process.

Format

Project management meetings will primarily be held virtually, but may be held in-person as deemed necessary.

Notification

Meeting minutes will be sent by the consultant team.

Schedule

Project management meetings will be held monthly from February 2023 through December 2023.

Expected Outcomes

- Consultant team receives guidance on Study development
- Village review and feedback on draft materials
- Coordination of engagement efforts

Roles & Responsibilities

- Consultant team will prepare meeting agendas
- Village staff / WEDA will provide input and guidance for the planning process
- DOS will provide guidance and input on process and DOS requirements

Steering Committee Meetings

Meetings held approximately every other month to provide updates on the planning process, discuss community needs and desires, and review draft Study components with Committee members.

Participation

The Steering Committee is comprised of stakeholders who provide diverse perspectives and experiences and local knowledge to inform the Study. Committee members may include but are not limited to: local and regional government officials, property owners, business owners, and other key stakeholders with local knowledge or experience. Committee members are asked to identify key issues and opportunities in the BOA area and provide feedback and guidance regarding the draft Study.

Format

Committee meetings will primarily be held in-person, but may be held virtually as needed. Meeting locations for in-person meetings will be ADA accessible.

Notification

Committee members will receive notification for all meetings from WEDA or Bergmann at least two weeks in advance of the meeting date.

Schedule

It is expected that six committee meetings will be held from January 2023 through December 2023. Additional meetings may be scheduled as needed.

Expected Outcomes

- Consultant team receives input on community desires, needs & concerns within the study area
- Committee discussion and feedback on draft materials

Roles & Responsibilities

- Consultant team will prepare meeting agendas and any required presentation materials
- Committee will review draft materials as presented and provide input and guidance for the planning process.

Stakeholder / Focus Group Meetings

Meetings or interviews with key stakeholders to gather critical information, understand community needs, and inform draft components of the Plan

Participation

The consultant team will interview stakeholders via one-on-one or topic-specific small group meetings. Stakeholder meetings will occur early in the process and reoccur as needed to maintain lines of communication and ensure key stakeholder groups are informed of project progress. Stakeholder groups may include Village / Town / WEDA staff, property owners, members of the business community, and real estate professionals.

Bergmann will also meet with local officials and regional and State agencies as needed to further strategic site development strategies.

Format

Stakeholder interviews will be conducted through a combination of in-person and virtual interviews and focus group meetings. Interviews will involve organic discussion between stakeholders and the consultant team, to better understand community needs.

Notification

Stakeholders will receive an interview or focus group invitation from the consultant team.

Schedule

Stakeholder Meetings will begin in early 2023 and will occur over the duration of the planning process on an as-needed basis.

Expected Outcomes

- Consultant team receives input on community desires, needs & concerns within the BOA boundary.
- Stakeholders inform consultant team of key issues, concerns, and opportunities in the BOA boundary.

Roles & Responsibilities

- Consultant team will schedule and facilitate interviews / meetings.
- Village staff will assist in identifying stakeholders.
- Stakeholders will provide input.

Public Events

Engaging community events to inform and educate the public about the project, gather feedback, refine recommendations, and define community values.

Participation

Public events are open to any and all members of the community. Participation by a diverse group of community members will be encouraged.

Format

Occurring at key junctures of the project process, the public will be invited to partake in the planning process and learn more about the North End Business District BOA Study. These events are flexible regarding their structure, format and timing, but many include project specific meetings or workshops, open houses, pop-up events, or combined events with other community planning efforts. Each public event will utilize innovative approaches and non-traditional meeting formats to foster a collaborative, enjoyable, and engaging environment that encourages participation.

For all events, the Consultant will provide visual aids and present technical information to guide discussion and the exchange of ideas. The Consultant will work with the Village to arrange for the location and format of public events and determine whether they will be held virtually or in person. If virtual, the Consultant may utilize virtual platforms to host meetings, such as Microsoft Teams.

Notification

Public events will be widely advertised through various outlets, including the project website and social media channels.

Schedule

Up to five public engagement events will be held throughout the duration of the project. Exact times, dates, and locations will be identified with input from the Village of Webster and the Steering Committee. Some potential events and dates are as follows:

- Community Arts Day: April 15th
- Summer Celebration: June 10th
- Joe Obbie Farmer’s Market: Wednesdays
- Webster Jazz Festival: Typically in August

Public Events (cont.)

Expected Outcomes

- Preliminary identification of issues/ opportunities by public.
- Identification of redevelopment preferences
- Public feedback on draft recommendations
- Public awareness and support of the project

Roles & Responsibilities

- Consultant team will create meeting advertisements and promotional materials.
- Consultant team will create presentation materials and input mechanisms.
- Village staff will assist in securing venues for in-person events.
- Consultant team, Village staff, and committee members will assist in facilitating discussions with attendees as necessary.
- Consultant team will record and summarize all input for distribution.

Youth Engagement

Targeted engagement with the Webster Central School District to provide opportunities for young residents to participate in the planning process.

Participation

School aged children will be asked to participate, coordinated through the Webster Central School District.

Format

Youth engagement is flexible in its format, and may take the form of members of the project team visiting local schools during the school day for a presentation and visioning exercises, after-school activities, or other programming as desired / recommended by the School District.

Schedule

Youth engagement will be conducted as appropriate with the timing of the school year.

Expected Outcomes

- Youth awareness of importance of / right to participate in community planning processes.
- Identification of preferences / vision for the future from younger demographic than typically received at traditional outreach events.

Roles & Responsibilities

- School District will coordinate timing and location of engagement activities
- Consultant team will facilitate activities and prepare any necessary materials.
- Consultant team will record and summarize all input for distribution.

Project Website

An online repository for all project information, including project documents, the public event schedule, and other materials.

Participation

The website will be publicly accessible through a custom website domain to be determined based on discussion with Village Staff.

Format

The website will provide community members with access to project information and documents, meeting schedules and summaries, and a mechanism for submitting input and general feedback. The website will also link to the Village of Webster's website and any other relevant sites.

The consultant will create the project website and develop content for posting throughout the planning process.

Website Domain

Consistent with project branding, the website URL will be **ReimagineWebster.com**.

Schedule

The website will go live in early 2023 and will be continually updated with new content throughout the duration of the project.

Expected Outcomes

- Public awareness and support of the project
- Continual input mechanism for members of the public
- Digital access to project documents and associated materials.

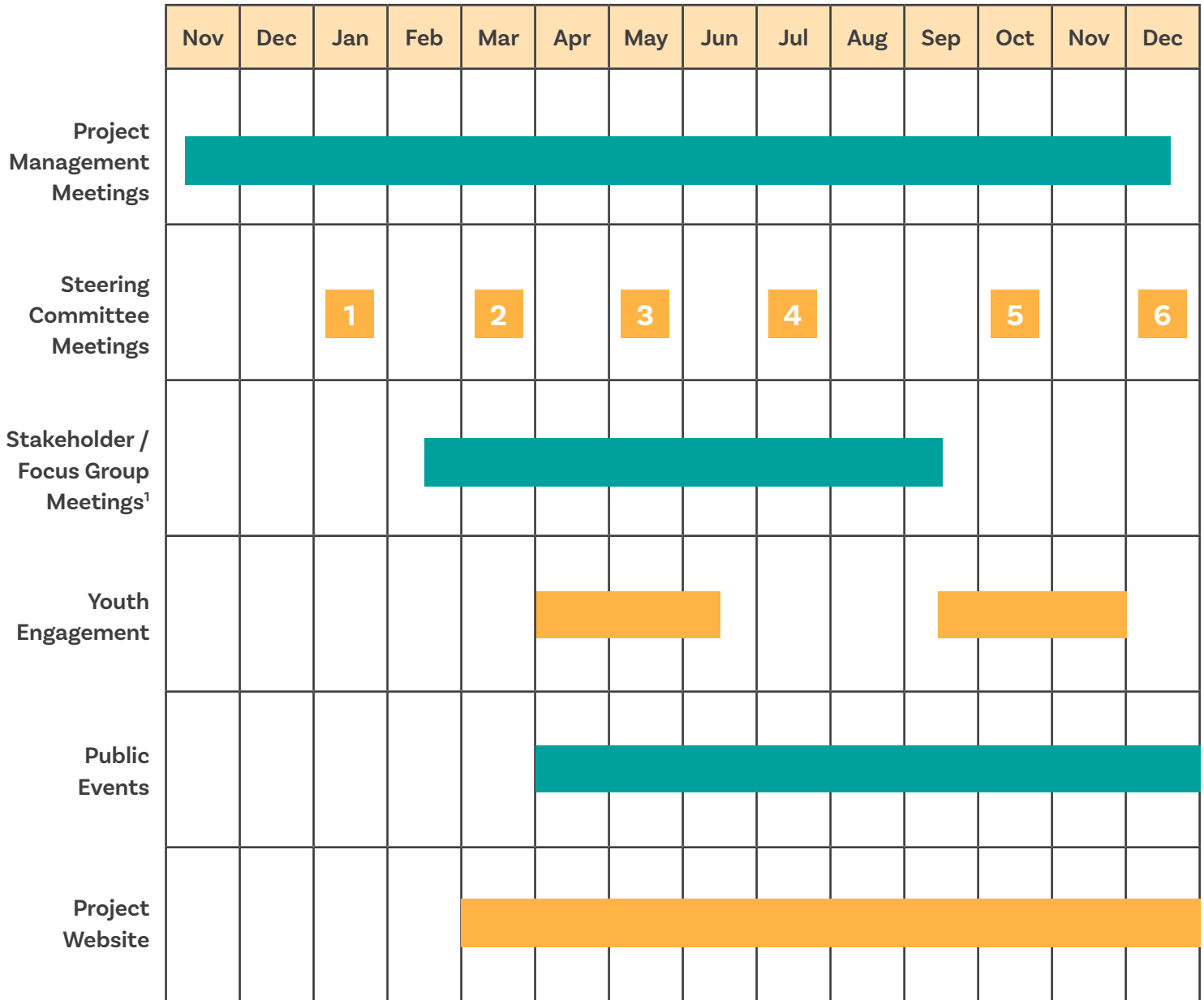
Roles & Responsibilities

- Consultant team will develop website and update with new content continually.
- Village staff to review materials and approve content for website.

Engagement Schedule

2022

2023



¹Stakeholder and focus group meetings will be coordinated as appropriate based on the input desired.

APPENDIX D.

MEETING SUMMARIES



VILLAGE OF WEBSTER NORTH END BUSINESS DISTRICT BOA NOMINATION

Steering Committee Kick Off Meeting
Tuesday, January, 10 2023 at 9:00 AM

MEETING SUMMARY

The purpose of the kick-off meeting was to introduce the project team and committee members; inform the committee of the purpose and components of the Brownfield Opportunity Area program; review the BOA boundary, scope and schedule; and discuss potential community engagement strategies. Attendees included:

- Kimberly Baptiste, Bergmann
- Katie Darcy, Bergmann
- Gary Flisnik, Bergmann
- Matt Chatfield, WEDA
- Jake Swingly, Village of Webster
- Josh Artuso, Town of Webster
- Sam Aldrich, NYS DOS
- Melissa Keller, NYS DOS
- Bill Horeth, Kittelberger Florist
- Bill Karpen, Xerox
- John Barrett, Xerox
- Jonathan Nwagbaraocha, Xerox

Matt Chatfield began the meeting by thanking everyone for their participation, and facilitating introductions. Kimberly Baptiste then kicked off the presentation by reviewing the agenda of the meeting. She then gave an overview of the BOA program and its benefits; and discussed the roles and responsibilities of consultant team, the Village, and DOS. Following this, the draft BOA boundary was discussed, and modified to include some adjacent property (see notes and revised map below). Kimberly then reviewed the scope and schedule of the project, and asked the committee to participate in some visioning discussions regarding key challenges and opportunities in the BOA area. Finally, draft community engagement strategy was discussed, and feedback was solicited regarding public engagement opportunities. Next steps were discussed, and the meeting adjourned at 10:30 AM. Some of the key discussion points are summarized by topic area below:

BOA Boundary

- Philips Road was included in the BOA area to help steer the vision for the County's roadway improvement project along the corridor. The County is currently selecting a consultant, and construction is anticipated to occur in 2026. The project runs from Route 104 to Schlegel Road.
- The Town and Village are interested in cleaning up some of their jurisdictional boundaries to help facilitate redevelopment opportunities as they occur (i.e. within Xerox properties)
- The Town Recreational Complex adjacent to the current boundary should be included to capitalize on any potential funding opportunities to enhance the facilities and programming.
- Focus Area 1 should be broken into three sub-sections.



Scope & Schedule – Key Challenges & Opportunities

- The BOA Area is not Main Street – it gets less attention and is often looked over.
- There is a lack of investment in this area of the Village.
- The area also lacks an overall vision.
- Property owners don't invest in their property because of a perceived lack of return on investment.
- It seems that there is no one that wants to be the first one to invest in their property.
- There are environmental concerns – real / perceived and known / unknown.
- The BOA area was the historical industrial hub of the Town, and thus there were some relatively intensive uses and some soil contamination as a result.
- There needs to be more input from business owners regarding the vision for the future of the area.
- The physical barriers of Route 104 and Route 250 are a challenge in walkability and connectivity to the rest of the Village.
- There is no public gathering space north of Route 104 in the Village.
- The BOA area is mostly privately owned – there is not much land area that the Village and/or other governmental agencies have direct control over.
- The Business Improvement District (BID) struggles to get the North End business owners engaged / involved in their efforts.
- There is not a lot of retail in the area as compared to Main Street.
- This project represents an opportunity to engage with more business owners and other stakeholders in the area.
- Pedestrian connections within the study area and to other areas of the Village / Town should be strengthened.
- There are many recreational and trail resources within and adjacent to the BOA area.
- More events / activities through the BID could be supported in the North End through this effort.
- This process can provide guidance on reuse of Xerox properties.
- Permitting and environmental regulatory processes can be streamlined.
- There has been increased pedestrian activity in the North End.
- There is a lot of underutilized land, which equates to a lot of opportunity for development.
- There is a large parcel in Focus Area 2 that is undeveloped, and has been on the market for 20-25 years, but is a substantial opportunity for new development in the area.
- The BOA study should be community focused – not hone in on businesses.

Community Engagement Strategy

- The project could involve the Parks and Recreation department and their programming.
- The Summer Celebration is on June 10th, held by the Town of Webster's Parks and Recreationa Department at the recreation center on Chiyoda Drive.
- The Tour de Cure is also on the same day (6/10).
- The Town's Comprehensive Plan process should begin in 2023, and there will be opportunities to combine public engagement efforts.
- The Joe Obbie Farmers Market is held at the Charles E. Sexton Park on Wednesdays from June through October.



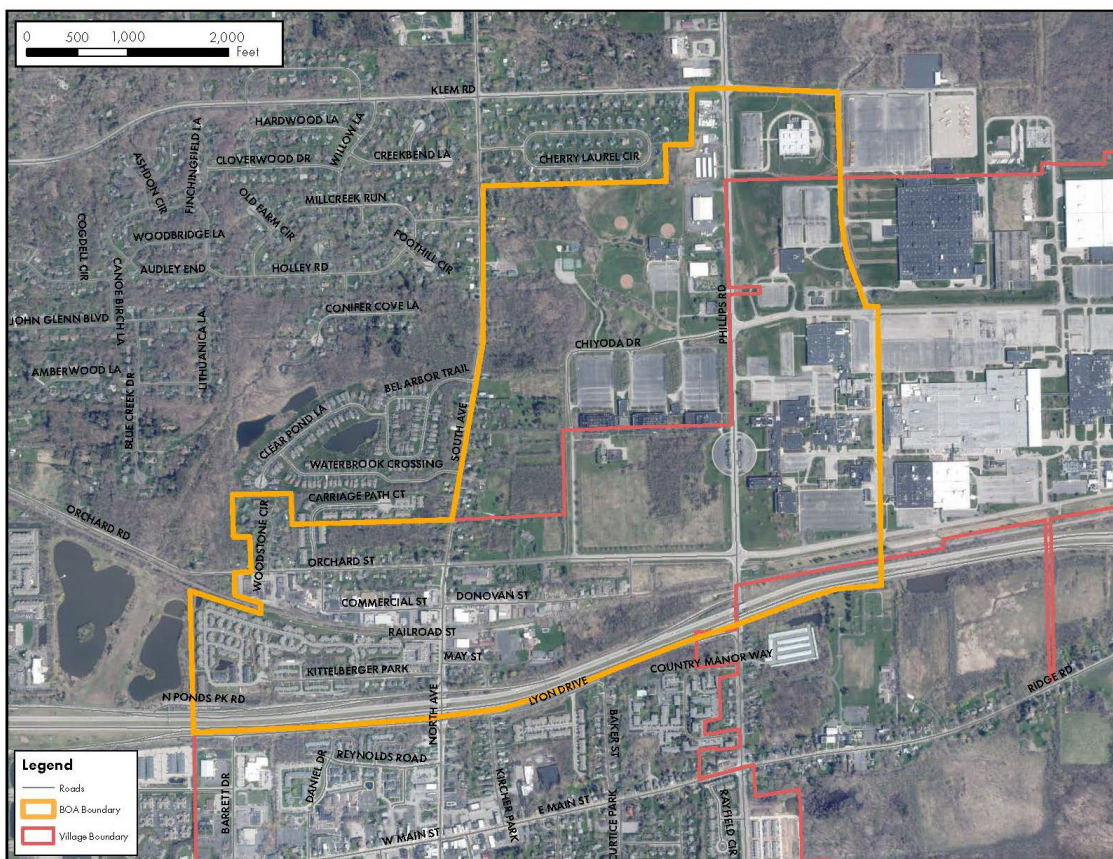
STEERING COMMITTEE MEETING

- The Webster Jazz Festival is widely attended and will be held on August 18-19th on Main Street by the Business Improvement District (BID).
- Community Arts Day is a major community event organized by the Webster PTSA in coordination with Webster Central Schools. The the project team will be attending on Saturday, April 15th.
- The project team may consider including the Town Highway Department or the Park and Recreation Department in the steering committee.
- There should be opportunities for people who don't attend public meetings to engage in other ways.
- The Webster Central School District will be very happy to get involved.

NEXT STEPS

- Bergmann will begin drafting the Existing Conditions Analysis.
- Stakeholder Meetings will begin in February.
- Steering Committee members are asked to provide any ideas for a project website name by 1/20.
- Bergmann will revise the BOA Boundary to include the Webster Recreational Complex.
- Upcoming Steering Committee Dates – **PLEASE HOLD ON YOUR CALENDARS!**
 - o March 21st @ 9 AM
 - o May 16th @ 9 AM

REVISED BOUNDARY MAP





VILLAGE OF WEBSTER NORTH END BUSINESS DISTRICT BOA NOMINATION

Steering Committee Meeting #2

Tuesday, March 21, 2023 at 9:00 AM

MEETING SUMMARY

The second committee meeting for the North End Business District BOA Nomination Study was held on Tuesday, March 21 2023 at 9:00 AM. The purpose of the meeting was to inform attendees of the progress made since the kick-off meeting, talk about upcoming public engagement events, review preliminary findings from the Inventory and Analysis investigation, and discuss potential strategic sites and subareas within the BOA boundary. Attendees included:

- Kimberly Baptiste, Bergmann
- Katie Darcy, Bergmann
- Greg Andrus, Lu Engineers
- Dan Stevens, Camoin Associates
- Matt Chatfield, WEDA
- Jake Swingly, Village of Webster
- Josh Artuso, Town of Webster
- Melissa Keller, NYS DOS
- Bill Karpen, Xerox
- Jonathan Nwagbaraocha, Xerox
- Darrell Byerts, Village of Webster
- Elena Bernardi, Webster BID

Kimberly Baptiste kicked off the meeting by facilitating introductions for new attendees and reviewing the agenda. She then provided a status update on the project, including the revised BOA boundary and an overview of some upcoming public outreach events. Following this, various members of the consultant team presented some of the initial findings from the Inventory & Analysis section – including physical characteristics of the study area, market characteristics, and environmental considerations. The remainder of the meeting was used to discuss the preliminary strategic sites identified within the BOA, potential opportunities for each of the identified sites, and what sites may be missing. Next steps were discussed, and the meeting adjourned at 10:30 AM. Key discussion points are summarized by topic area below:

General Discussion

- With Tessa Plastics moving into Buildings 200, 210, and 214 on the Xerox Campus, there may be increased vehicular traffic along Philips Road which should be considered during the Philips Road improvement project that Monroe County is undertaking.
- Although the property classification code for multi-family dwellings is commercial, those areas within the BOA should be reflected as residential on the existing land use map.
- The Town's recreation campus should be identified as "Recreation & Entertainment" on the existing land use map instead of "Community Services."



STEERING COMMITTEE MEETING

- The Town sees about 300 housing starts annually.
- The manner in which environmental concerns is relayed to property owners within the BOA will be important.
- In addition to level of contamination, environmental permitting requirements should be included as a determining factor in selecting / prioritizing strategic sites.

Strategic Sites Discussion

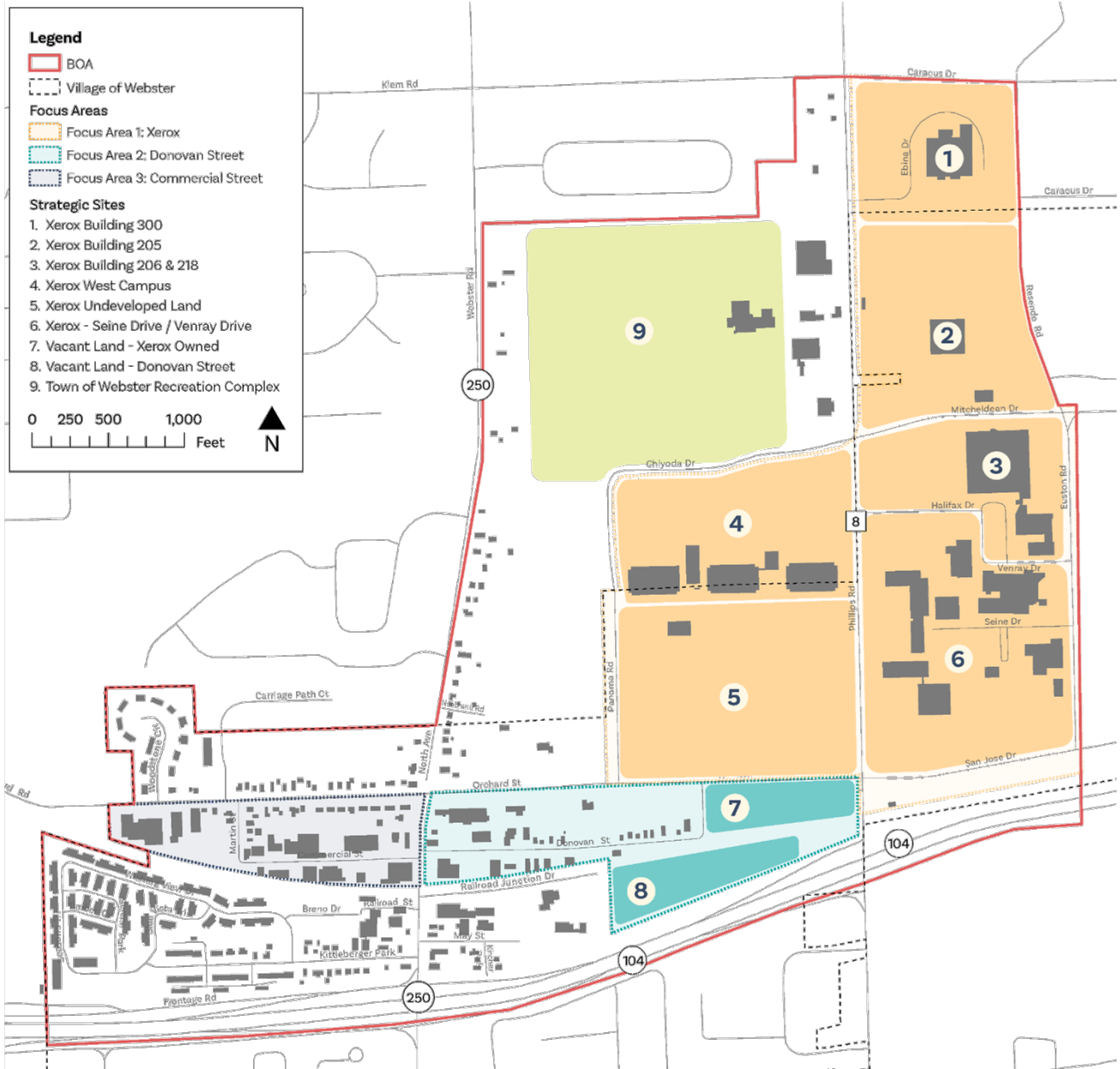
- Strategic Site 1, or Building 300, is currently used as a data center by Xerox, and has a high level of criticality for the company. The use of this site is not changing imminently.
- Strategic Site 2, or Building 205, has been submitted for Fast NY Track B funding to complete due diligence / highest and best use study. This site is a high priority for Xerox.
- Building 218 is currently occupied by Xerox, and should be its own site (Strategic Site 3).
- Buildings 206 and 212 should move from Strategic Site 3 to Strategic Site 6.
- Strategic Sites 4 and 5 should be combined as a singular West Campus strategic site.
- Currently, the middle building on West Campus is 60-70% occupied.
- The West Campus site is Xerox's highest priority in terms of redevelopment opportunities, and also has been submitted for Fast NY Track B funding.
- Building 201 (Strategic Site 6) is currently occupied by chemical mix rooms, which are not easy to move.
- Xerox owns Strategic Site 7, as well as the part of Orchard Street that separates Site 7 from Sites 4 and 5.
- There are currently plans in motion to build a small industrial park / flex space on Strategic Site 8. It is currently in the process of being sold.
- The Town Parks and Recreation Department is actively working on a Master Plan update for the Town's parks system.
- The Town recreation campus (Strategic Site 9) uses Xerox's parking lots on their West Campus for overflow parking during major events.
- An additional strategic site should be considered for the western frontage of Panama Road. It is currently zoned R-3, and the potential extension of Chiyoda Drive from Philips Road to Route 250 could create a potential opportunity for more residential development in that area.
- The initial priorities for strategic sites include the Xerox West Campus, streetscape improvements within the Commercial Street and Donovan Street subareas, and the Town's recreation campus.

NEXT STEPS

- Stakeholder Meetings began on March 22, and will continue through April.
- The project team will have a table at Community Arts Day on April 15th.
- Bergmann will revise the land use maps to reflect the residential and recreation / entertainment destinations.
- Bergmann will update the Strategic Sites map to reflect feedback from the Committee.
- The next steering committee meeting will be held on May 16th at 9:00 AM.
- Bergmann will draft a vision statement and goals to present at the May Committee meeting.
- A draft Inventory and Analysis Draft document will be produced in May.



DRAFT STRATEGIC SITES MAP (MARCH 24, 2023)



VILLAGE OF WEBSTER REIMAGINE WEBSTER

Steering Committee Meeting #3

Tuesday, May 16, 2023

MEETING SUMMARY

The third committee meeting for the Reimagine Webster BOA Nomination Study was held on Tuesday, May 16, 2023 at 9:00 AM. The purpose of the meeting was to discuss the project status, review the findings of the draft market analysis report, and conduct a visioning session for each of the identified strategic sites, as well as area-wide improvements for the entire study area. Attendees included:

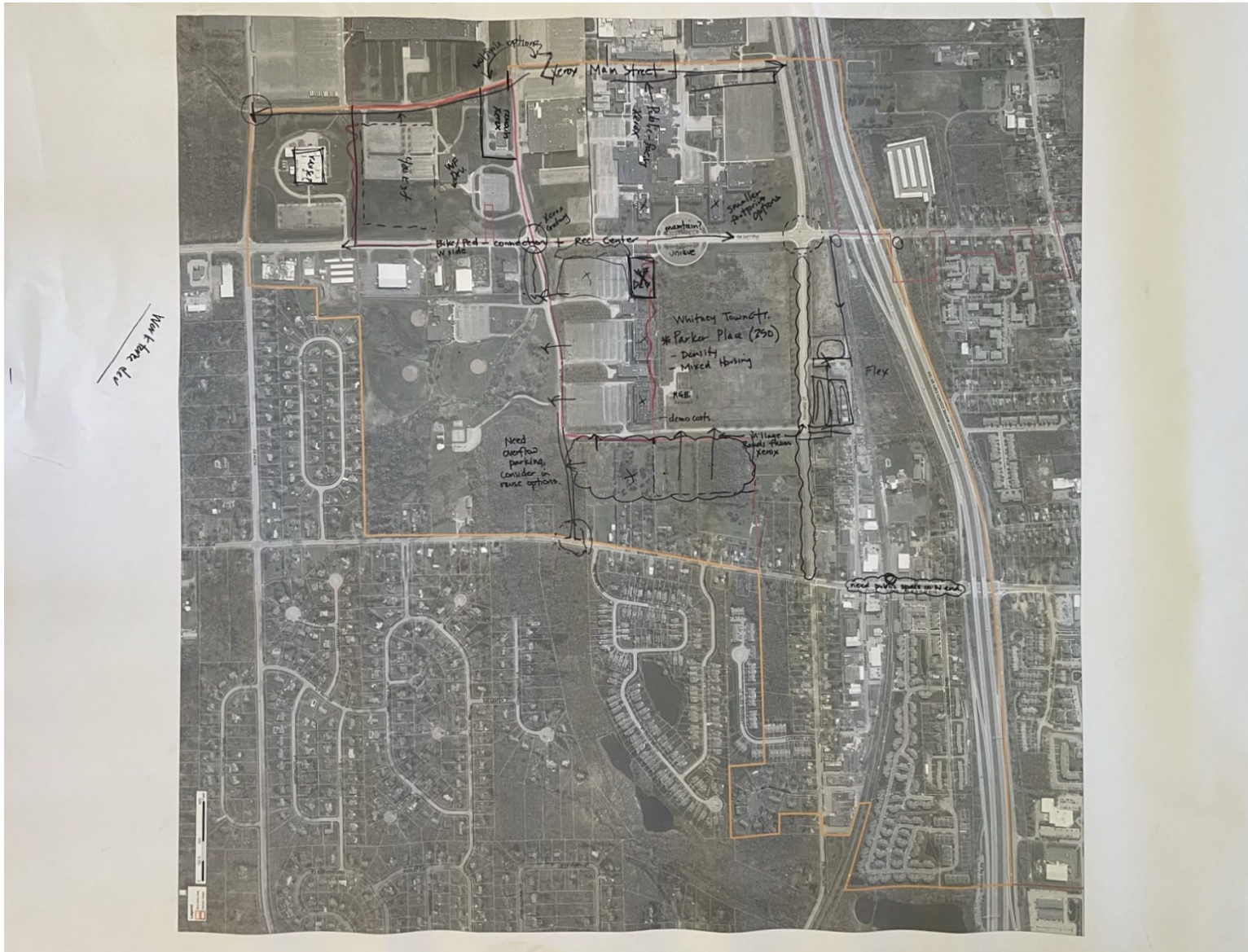
- Kimberly Baptiste, Bergmann
- Katie Darcy, Bergmann
- Gary Flisnik, Bergmann
- Greg Andrus, Lu Engineers
- Dan Stevens, Camoin Associates
- Sue Steele, SSLA
- Matt Chatfield, WEDA
- Tom Flaherty, Town of Webster
- Josh Artuso, Town of Webster
- Melissa Keller, NYS DOS
- Bill Karpen, Xerox
- John Barrett, Xerox
- Bill Horeth, Kittelberger Florist
- Elena Bernardi, Webster BID

Katie Darcy kicked off the meeting by reviewing the meeting's agenda and discussing some of the outcomes of the recent engagement activities conducted. Dan Stevens then presented the outcomes of the market analysis, identifying the key opportunities for the study area. The majority of the meeting was spent reviewing the strategic sites, and conducting break-out sessions in which committee members discussed each of the strategic sites and their potential re-use opportunities, as well as overall area-wide improvement strategies. The meeting adjourned at 10:30 AM. Images of the results of the visioning session are depicted on the following page, as well as a summary of the key discussion points of the meeting.

Additional Notes

- Development at the Donovan Street Focus Area should focus on connections to the Hojack Trail.
- Streetscape enhancements in the Commercial Street Focus Area could involve different paving surfaces, such as cobblestone to enhance the area's sense of place.
- There is a lack of roadway definition in the Commercial Street Focus Area.
- The BID often closes off roadways from vehicular traffic for their events – it could be useful for the BID to have a similar space that is easily blocked off to traffic within the study area.
- Strategic Site 4 could be used for science / research center and/or and incubator space.
- The parking lot south of Strategic Site 2 should be included within the site area.

Area-Wide Improvement Strategies – Group 1



NEXT STEPS

- The project team will be conducting an open house session with the Webster Chamber of Commerce members on June 13th.
- The project team will have a table at the June 10th Summer Celebration Event at the Webster Parks & Recreation Center.
- The draft Market Analysis will be distributed to the Committee in June.
- A draft Inventory and Analysis document will be distributed to the Committee in July.
- The project team will begin development draft Vision and Goals and a Future Land Use plan based on additional community input received at the June engagement events.



VILLAGE OF WEBSTER REIMAGINE WEBSTER

Steering Committee Meeting #4
Thursday, August 4, 2023

MEETING SUMMARY

The fourth committee meeting for the Reimagine Webster BOA Nomination Study was held on Thursday, August 4, 2023 at 8:30 AM. The purpose of the meeting was to discuss the project status, and to conduct a master planning interactive exercise with committee members. Attendees included:

- Kimberly Baptiste, Bergmann
- Katie Darcy, Bergmann
- Sue Steele, SSLA
- Matt Chatfield, WEDA
- Jake Swingly, Village of Webster
- Danielle Kruger, Village of Webster
- Darrell Byerts, Village of Webster
- Jerry Ippolito, Village of Webster
- Tom Flaherty, Town of Webster
- Josh Artuso, Town of Webster
- Bill Karpen, Xerox
- John Barrett, Xerox
- Bill Horeth, Kittelberger Florist
- Elena Bernardi, Webster BID

Katie Darcy kicked off the meeting by reviewing the meeting's agenda and discussing some of the outcomes of the recent engagement activities conducted. She then gave a brief recap of the market findings from the previous committee meeting as a preface to the master planning exercise. The majority of the meeting was dedicated to conducting the master planning exercise. A set of potential development concepts were presented for each strategic site, and then attendees were asked to create their own desired master plan by using "puzzle pieces" of the development concepts for each of the strategic sites attached to the overall study area map. Each committee member present then presented their preferred development scenario. Streetscape concepts were then presented for Philips Road, Commercial Street, and Donovan Street – and committee members were asked to vote on their preferred concepts.

The meeting adjourned at 10:30 AM. An image of the master planning exercise is depicted on the following page, as well as a summary of some of the development preferences discussed.

Strategic Site #1

- The existing building should be maintained, and potentially expanded upon.

Strategic Site #2

- Should this site be left as shovel ready?
- Utility bills needs to be able to be separated out from Xerox.
- The existing building should be maintained, and potentially expanded upon.



Strategic Site #3

- Buildings should be pushed slightly farther back from the road.
- We need to be mindful of the interplay between this site and Strategic Site #4.
- Is some re-use possible of existing buildings?
- There should be an access road off Phillips Road.

Strategic Site #4

- A mix between the highest and second highest density would be preferred.
- There should be connectivity and additional parking for the recreation center on this site.
- The existing parking spaces should be maintained for events, and capitalized on year-round.
- There should be no single-family development on this site.

Strategic Site #5

- This site should incorporate supportive businesses for Site #4.

NEXT STEPS

- The project team will create revised development concepts based on the feedback from the meeting.
- “Phase 2” of the master planning exercise will be conducted at the next committee meeting, including streetscapes, gateways, transitional areas, amenities, and connectivity – to be scheduled for late September.
- The next round of public engagement will be conducted in mid to late Fall.

VILLAGE OF WEBSTER REIMAGINE WEBSTER

Steering Committee Meeting #5

Tuesday, October 3, 2023

MEETING SUMMARY

The fifth committee meeting for the Reimagine Webster BOA Nomination Study was held on Tuesday, October 3, 2023 at 8:30 AM. The purpose of the meeting was to discuss the project status, and to conduct a master planning interactive exercise with committee members. Attendees included:

- Kimberly Baptiste, Bergmann
- Katie Darcy, Bergmann
- Sue Steele, SSLA
- Matt Chatfield, WEDA
- Jake Swingly, Village of Webster
- Tom Flaherty, Town of Webster
- Josh Artuso, Town of Webster
- Bill Karpen, Xerox
- John Barrett, Xerox
- Elena Bernardi, Webster BID

Kimberly Baptiste began by reviewing the meeting's agenda and discussing some of the recent work completed for the project. The remainder of the meeting was spent conducting the second part of the Master Planning exercise that began during the last committee meeting. During the second phase of this planning exercise, the consultant team presented the revised strategic site redevelopment concepts based on the feedback received during the August committee meeting, as well as some representative imagery. Then, the discussion turned towards the additional pieces of the master plan yet to be developed, including the intersection treatments and gateways that should be incorporated, any amenities the committee would like to see in the study area, and connectivity for motorists, bicyclists, and pedestrians. A discussion was held surrounding placemaking ideas, site furnishings, wayfinding, and public art. The meeting adjourned at 10:00 AM.

NEXT STEPS

- The project team will create a complete draft of an area-wide master plan based on the discussion today.
- The next round of public engagement will be conducted in October and/or November.

VILLAGE OF WEBSTER REIMAGINE WEBSTER

Steering Committee Meeting #6

Tuesday, October 31, 2023

MEETING SUMMARY

The sixth committee meeting for the Reimagine Webster BOA Nomination Study was held on Tuesday, October 31, 2023 at 8:30 AM. The purpose of the meeting was to review the complete Master Plan draft concepts, and solicit any final feedback before presenting the concepts to the general public. Attendees included:

- Kimberly Baptiste, Bergmann
- Katie Darcy, Bergmann
- Sue Steele, SSLA
- Matt Chatfield, WEDA
- Jake Swingly, Village of Webster
- Tom Flaherty, Town of Webster
- Josh Artuso, Town of Webster
- Bill Karpen, Xerox
- John Barrett, Xerox
- Jonathan Nwagbaraocha, Xerox
- Elena Bernardi, Webster BID
- Bill Horeth, Kittelberger Florist

The meeting began with a presentation of the two overall master plan concepts – the difference being between the level of density on the northern end of Strategic Site 4. Each of the strategic site concepts were presented briefly, alongside the estimated total square footage of development envisioned for each concept. The majority of the discussion surrounded Strategic Site 4, and the inclusion of a potential green space to be owned and operated privately, but building upon the programming at the Recreation Complex to the north. The meeting adjourned at approximately 9:30 AM.

NEXT STEPS

- A public open house will be held on November 15th, 6-8 PM at the Webster Recreation Center.
- The project team will begin to draft the complete BOA nomination study, which will be reviewed at the next committee meeting.

VILLAGE OF WEBSTER REIMAGINE WEBSTER

Pop Up Event – Community Arts Day
Saturday, April 15, 2023

EVENT SUMMARY

The Reimagine Webster project team hosted a booth at the Webster School District’s Community Arts Day from 10 AM – 2 PM on April 15, 2023, as one of its first engagement opportunities. The purpose of the event was to spread awareness of the project and solicit feedback regarding potential improvements residents would like to see in the study area. Hundreds of community members attended the overall event, and approximately 50 +/- individuals stopped by the Reimagine Webster Booth.



Feedback Summary

Votes for Various Potential Improvements in the Reimagine Webster Study Area:

Streetscape Enhancements

- Planters: 5
- Public Art: 5
- Pedestrian-Scaled Lighting: 3
- Enhanced Crosswalks: 2

Residential Development

- Senior Living: 3
- Townhomes: 2
- Single Family Homes: 1
- Multi-Family Dwellings: 0

Trail Improvements

- Trail Signage: 5
- Trailhead Enhancements: 2
- Bike Stations: 2
- Trail Crossings: 2

Public Space & Park Improvements

- Community Gardens: 12
- Public Plazas / Seating Areas: 8
- Playgrounds / Splash Pads: 7
- Sports Fields:

Additional Community Visions for the Future:

- Town Pool
- Breweries
- Sidewalks (3x)
- Indoor Sports (Lacrosse, football, cheer)
- Public Dog Park
- Pickleball Courts
- Improve and clean up Charles E. Sexton Memorial Park
- Improve Signage for right of way onto Route 104 from Phillips Road
- Deer Management

VILLAGE OF WEBSTER REIMAGINE WEBSTER

Pop Up Event – Summer Celebration
Saturday, June 10, 2023

EVENT SUMMARY

The Reimagine Webster project team hosted a booth at the Webster Parks and Recreation Department's Summer Celebration Event from 4 PM – 7:30 PM on June 10, 2023, as an engagement opportunity to capitalize on an existing community event. The purpose of the event was to spread awareness of the project and solicit feedback regarding potential improvements and development typologies residents would like to see in the study area. Over 6,500 community members attended the overall event, and approximately 50 +/- individuals stopped by the Reimagine Webster Booth.



Feedback Summary

Votes for Various Potential Public Space Improvements in the Reimagine Webster Study Area:

Streetscape Enhancements

Public Art: 5
Planters: 1
Pedestrian-Scaled Lighting: 1
Enhanced Crosswalks: 1

Trail Improvements

Trail Crossings: 2
Trail Signage: 1
Trailhead Enhancements: 1
Bike Stations: 1

Public Space

Farmers Market: 11
Public Plazas: 3
Seating Areas: 3
Community Gardens: 1

Park Improvements

Splash Pads: 8
Outdoor Venue / Amphitheatre: 8
Indoor Sports Facilities: 5
Seating Areas: 3

Votes for Various Potential Development Typologies in the Reimagine Webster Study Area:

Commercial Development

Drive Through Restaurants: 1
Retail Development: 1
Professional Office Space: 0
Fueling Stations: 0

Mixed-Use Development:

Town Center: 4
Horizontal Mixed-Use: 2
Vertical Mixed-Use: 2
Live-Work Development: 1

Residential Development

Senior Living: 1
Townhomes: 1
Single Family Homes: 0
Multi-Family Dwellings: 0

Industrial Development

Warehousing: 0
Self-Storage: 0
Light Industrial / Research: 0
Mixed-Use Industrial: 0

Additional Desired Improvements / Development in the Study Area:

- Sidewalks on busy roads for bikers
- Sports Stores
- Senior Housing
- Trampoline Parks
- Chik-fil-A
- Ice Cream Shops
- Indoor & Outdoor Youth Spaces
- More Biking Trails
- Mountain Biking / BMX Pump Track (2x)

VILLAGE OF WEBSTER REIMAGINE WEBSTER

Webster Chamber of
Commerce Open House Event
Tuesday, June 13, 2023

EVENT SUMMARY

The Reimagine Webster project team hosted the Webster Chamber of Commerce's monthly Eat, Drink, and Connect event on Tuesday, June 13th

from 4:30 – 6:30 PM, where members of the Chamber of Commerce were invited to come learn about the Reimagine Webster initiative and provide their input for desired future investment in the study area. Presentation boards were displayed around the room depicting some of the preliminary Inventory & Analysis findings as well as boards soliciting feedback on desired types of public and private investment. In addition, maps of each identified strategic site and focus area were placed on tables around the room for attendees to draw on with their ideas. Approximately 38 Chamber members were in attendance.



Feedback Summary

Votes for Various Potential Public Space Improvements in the Reimagine Webster Study Area:

Streetscape Enhancements

Public Art: 7
Planters: 4
Pedestrian-Scaled Lighting: 3
Enhanced Crosswalks: 1

Trail Improvements

Trail Crossings: 10
Bike Stations: 6
Trail Signage: 5
Trailhead Enhancements: 2

Public Space

Farmers Market: 5
Public Plazas: 2
Seating Areas: 1
Community Gardens: 1

Park Improvements

Outdoor Venue / Amphitheatre: 14
Indoor Sports Facilities: 2
Splash Pads: 1
Seating Areas: 0

Votes for Various Potential Development Typologies in the Reimagine Webster Study Area:

Commercial Development

Retail Development: 3
 Professional Office Space: 1
 Drive Through Restaurants: 0
 Fueling Stations: 0

Residential Development

Townhomes: 2
 Single Family Homes: 2
 Multi-Family Dwellings: 2
 Senior Living: 1

Mixed-Use Development:

Town Center: 5
 Horizontal Mixed-Use: 2
 Vertical Mixed-Use: 1
 Live-Work Development: 0

Industrial Development

Light Industrial / Research: 7
 Mixed-Use Industrial: 5
 Warehousing: 2
 Self-Storage: 0

Focus Area 2 Comments:

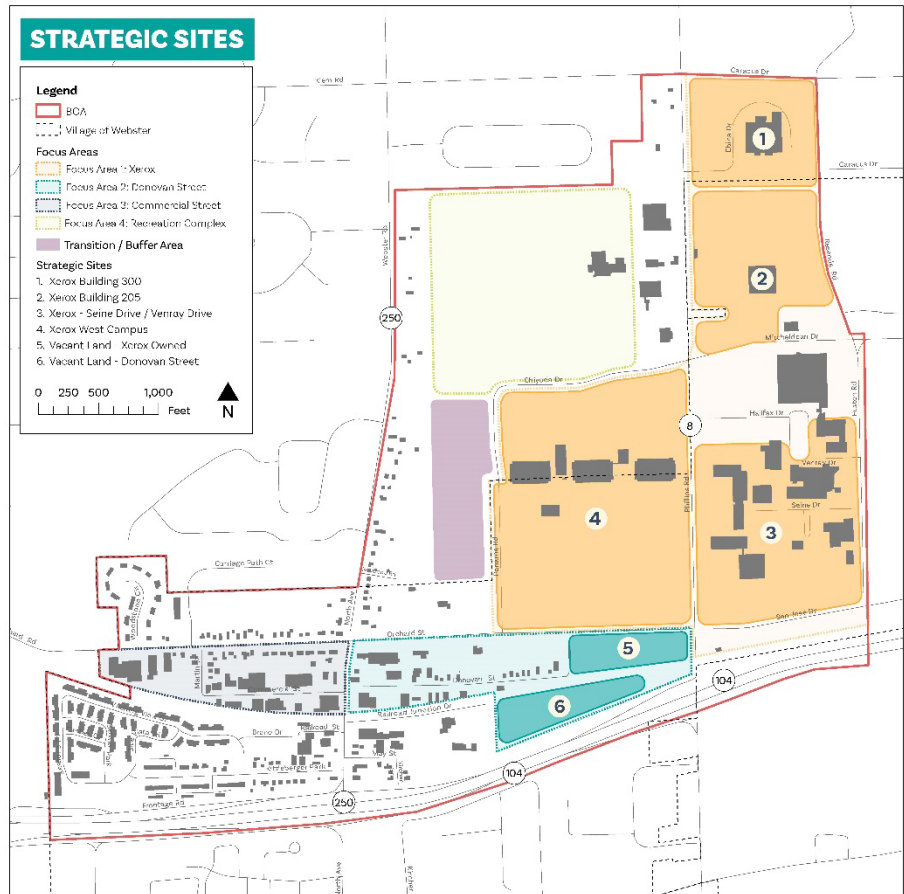
- New DPW building for Village of Webster
- Amphitheater
- Brewery
- Distillery
- Winery
- Arts – theatre
- Cafe

Strategic Site 3 Comments:

- Bike Trails
- Indoor performance Center – theatre / stage / venue
- Speed divots (vs. Bumps) – keep people safe
- Retail

Strategic Site 4 Comments:

- Part of this site could be used for a new DPS building for the Village of Webster.
- Mixed use – Town Center
 - Condos, retail, hotel, housing, restaurants, coffee shops, entertainment destination
- Outdoor event / amphitheater space



Area-Wide Comments:

- Commercial space for purchase
- Better wayfinding (especially for parking)
- Mid-size commercial space
- Mid-crossing crosswalk signs
- Parking is hard in the village
- Study area should support starter homes
 - 2 bedrooms
 - Cape cods
 - Supports young families
- Route 104 Trail surface is in poor condition – would prefer stone dust surfacing
- Support shared space for small businesses



VILLAGE OF WEBSTER REIMAGINE WEBSTER

Public Open House

Wednesday, November 15, 2023

EVENT SUMMARY

The Reimagine Webster project team hosted a public open house at the Town Recreation Center on Wednesday, November 15th from 6:00 – 8:00 PM. Attendees were invited to come learn about the Reimagine Webster



initiative and provide their input on the draft Master Plan concepts and what types of development and amenities they would like to see in the study area in the future. Presentation boards were displayed around the room presenting the work conducted thus far, including the inventory and analysis of existing conditions, the market analysis, and other relevant plans and studies. Additional boards presented the draft redevelopment concepts for the Strategic Sites identified within the study area, and asked attendees to vote on the type and density of development they would like to see – as well as any additional public realm enhancements or amenities. In addition, large printouts of the draft Master Plans were placed on tables around the room for attendees to draw on with their ideas. Approximately 25 community members were in attendance.

Feedback Summary

Overall Master Plan Concept Improvements:

- Widen path around the recreation center (2x)
- Add after dark lighting to walking paths and hiking trails (2x)
- Add dog park (2x)
- Love the concept of more bicycle and walking paths.
- Do not allow the development of buildings taller than two stories.
- Keep as much grass and trees as possible.
- Take 1-2 empty buildings and in them into indoor hydro/aqua vertical gardens for the community.
- Add tennis / soccer / baseball fields
- Need to buffer both sides of the Hojack Trail from existing and new development (2x).
- Enhance the visibility of the Hojack Trail from Philips Road – potentially add new parking?
- Relocate the Bird Sanctuary Trail crossing at Route 250 to align with the Chiyoda Drive extension (2x).
- Jog the roadway connect at Panama Road and Chiyoda Drive
- Create a dedicated bike and pedestrian trail along Micheldean Drive from the Recreation Center to Salt Road, and along the proposed Chiyoda Drive extension to connect to Route 250.



Let us know your thoughts on this master plan concept by placing a sticky note on the map or writing comments in the space below.

Widen path around the recreation center add softer dusk lighting.

dog Park?

dog parks

Take 1-2 Empty Bldgs - turn into indoor

Hydro-Aqua-Ventil gabers

Ways as Hiking trails

Tennis/ Soccer/Basketball (steel)

KEEP OP WALKWAY FROM RAILROAD REC CENTER

Strategic Site 4 Improvements:

Votes for Housing Types:

- Ranch Townhomes: 4
- Two Story Townhomes: 3
- Two Story Apartments: 3
- Four Story Apartments: 2
- Three Story Townhomes: 1
- Three Story Apartments: 0

Votes for Site Amenities:

- Gateways: 5
- Wayfinding: 5
- Plaza / Gathering Space: 4
- Multimodal Connections: 4
- Green Infrastructure: 3
- Large Green Space: 3
- Interactive Art: 1
- Commercial Establishments: 1

General Comments:

- Need to buffer the Hojack Trail from any new commercial development
- Separate walk and bike ways
- No more housing – more trees, hiking trails, and open space
- Move the commercial development on the north end of the site to Orchard Street.

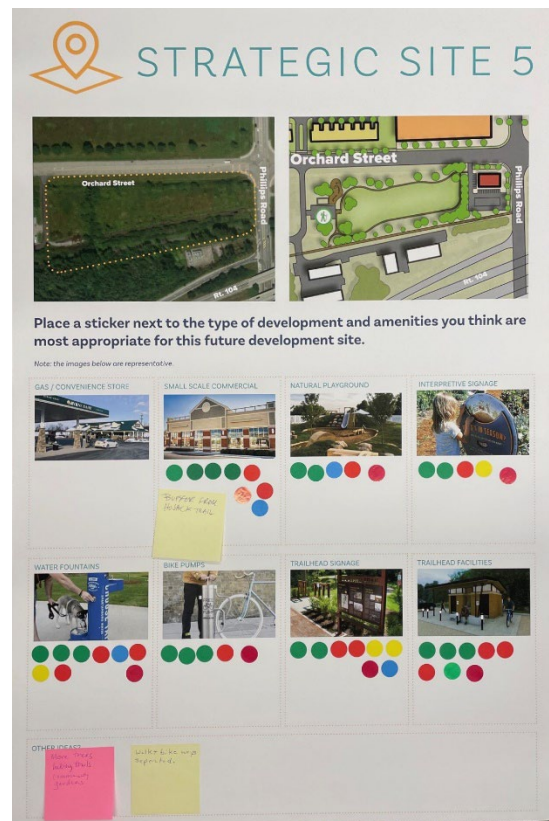
Strategic Site 5 Improvements:

Votes for Development Types / Amenities:

- Water Fountains: 9
- Small-Scale Commercial: 8
- Trailhead Signage: 8
- Trailhead Facilities: 8
- Natural Playground: 5
- Interpretive Signage: 5
- Bike Pumps: 5
- Gas/Convenience Store: 0

General Comments:

- Need to buffer the Hojack Trail from any new commercial development
- Separate walk and bike ways
- More trees, hiking trails, and community gardens



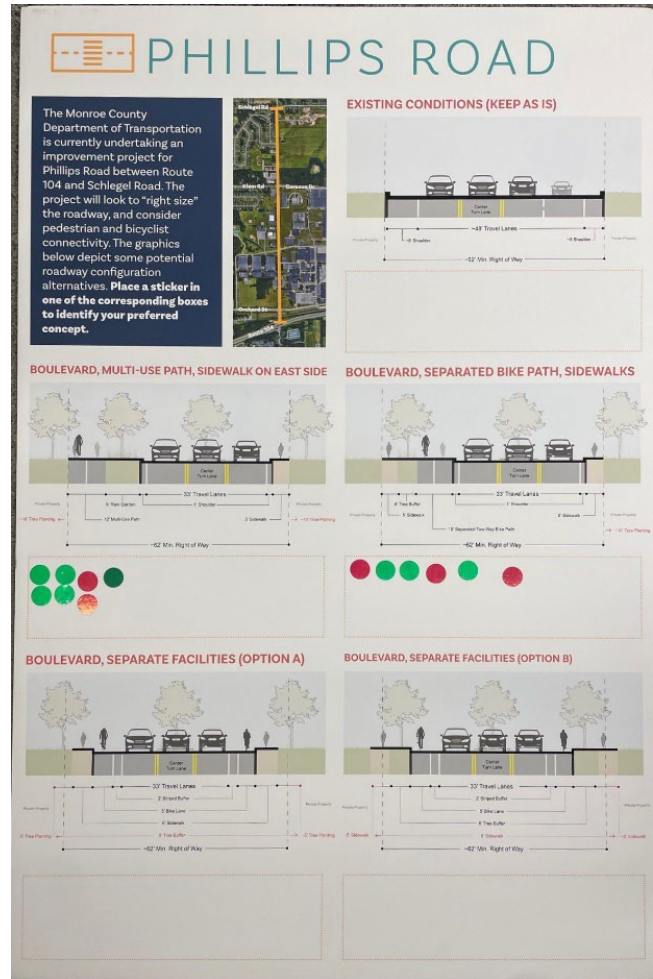
Recreation Complex Improvements:

- Pool
- Update the inside of the Recreation Complex
- Wood Basketball Court – “Home of North Coast”
- Youth Sports
- More trees
- Walkways
- Starbucks-like café – comfy place for teens and adults
- More electric car chargers
-

Phillips Road Improvements:


Votes for Alternative Alignments:

- Boulevard, Multi-use Path, Sidewalk on East Side: 7
- Boulevard, Separated Bike Path, Sidewalks: 6
- Boulevard, Separate Facilities (Option A): 0
- Boulevard, Separate Facilities (Option B): 0
- Existing Conditions (Keep as is): 0



Placemaking and Connectivity Improvements:

- Lighting all over
- Street crossing signals for walkers
- More trees
- Walking /biking paths
- Cute shops – think of Pittsford / Schoen Place / Fairport (2x)
- Sidewalks
- Space for art installs
- Coffeehouse
- "Webster" stores
- Fun things for teenagers
- Paved roads
- Better business fronts



REIMAGINE WEBSTER

TELL US WHAT YOU THINK!

Take a moment to share your thoughts on recommendations for the Commercial & Donovan Street corridors and for placemaking & connectivity throughout the BOA study area.

PLACEMAKING & CONNECTIVITY

Are there additional amenities that you would like to see incorporated in the study area?

Are there additional shared-use connections or trailhead locations that should be considered within the study area?

WRITE ANSWERS HERE!

Lighting all over
Street crossing signals for walkers

More trees

Walking /biking paths

Cute shops - think of Pittsford / Schoen Place / Fairport (2x)

Sidewalks

Space for art installs

Coffeehouse

"Webster" stores

Fun things for teenagers

Paved roads

Better business fronts

WRITE ANSWERS HERE!

CORRIDOR ENHANCEMENTS

What other improvements would you like to see on Commercial & Donovan Streets?

WRITE ANSWERS HERE!