

Housing Needs Assessment & Market Analysis Genesee County, NY

FINAL REPORT

Submitted to:

Genesee County

Prepared by

URBAN PARTNERS

123 S. Broad Street, Suite 2042
Philadelphia, PA 19109

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1. Study Background

‘Gentle Hills & Fields of Green’ describes Genesee County, situated in the picturesque region of Western New York. The county is composed of 13 Towns, eight Villages, one City, and one Indian reservation, portions of which extend into Erie and Niagara Counties. Equidistant to the Cities of Buffalo and Rochester, and connected by the New York State Thruway, Genesee County enjoys a highly accessible location with convenient proximity to both metropolitan areas. Batavia—the county seat and geographic center—is Genesee County’s urban hub, providing the majority of the county’s employment, commercial, and residential activity. The smaller villages dot the landscape, supplying localized goods and services to the surrounding towns. The remainder of the county is largely rural and agricultural, defined more by its farms and rolling hills, though certain locations are poised for commercial growth. As a result, Genesee County exhibits diverse economic, demographic, and physical characteristics.

To achieve sustainable growth, the County acknowledges the importance of comprehending its present and future housing conditions, along with unmet housing demand, in alignment with its economic development objectives. As part of its on-going effort to promote a balanced housing market, the County commissioned this Housing Needs Assessment and Market Analysis update and retained Urban Partners as a consultant to undertake the study. The update aims to enhance the understanding of existing and future housing market and resident needs among housing providers, developers, municipalities, Genesee County agencies, and non-profit organizations. This information will be used to update municipal comprehensive plans and help guide the development community to bring project proposals to the County and partner municipalities that are appropriate and necessary to meet the demand.

Figure 1: View of Downtown Batavia



Photo Credit: University of Vermont Street Tree Inventory

Glossary of Housing Terms

The following are housing terms used throughout this document.

- **Affordable:** housing is generally considered affordable if the occupant is paying no more than 30 percent of gross income for housing costs, including utilities.
- **American Community Survey (ACS):** a national survey by the U.S. Census Bureau that collects information such as age, race, income, commute time to work, home value, veteran status and other important household data. It is collected more regularly than the Decennial Census but has a larger margin of error because it's derived from a smaller sample.
- **Cost burden:** policymakers and advocates consider a household “cost burdened” if more than 30% of their income goes towards housing costs. Being housing cost burdened is an indicator that a household may be unable to afford other critical and nondiscretionary costs such as health and childcare, education, food, and transportation.
- **Decennial Census:** undertaken by the U.S. Census Bureau every ten years ending in zero. It provides a count of the population and housing units for the entire United States. Its primary purpose is to provide the population counts that determine how seats in the U.S. House of Representatives are apportioned between the states.
- **Group Quarters:** places where people live or stay in a group living arrangement. Examples include group homes, nursing homes, university student housing (e.g., residence halls, fraternity/sorority houses), and correctional facilities.
- **Household:** all the people who occupy a housing unit. A household includes the related family members and all the unrelated people. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household.
- **HUD:** the [Department of Housing and Urban Development](#) (HUD) is a cabinet department in the executive branch of the U.S. federal government that supports community development and homeownership. HUD enforces the Fair Housing Act and offers housing assistance through the Community Development Block Grant, Housing Choice Voucher program, and other programs.
- **Housing Subsidy:** policy tool designed to make the cost of housing affordable to low-income households. The most common housing subsidies include the [Low-Income Housing Tax Credit](#), [Housing Choice Vouchers](#) (also known as Section 8 Vouchers), and [HUD Section 202 Supportive Housing for the Elderly](#). Developments that utilize these subsidies are required to rent to low-income households (usually below 50% or 60% of the AMI).
- **New York State Housing Finance Agency:** [HFA](#) is the state housing agency that administers and allocates various state and federal housing assistance programs, such as the Low Income Housing Tax Credits.
- **Market-Rate Housing:** homes offered at the prevailing cost (rent or sale price) for the local market. It is set by the landlord/seller without restrictions.

- Workforce Housing:** the Urban Land Institute defines it as housing affordable to households earning between 60 and 120 percent of area median income (AMI). Workforce housing targets middle-income workers which include professions such as police officers, firefighters, teachers, health care workers, retail clerks, and the like (Matthew J. Parlow, 2015).
- Zoning:** a planning control tool for regulating the built environment and creating functional real estate markets. It does so by dividing land that comprises the statutory area of a local authority into sections, permitting particular land uses on specific sites to shape the layout of towns and cities and enable various types of development. The purpose of zoning is to allow local and national authorities to regulate and control land and property markets to ensure complementary uses (The World Bank).

Area Median Income (AMI), 2024

The AMI is the estimated median income, adjusted for family size, by metropolitan area (or county, in nonmetropolitan areas). AMI is updated annually by HUD and used as the basis of eligibility for most housing assistance programs. For income-restricted rental communities that are subsidized by Low Income Housing Tax Credits and other government subsidies, the income cut-off is generally 50% or 60% of the AMI. The following table shows the 2024 AMI for Genesee County:

	1 person	2 person	3 person	4 person	5 person	6 person	7 person	8 person
Median Income 100% of AMI	\$64,500	\$73,700	\$82,900	\$92,100	\$99,500	\$106,900	\$114,300	\$121,600
Low Income 80% of AMI	\$51,600	\$59,000	\$66,350	\$73,700	\$79,600	\$85,500	\$91,400	\$97,300
60% of AMI	\$38,700	\$44,220	\$49,740	\$55,260	\$59,700	\$64,140	\$68,580	\$72,960
Very Low Income 50% of AMI	\$32,250	\$36,850	\$41,450	\$46,050	\$49,750	\$53,450	\$57,150	\$60,800
30% of AMI	\$19,400	\$22,150	\$24,900	\$27,650	\$29,900	\$32,100	\$34,300	\$36,500
Max Housing Costs for 80% AMI								
Maximum Annual Housing Cost	\$15,480	\$17,700	\$19,905	\$22,110	\$23,880	\$25,650	\$27,420	\$29,190
Maximum Monthly Rent/Mortgage	\$1,204	\$1,377	\$1,548	\$1,720	\$1,857	\$1,995	\$2,133	\$2,270
Maximum Mortgage Amount	\$112,364	\$137,059	\$161,586	\$186,114	\$205,802	\$225,491	\$245,180	\$264,869

** at current 30-year mortgage interest rates (7.5%), \$4,000 in property tax annually and \$600 in hazard insurance. Downpayment not factored.

Residential Housing Types

The following residential housing types are discussed throughout the report. Each of the housing types can be offered to the public as for-sale and/or for-rent products.



Single Family Detached



Duplex



Triplex - Stacked



Patio Homes



Cottage Home



Townhouse



Live-Work



Mid-Rise



High-Rise

2. Demographic Trends

A demographic analysis is a fundamental element of a housing needs assessment and determines how a local community is changing compared to regional trends. Specific elements of these trends include population and household characteristics, and income and poverty characteristics. Detailed analyses of the housing stock and housing market conditions will be discussed in subsequent sections of this study.

The primary data sources for this demographic analysis are the U.S. Census Bureau’s American Community Survey (ACS)—providing data based on calculated estimates for 2012 and 2022, the latest year for which detailed data is available for most demographic trends.

Figure 2: Genesee County Location



Source: U.S. Census Bureau

Population and Household Characteristics

The 2022 American Community Survey reported a total population of 58,204 for Genesee County, a decrease of 1,788 residents or 3.0% from 2012. In comparison, the Buffalo Metro Area—including the counties of Erie and Niagara—added 28,051 residents (a rate of 2.5%) from 2012 to 2022, while the Rochester Metro Area—including the counties of Livingston, Monroe, Ontario, Orleans, Wayne, and Yates—added 32,699 residents from 2012 to 2022, growing at a lower rate of 3.1% (see Table 1 below).

Table 1: Population Trends, 2012-2022

	2012 ACS	2022 ACS	Change (2012-2022)	% Change (2012-2022)
Genesee County	59,992	58,204	-1,788	-3.0%
Buffalo Metro Area	1,135,411	1,163,462	28,051	2.5%
Rochester Metro Area	1,054,160	1,086,859	32,699	3.1%

Source: U.S. Census Bureau, Urban Partners

As shown in Table 2 below, Genesee County’s household growth rate from 2012 to 2022 exceeded that of its population, adding 454 net new households, an increase of 1.9%. The growth of households for surrounding metro areas was faster than that of the county—a 6.2% increase for the Buffalo Metro Area and 8.1% for the Rochester Metro Area, both of which also exceeded population growth rates shown in Table 1.

Table 2: Household Trends, 2012-2022

	2012 ACS	2022 ACS	Change (2012-2022)	% Change (2012-2022)
Genesee County	23,962	24,416	454	1.9%
Buffalo Metro Area	468,522	497,529	29,007	6.2%
Rochester Metro Area	415,192	448,717	33,525	8.1%

Source: U.S. Census Bureau, Urban Partners

According to the ACS, Genesee County had 1.9% of its residents living in non-household group quarters in 2022, lower than the Buffalo Metro Area’s average of 2.5% and the Rochester Metro Area’s average of 3.9% (see Table 3)¹. 61.6% of all occupied housing units in the county are family households, compared to 58.1% for the Buffalo Metro Area and 60.4% for the Rochester Metro Area.

Table 3: Household Type by Relationship, 2022

	Genesee County	Buffalo Metro Area	Rochester Metro Area
Total Population	58,204	1,163,462	1,086,859
In Households	57,121	1,133,817	1,044,509
In Households (% of Total Population)	98.1%	97.5%	96.1%
In Family Households (% of Occupied Housing Units)	61.6%	58.1%	60.4%
In Non-Family Households (% of Occupied Housing Units)	38.4%	41.9%	39.6%
In Group Quarters (% of Total Population)	1.9%	2.5%	3.9%

Source: U.S. Census Bureau, Urban Partners

¹ The Census Bureau classifies all people not living in housing units (house, apartment, mobile home, rented rooms) as living in Group Quarters, of which there are two types: 1) Institutional, such as correctional facilities, nursing homes, or mental hospitals; and 2) Non-Institutional, such as college dormitories, military barracks, group homes, missions, or shelters.

In line with national trends, Genesee County reported an overall decrease in average household size from 2012 to 2022, shrinking from 2.45 to 2.34. Owner households decreased in size by 3.1% while renter households decreased at a greater rate of 10.5%. The Buffalo and Rochester Metro Areas similarly experienced a reduction, with Buffalo declining from 2.35 to 2.28 and Rochester 2.43 to 2.33 persons per household between 2012 and 2022. Owner and renter households in the state also decreased in both Metro Areas (see Table 4).

Table 4: Average Household Size, 2012-2022

	2012 ACS	2022 ACS	% Change (2012-2022)
Genesee County			
All Households	2.45	2.34	-4.5%
Owner Households	2.58	2.50	-3.1%
Renter Households	2.10	1.88	-10.5%
Buffalo Metro Area			
All Households	2.35	2.28	-3.0%
Owner Households	2.51	2.42	-3.6%
Renter Households	2.04	1.99	-2.5%
Rochester Metro Area			
All Households	2.43	2.33	-4.1%
Owner Households	2.57	2.47	-3.9%
Renter Households	2.13	2.03	-4.7%

Source: U.S. Census Bureau, Urban Partners

According to the Census, the ethnic/racial composition of Genesee County is majority White, though the county is growing less so. In 2022, 91% of Genesee County residents were White, followed by 4.6% two or more races, 3.5% Hispanic, 2.0% Black or African American, and 1.1% some other race. From 2012 to 2022, the percentage of non-White residents increased from 9.8% to 12.5%. Compared to the Buffalo and Rochester Metro Areas, Genesee County continues to maintain a less racially/ethnically diverse population (see Table 5).

Table 5: Ethnic/Racial Composition, 2012-2022

	Genesee County		Buffalo Metro Area		Rochester Metro Area	
	2012 ACS	2022 ACS	2012 ACS	2022 ACS	2012 ACS	2022 ACS
White Alone	92.9%	91.0%	81.7%	77.1%	81.5%	77.8%
Black or African American Alone	2.7%	2.0%	12.1%	11.8%	11.6%	11.2%
American Indian and Alaska Native Alone	0.9%	0.5%	0.6%	0.4%	0.3%	0.2%
Asian American Alone	0.6%	0.8%	2.4%	3.8%	2.6%	3.0%
Native Hawaiian & other Pacific Islander Alone	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Some other Race Alone	1.0%	1.1%	1.3%	2.1%	1.9%	2.5%
Two or More Races	2.0%	4.6%	1.8%	4.8%	2.1%	5.3%
Hispanic (All Races)	2.7%	3.5%	4.1%	5.5%	6.1%	8.1%

Source: U.S. Census Bureau, Urban Partners

Genesee County has a lower educational attainment level of residents over the age of 25 than the Buffalo and Rochester Metro Areas (see Table 6).

Table 6: Educational Attainment for Population 25 Years and Over, 2012-2022

	Genesee County		Buffalo Metro Area		Rochester Metro Area	
	2012 ACS	2022 ACS	2012 ACS	2022 ACS	2012 ACS	2022 ACS
Less Than 9th Grade	3.0%	2.7%	3.2%	2.9%	3.4%	3.4%
9th to 12th Grade, No Diploma	6.4%	4.8%	7.4%	5.0%	7.4%	5.4%
High School Graduate (Includes Equivalency)	37.8%	37.1%	30.4%	27.1%	27.5%	25.3%
Some College, No Degree	18.9%	17.4%	19.0%	18.0%	17.9%	16.7%
Associate's Degree	13.3%	14.9%	11.5%	12.3%	11.5%	12.3%
Bachelor's Degree	12.8%	13.5%	16.0%	19.4%	18.4%	20.4%
Graduate or Professional Degree	7.8%	9.7%	12.5%	15.3%	13.8%	16.5%

Source: U.S. Census Bureau, Urban Partners

Of the residents aged 25 and above in the county, 23.2% have bachelor's degrees or higher as the highest educational attainment, compared to 34.7% for the Buffalo Metro Area and 37% for the Rochester Metro Area. The percentage of residents with graduate/professional degrees increased by 1.9% in the county from 2012 to 2022, while it increased by 2.8% in the Buffalo Metro Area and 2.7% in the Rochester Metro Area.

According to the ACS and illustrated in Table 7 below, the largest age cohort in 2022 in Genesee County is adults aged 55 to 64 at 15.6%, followed by school-aged children (5 to 17 years old) at 15.2%. At the same time, in the Buffalo and Rochester Metro Areas, the largest cohort is school-aged children (5 to 17 years old) at 14.8% and 15.1%, respectively. The older adult cohort aged 55 to 64 is the second highest at 14.5% and 14.3%, respectively. The share of seniors in Genesee County increased from 15.7% in 2012 to 19.5% in 2022. The Buffalo Metro Area saw a lower increase from 15.9% in 2012 to 18.7% in 2022, while the Rochester Metro Area saw a higher increase from 14.2% to 18.5% over that same time period.

Table 7: Distribution of Age, 2012-2022

	Genesee County		Buffalo Metro Area		Rochester Metro Area	
	2012 ACS	2022 ACS	2012 ACS	2022 ACS	2012 ACS	2022 ACS
Under 5 Years-of-Age	5.6%	5.2%	5.3%	5.3%	5.6%	5.2%
5 To 17 Years-of-Age	16.5%	15.2%	16.2%	14.8%	16.9%	15.1%
18 To 24 Years-of-Age	9.2%	7.9%	10.3%	9.1%	10.9%	9.9%
25 To 34 Years-of-Age	11.0%	12.3%	11.7%	13.7%	11.6%	13.1%
35 To 44 Years-of-Age	12.8%	11.6%	12.3%	11.8%	12.6%	11.7%
45 To 54 Years-of-Age	16.4%	12.8%	15.5%	12.1%	15.4%	12.2%
55 To 64 Years-of-Age	12.8%	15.6%	12.9%	14.5%	12.7%	14.3%
65 To 74 Years-of-Age	8.0%	10.9%	7.8%	10.9%	7.3%	10.8%
75 To 84 Years-of-Age	4.9%	5.8%	5.7%	5.3%	4.6%	5.3%
85 Years-of-Age & Over	2.8%	2.7%	2.4%	2.6%	2.3%	2.4%

Source: U.S. Census Bureau, Urban Partners

Migration

To illustrate the patterns of households moving into (and out of) Genesee County, migration data published by the Internal Revenue Service (IRS) are examined in this section. This dataset is based on year-to-year changes reported on tax returns filed with the IRS, showing migration patterns by state or by county for the entire United States.² According to the IRS, the number of households moving into Genesee County decreased from 1,477 in 2017 to 1,183 in 2021. Over 40% of households moving into Genesee County are from Erie and Monroe Counties. Approximately 255 households moved from Erie County and 244 households moved from Monroe County to Genesee County in 2021, both decreases from 2017 (see Table 8).

Table 8: Annual Household In-Migration, 2017-2021

County of Origin	2017	%	2018	%	2019	%	2020	%	2021	%
Erie County	292	19.8%	248	21.0%	235	21.2%	242	20.6%	255	21.6%
Monroe County	308	20.9%	230	19.4%	200	18.1%	251	21.3%	244	20.6%
Wyoming County	187	12.7%	175	14.8%	158	14.3%	140	11.9%	130	11.0%
Orleans County	117	7.9%	73	6.2%	90	8.1%	82	7.0%	82	6.9%
Livingston County	69	4.7%	73	6.2%	57	5.1%	62	5.3%	71	6.0%
Niagara County	47	3.2%	40	3.4%	31	2.8%	49	4.2%	47	4.0%
Ontario County	23	1.6%	-	-	-	-	-	-	-	-
All Other Counties	434	29.4%	345	29.1%	337	30.4%	351	29.8%	354	29.9%
Total In-Migration	1,477		1,184		1,108		1,177		1,183	

Source: Internal Revenue Service, Urban Partners

Similar to the patterns of in-migration, Monroe County is the most frequent destination for households moving out of Genesee County (totaling 251 such households in 2021, compared to 244 households moving from Monroe County, see Table 9).

Table 9: Annual Household Out-Migration, 2017-2021

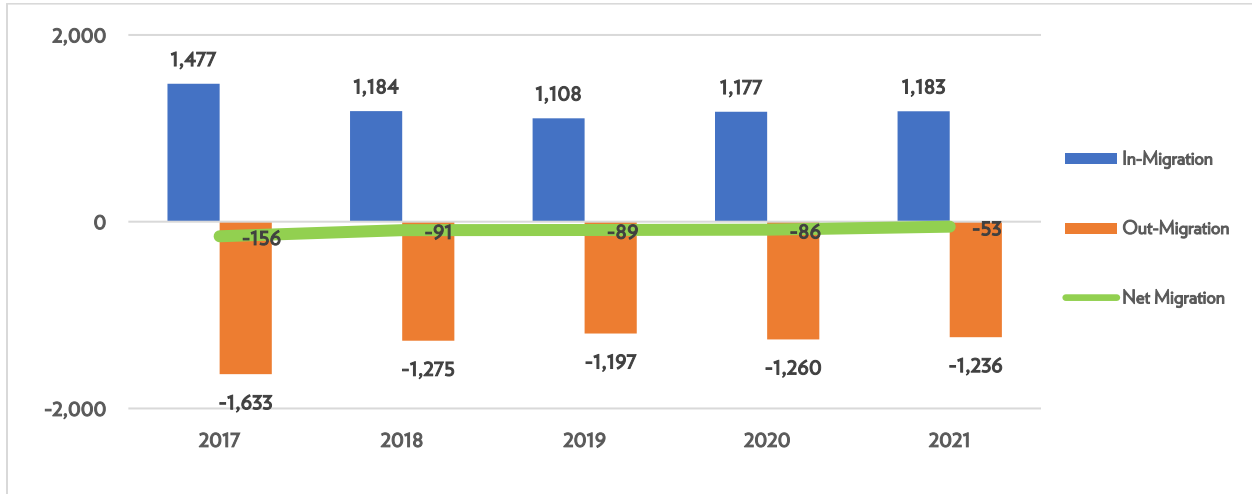
Destination County	2017	%	2018	%	2019	%	2020	%	2021	%
Monroe County	346	21.2%	293	23.0%	258	21.6%	246	19.5%	251	20.3%
Erie County	261	16.0%	237	18.6%	191	16.0%	201	16.0%	199	16.1%
Wyoming County	182	11.2%	119	9.3%	127	10.6%	148	11.8%	128	10.4%
Orleans County	89	5.5%	88	6.9%	70	5.9%	83	6.6%	90	7.3%
Livingston County	82	5.0%	64	5.0%	73	6.1%	74	5.9%	66	5.3%
Niagara County	44	2.7%	44	3.5%	57	4.8%	32	2.5%	34	2.8%
Ontario County	30	1.8%	-	-	25	2.1%	29	2.3%	-	-
Other flows	599	36.7%	430	33.7%	396	33.1%	447	35.5%	468	37.9%
Total Out-Migration	1,633		1,275		1,197		1,260		1,236	

Source: Internal Revenue Service, Urban Partners

² In this analysis, the number of returns is used as a proxy for the number of households.

Figure 3 illustrates the net migration pattern for Genesee County, considering the number of households moving into and out of the county. The resulting net migration is illustrated in a bar graph, which shows Genesee County’s net migration increasing from -156 in 2017 to -53 in 2021.

Figure 3: Household Net Migration for Genesee County, 2017-2021

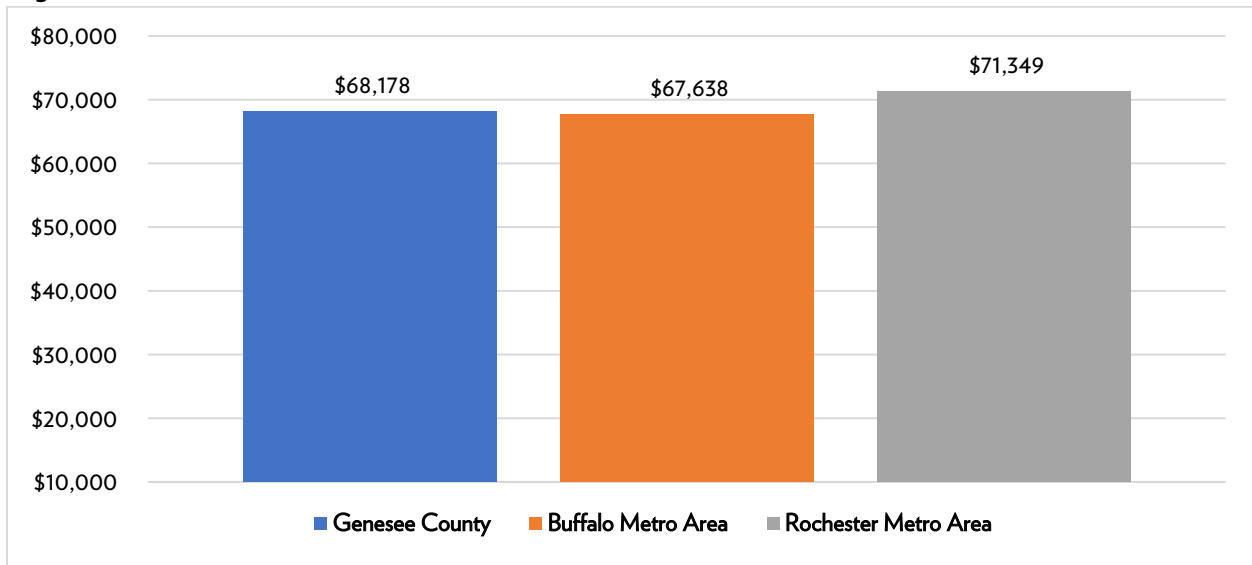


Source: Internal Revenue Service, Urban Partners

Household Income & Poverty Characteristics

As shown in Figure 4, Genesee County’s 2022 median household income of \$68,178 is slightly higher than the \$67,638 reported for Buffalo Metro Area, but lower than the Rochester Metro Area’s median household income of \$71,349.

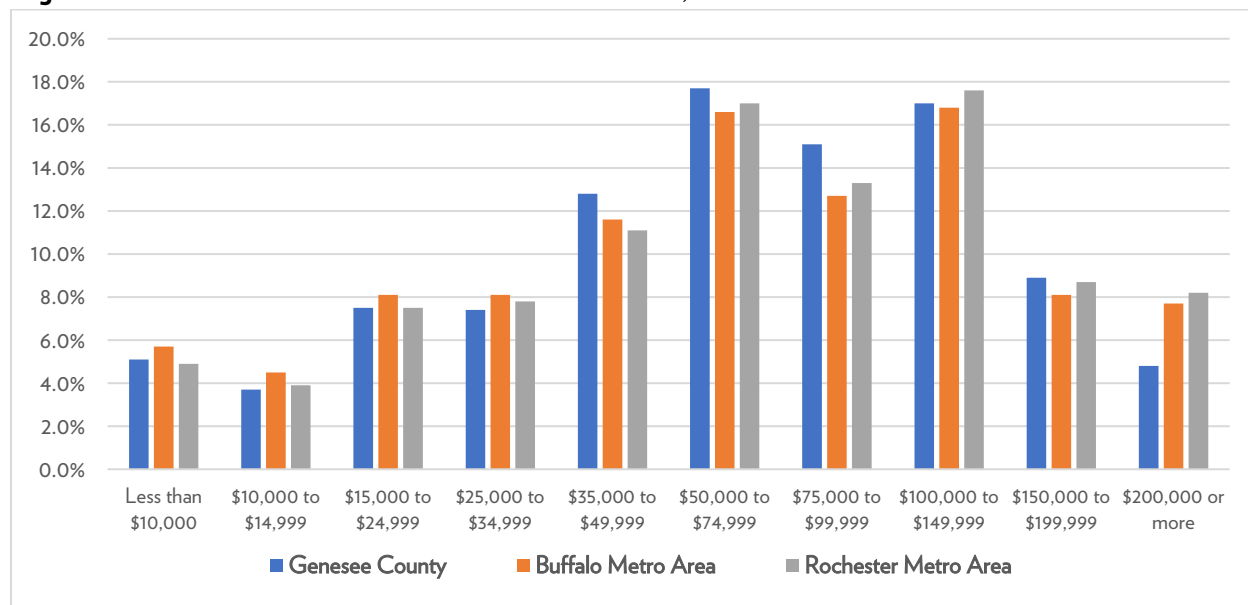
Figure 4: Median Household Income, 2022



Source: U.S. Census Bureau, Urban Partners

In Genesee County, 16.3% of the households earn less than \$25,000 annually, the same rate as the Rochester Metro Area and lower than the Buffalo Metro Area’s 18.3%. Over one-third (30.7%) of all Genesee County households earn more than \$100,000 annually, compared to 32.6% for the Buffalo Metro Area and 34.5% for the Rochester Metro Area (see Figure 5).

Figure 5: Distribution of Median Household Income, 2022



Source: U.S. Census Bureau, Urban Partners

According to the 2022 ACS, 5,974 Genesee County residents (or 10.4%) are living below the poverty level³, compared to higher rates in the Buffalo Metro Area (13.6%) and the Rochester Metro Area (12.7%; see Table 10).

Table 10: Population Living Below Poverty Level, 2022

	Genesee County	Buffalo Metro Area	Rochester Metro Area
Population Below Living Poverty Level	5,974	154,669	133,044
Population Below Living Poverty Level (%)	10.4%	13.6%	12.7%

Source: U.S. Census Bureau, Urban Partners

Asset Limited, Income Constrained, Employed (ALICE) Population

The ALICE (Asset Limited, Income Constrained, Employed) Project was developed by the United Way to bring focus to families and individuals who are employed but whose salaries do not provide sufficient resources to meet basic needs. Through a standardized methodology using publicly available census, employment, wage, cost of living, and other data, the ALICE project sheds light on the financial hardships of working households in Genesee County.

³ The federal poverty level is defined by the U.S. Department of Health and Human Services as \$27,750 for a 4-person household in 2022.

The United Way’s Household Survival Budget illustrates the bare minimum a household must earn to live and work in the modern economy. These costs include housing, childcare, food, transportation, health care, technology (a smartphone plan), and taxes. It does not include savings for emergencies or future goals like college or retirement. Table 11 shows the Household Survival Budget for Genesee County by household types.

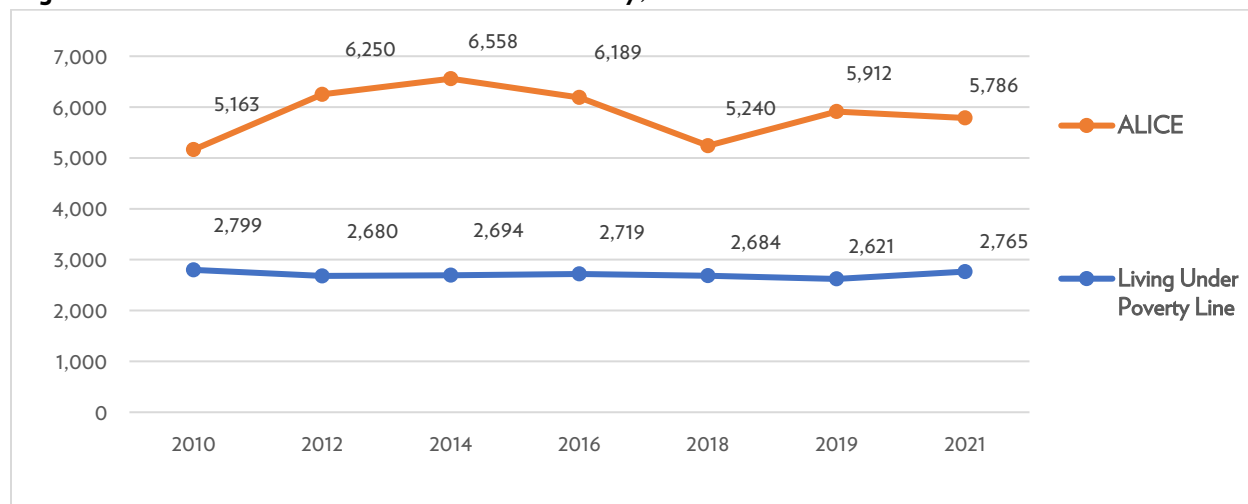
Table 11: Household Survival Budget for Genesee County, 2021

	Single Adult	Two Adults	Two Adults Two School-Aged Children	Two Adults Two Children in Childcare	Single Senior	Two Seniors
Housing	\$421	\$457	\$545	\$545	\$421	\$457
Child Care	\$0	\$0	\$703	\$1,979	\$0	\$0
Food	\$419	\$769	\$1,253	\$1,143	\$387	\$710
Transportation	\$358	\$535	\$835	\$835	\$311	\$441
Health Care	\$226	\$522	\$784	\$784	\$515	\$1,031
Technology	\$75	\$110	\$110	\$110	\$75	\$110
Miscellaneous	\$165	\$263	\$452	\$569	\$186	\$299
Taxes (Payments)	\$267	\$367	\$874	\$1,204	\$326	\$644
Taxes (Credits)	-	-	(\$1,393)	(\$1,865)	-	-
Monthly Total	\$2,085	\$3,262	\$4,455	\$5,596	\$2,375	\$3,931
Annual Total	\$25,020	\$39,144	\$53,460	\$67,152	\$28,500	\$47,172
Hourly Wage	\$12.51	\$19.57	\$26.73	\$33.58	\$14.25	\$23.59

Source: United Way ALICE Project

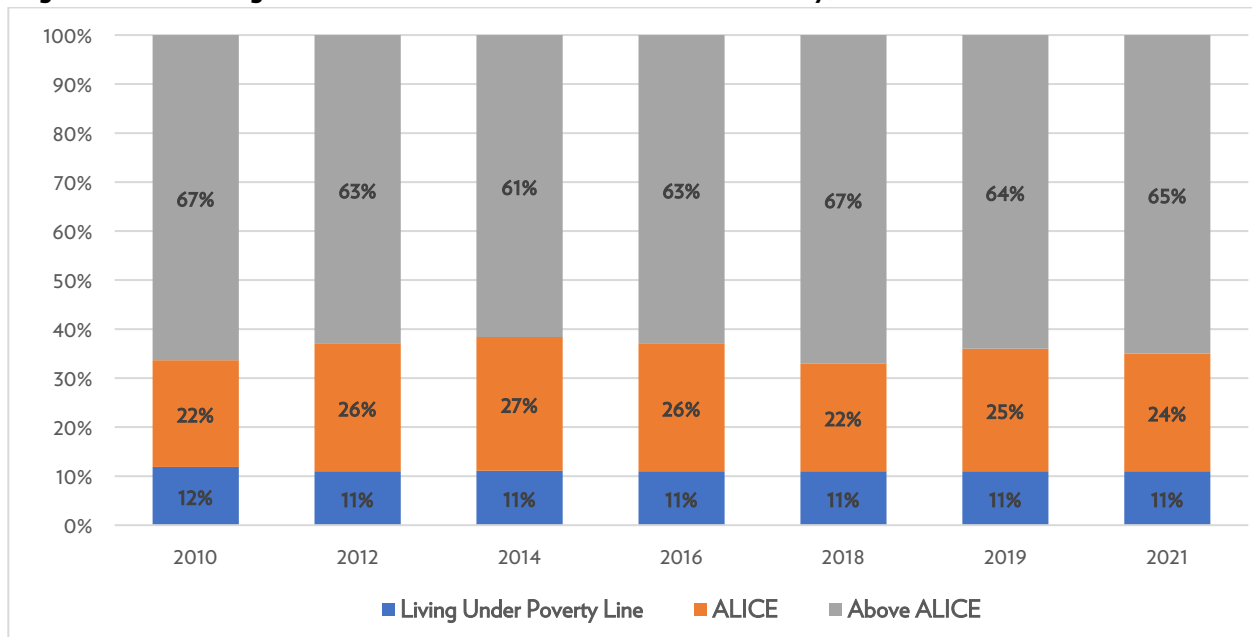
Households that earn above the federal poverty level but cannot afford the bare-bones survival budget are identified as ALICE. In 2021, 5,786 Genesee County households (24%) were identified as ALICE, up from 5,163 (or 22%) reported in 2010 (see Figures 6 and 7).

Figure 6: ALICE Households in Genesee County, 2010-2021



Source: United Way ALICE Project

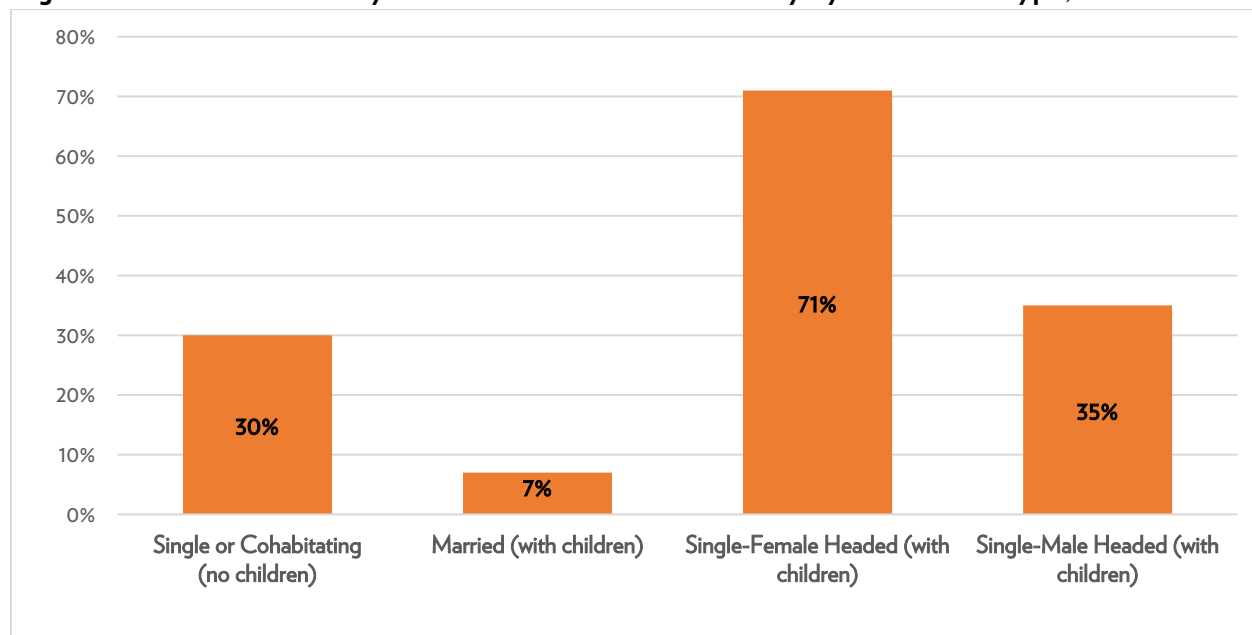
Figure 7: Percentage of ALICE Households in Genesee County, 2010-2021



Source: United Way ALICE Project

Figure 8 illustrates the ALICE levels for different types of Genesee County households. According to the United Way, 30% of single or cohabitating households, 35% of single-male headed (with children) households, and 71% of single-female headed (with children) households lived under the ALICE threshold.

Figure 8: ALICE and Poverty Households in Genesee County by Household Type, 2021



Source: United Way ALICE Project

Table 12 is a summary of households living under the ALICE threshold for the 15 census defined county subdivisions within Genesee County (the column detailing the percentage of households in poverty or ALICE is color coded to show the highest percentages in deeper red and the lowest percentages in deeper green). The Tonawanda Reservation has the highest percentage of ALICE households at 55%, followed by Batavia City at 42%.

Table 12: ALICE Households by County Subdivision, 2021

	Total Households	ALICE Households	Percent Below ALICE
Alabama Town	684	212	31%
Alexander Town	952	238	25%
Batavia City	7,091	2,978	42%
Batavia Town	2,946	1,119	38%
Bergen Town	1,216	365	30%
Bethany Town	623	218	35%
Byron Town	762	168	22%
Darien Town	1,118	358	32%
Elba Town	721	180	25%
Le Roy Town	3,350	1139	34%
Oakfield Town	1,212	412	34%
Pavilion Town	930	260	28%
Pembroke Town	1,754	544	31%
Stafford Town	908	254	28%
Tonawanda Reservation	194	107	55%

Source: United Way ALICE Project

Key Takeaways of Demographic Trends

Population Decline: Genesee County's population decreased by 3.0% from 2012 to 2022, contrasting with population growth in nearby Buffalo and Rochester Metro Areas.

Household Growth: Despite the population decline, the number of households in Genesee County increased by 1.9% over the same period.

Group Quarters: Genesee County had a lower percentage (1.9%) of residents living in group quarters compared to the Buffalo and Rochester Metro Areas.

Household Size Reduction: The average household size in Genesee County decreased from 2.45 to 2.34 between 2012 and 2022, with a more significant decline among renter households.

Racial/Ethnic Composition: The county is predominantly White (91%), but the percentage of non-White residents has increased slightly from 9.8% in 2012 to 12.5% in 2022.

Educational Attainment: Genesee County has lower educational attainment levels compared to the Buffalo and Rochester Metro Areas, with only 23.2% of residents holding a bachelor's degree or higher.

Aging Population: The proportion of seniors (65+) in Genesee County increased to 19.5% by 2022, higher than in the Buffalo and Rochester Metro Areas.

Migration Patterns: There has been a decrease in both in-migration and out-migration, with Monroe County being the most common destination and origin for household moves involving Genesee County.

Income Levels: The median household income in Genesee County is \$68,178, which is slightly higher than Buffalo Metro Area but lower than Rochester Metro Area. Around 10.4% of the population lives below the poverty line.

ALICE Households: Approximately 24% of households in Genesee County are classified as ALICE (Asset Limited, Income Constrained, Employed), indicating financial instability despite employment.

3. Housing Affordability by Income Segments

Using data available from the U.S. Department of Housing and Urban Development (HUD), this section examines the magnitude of Genesee County’s affordable housing challenge and benchmarks it against other counties in the region. Erie County (the City of Buffalo and the surrounding area) and Monroe County (the City of Rochester and the surrounding area) were selected for comparison.

Household Income Categories

Within Genesee County, HUD publishes the Area Median Income (AMI) annually. There are three categories of household income that are most relevant in terms of affordable housing:

- **Low-Income:** households earning less than 80% of AMI (this is the typical target group for affordable homeownership projects).
- **Very Low-Income:** households earning less than 50% of AMI (this is the typical target group for affordable rental projects, including affordable senior rental).
- **Extremely Low-Income:** households earning less than 30% of AMI (this is the most vulnerable segment consisting of households with little or no earned income).

Shown below in Table 13 are Genesee County’s income limits and income categories for 2020. It shows that a four-person household, for instance, is considered low-income if the annual household income is less than \$58,950 and very low-income if the household income is less than \$36,850 a year.

Table 13: Area Median Income by Category, Genesee County, 2020

Income Category	Household Size							
	1	2	3	4	5	6	7	8
Median Income (100%)	\$51,600	\$59,000	\$66,400	\$73,700	\$79,600	\$85,500	\$91,400	\$97,300
Low-Income (80%)	\$41,300	\$47,200	\$53,100	\$58,950	\$63,700	\$68,400	\$73,100	\$77,850
Very Low-Income (50%)	\$25,800	\$29,500	\$33,200	\$36,850	\$39,800	\$42,750	\$45,700	\$48,650
Extremely Low Income (30%)	\$15,500	\$17,700	\$19,900	\$22,100	\$23,900	\$25,650	\$27,450	\$29,200

Source: HUD

The data source for the analysis in this section is the Comprehensive Housing Affordability Strategy (CHAS) data published by HUD, the most recent of which was released in 2023⁴. The CHAS data combine the U.S. Census Bureau’s ACS with the Area Median Income to create estimates of the number of households that would qualify for HUD assistance. The CHAS data also incorporate household characteristics and housing unit characteristics (such as number of bedrooms and rent/owner costs).

⁴ The 2023 CHAS report utilized the American Community 5-Year Survey from 2016-2020.

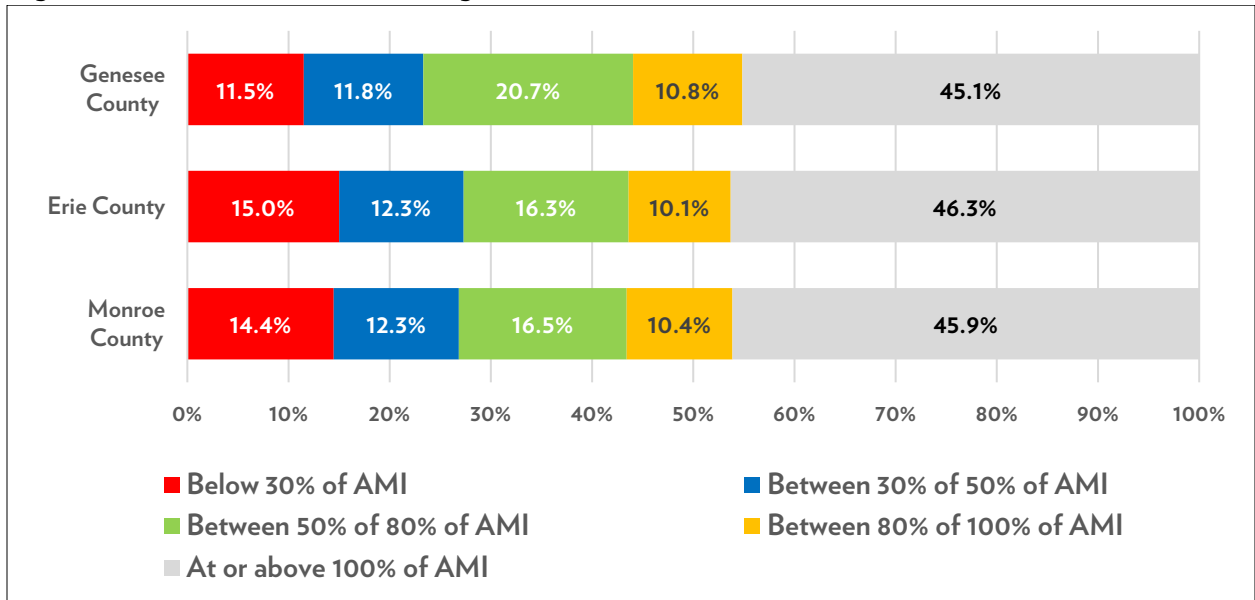
According to CHAS, 44.1% of Genesee County households earn less than 80% of AMI, slightly higher than the 43.6% of Erie County households and 43.7% of Monroe County households. Furthermore, 23.4% of households are considered very low-income, compared to 27.3% of Erie County households and 27.2% of Monroe County households (below 50% of AMI), and 11.6% are considered extremely low-income, compared to 15.0% in Erie County and 14.8% in Monroe County (below 30% of AMI; see Table 14).

Table 14: Household Income by AMI Category, 2016-2020

	Genesee County		Erie County		Monroe County	
	Count	%	Count	%	Count	%
Low-Income (Below 80% of AMI)	10,660	44.1%	171,265	43.6%	133,425	43.7%
Very Low-Income (Below 50% of AMI)	5,655	23.4%	107,340	27.3%	82,985	27.2%
Extremely Low-Income (Below 30% of AMI)	2,810	11.6%	58,940	15.0%	45,315	14.8%
At or above 100% of AMI	10,910	45.1%	182,000	46.3%	140,195	45.9%
Between 80% - 100% of AMI	2,610	10.8%	39,640	10.1%	31,590	10.4%
Between 50% - 80% of AMI	5,005	20.7%	63,925	16.3%	50,440	16.5%
Between 30% - 50% of AMI	2,845	11.8%	48,400	12.3%	37,670	12.3%
Below 30% of AMI	2,810	11.6%	58,940	15.0%	45,315	14.8%

Source: HUD, Urban Partners

Figure 9: Distribution of AMI Categories, 2016-2020



Source: HUD, Urban Partners

Housing Cost Burden - Owner Households in Genesee County

As previously discussed, the Census Bureau’s definition of “cost-burdened” households are those who pay more than 30% of their income on housing costs. For households paying more than 50% of their income toward housing costs, the term “extremely burdened” is applied.

Table 15 is a cost burden analysis for owner households in Genesee County, Erie County, and Monroe County. The CHAS data reports that 16.2% of Genesee County owner households are cost burdened, compared to 15.9% of Erie County owner households and 17.7% of Monroe County households. Furthermore, 5.8% of Genesee County owner households are extremely burdened, compared to 6.8% of Erie County owner households and 7.0% of Monroe County owner households.

Table 15: Cost Burdened Owner Households, 2016-2020

	All Homeowners	Cost-Burdened Homeowners	%	Extremely Burdened Homeowners	%
Genesee County	17,500	2,829	16.2%	1,019	5.8%
Erie County	254,695	40,395	15.9%	17,420	6.8%
Monroe County	193,320	34,205	17.7%	13,550	7.0%

Source: HUD, Urban Partners

Table 16 further details the cost burden of Genesee County’s owner-occupants by household incomes. The CHAS data estimate that of the 5,765 Genesee County homeowners earning less than 80% of AMI, 41.6% (2,400) are cost-burdened while 17.6% (1,015) are extremely burdened.

Table 16: Cost Burdened Owner Households by Income, Genesee County, 2016-2020

	All Homeowners	Cost-Burdened Homeowners	%	Extremely Burdened Homeowners	%
All Incomes	17,500	2,829	16.2%	1,019	5.8%
At or above 100% of Median	9,645	184	1.9%	4	0.0%
Between 80% - 100% of Median	2,095	245	11.7%	0	0.0%
Between 50% - 80% of Median	3,200	840	26.3%	235	7.3%
Between 30% - 50% of Median	1,655	850	51.4%	250	15.1%
Below 30% of Median	910	710	78.9%	530	58.2%
Low Income Categories					
Below 80% of Median	5,765	2,400	41.6%	1,015	17.6%
Below 50% of Median	2,565	1,560	60.8%	780	30.4%
Below 30% of Median	910	710	78.9%	530	58.2%

Source: HUD, Urban Partners

Housing Cost Burden - Renter Households in Genesee County

Table 17 is a cost burden analysis for renter households in Genesee County, Erie County, and Monroe County. The CHAS data reports that 38.6% of Genesee County renter households are cost burdened, while Erie County reports 44.1% and Monroe County 47.4%. Furthermore, 20.7% of Genesee County renter households are extremely burdened, compared to 24.4% of Erie County renter households and 26.3% of Monroe County renter households.

Table 17: Cost Burdened Renter Households, 2016-2020

	All Renters	Cost-Burdened Renters	%	Extremely Burdened Renters	%
Genesee County	6,675	2,574	38.6%	1,380	20.7%
Erie County	138,215	60,900	44.1%	33,740	24.4%
Monroe County	111,890	52,985	47.4%	29,400	26.3%

Source: HUD, Urban Partners

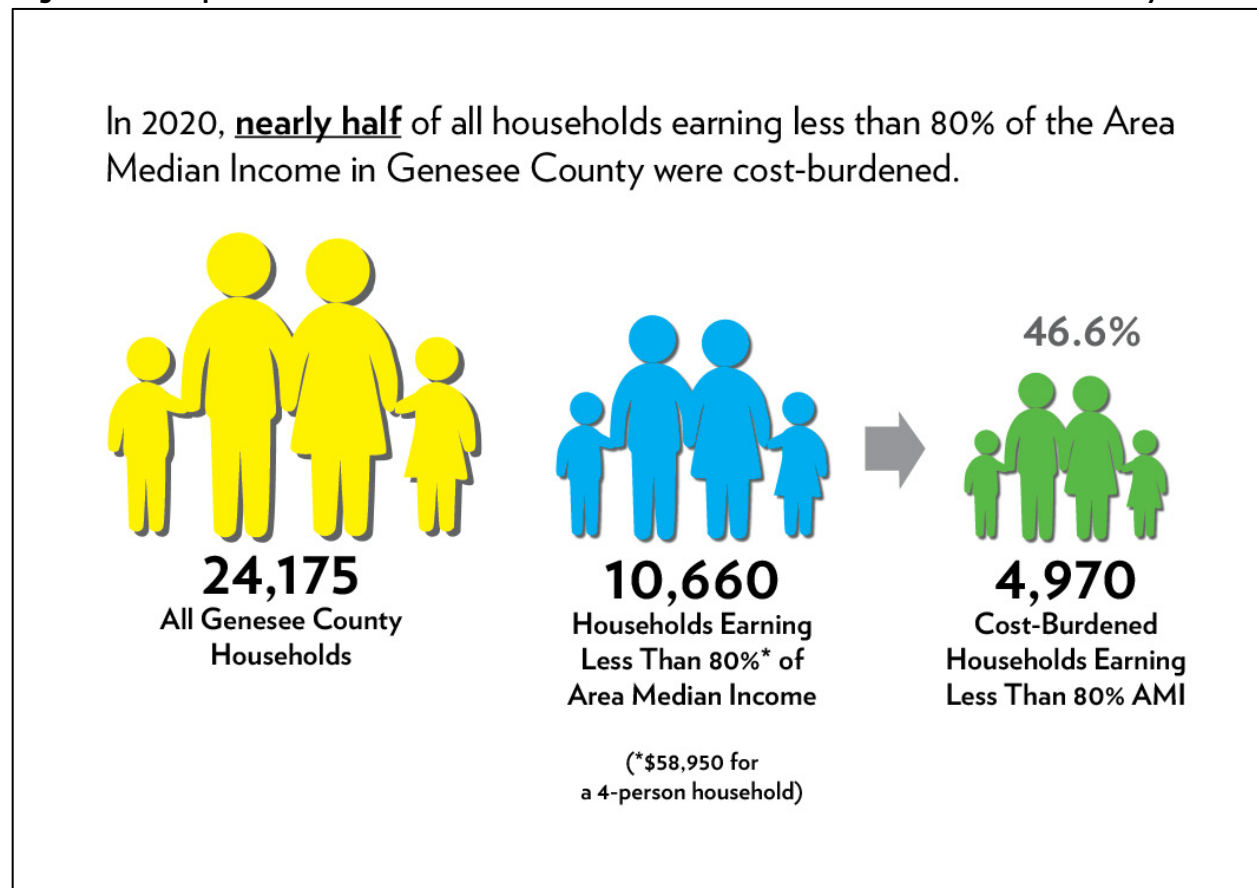
Table 18 further details the cost burden of Genesee County's renters by household incomes. The CHAS data estimate that of the 3,090 Genesee County renters earning less than 50% of AMI, 72.5% (2,240) are cost-burdened while 44.3% (1,370) are extremely burdened.

Table 18: Cost Burdened Renter Households by Income, Genesee County, 2016-2020

	All Renters	Cost-Burdened Renters	%	Extremely Burdened Renters	%
All Incomes	6,675	2,574	38.6%	1,380	20.7%
At or above 100% of Median	1,265	0	0.0%	0	0.0%
Between 80% - 100% of Median	515	4	0.8%	0	0.0%
Between 50% - 80% of Median	1,805	330	18.3%	10	0.6%
Between 30% - 50% of Median	1,190	745	62.6%	75	6.3%
Below 30% of Median	1,900	1,495	78.7%	1,295	68.2%
Low Income Categories					
Below 80% of Median	4,895	2,570	52.5%	1,380	28.2%
Below 50% of Median	3,090	2,240	72.5%	1,370	44.3%
Below 30% of Median	1,900	1,495	78.7%	1,295	68.2%

Source: HUD, Urban Partners

Figure 10: Snapshot of the Cost Burden for Low-Income Households in Genesee County



Key Takeaways of Housing Affordability

Income Limits: HUD categorizes households into low-income (below 80% of AMI), very low-income (below 50% of AMI), and extremely low-income (below 30% of AMI) for housing affordability assessments. For a four-person household in 2020, the low-income threshold is \$58,950, very low-income is \$36,850, and extremely low-income is \$22,100 annually.

Low-Income Households: 44.1% of Genesee County households earn less than 80% of AMI, slightly higher than in Erie and Monroe Counties.

Very Low-Income Households: 23.4% of Genesee County households earn less than 50% of AMI, which is lower compared to Erie and Monroe Counties.

Extremely Low-Income Households: 11.6% of Genesee County households earn less than 30% of AMI, also lower compared to Erie and Monroe Counties.

Cost-Burdened Homeowners: 16.2% of homeowners in Genesee County are cost-burdened (paying more than 30% of their income on housing), and 5.8% are extremely burdened (paying more than 50%).

Cost-Burdened Renters: 38.6% of renters in Genesee County are cost-burdened, and 20.7% are extremely burdened, lower than the percentages in Erie and Monroe Counties.

High Burden on Low-Income Homeowners: Among Genesee County homeowners earning less than 80% of AMI, 41.6% are cost-burdened, with the burden increasing significantly for those earning less than 30% of AMI.

High Burden on Low-Income Renters: A significant portion (72.5%) of low-income renters in Genesee County are cost-burdened, with 44.3% being extremely burdened.

4. Special Needs Population

Persons with Disabilities

People with disabilities often encounter many barriers to securing safe and stable housing. The Census Bureau identifies the following six categories of disabilities:

- Hearing: deaf or had serious difficulty hearing.
- Vision: blind or had serious difficulty seeing even when wearing glasses.
- Cognitive: serious difficulty concentrating, remembering, or making decisions.
- Ambulatory: having serious difficulty walking or climbing stairs.
- Self-Care: difficulty dressing or bathing.
- Independent Living: have difficulty doing errands alone such as visiting a doctor’s office or shopping due to a physical, mental, or emotional condition.

From 2012 to 2022, the percentage of Genesee County residents reporting at least one of the above disabilities has increased. In 2022, 15.4% of the county’s civilian noninstitutionalized population had at least one type of disability, up from 12.2% in 2012. New York State’s disabled population increased from 10.9% in 2012 to 11.9% in 2022 (see Table 19).

Table 19: Disability Status, 2012-2022

	State of New York			Genesee County		
	Total Civilian Population	With a Disability	% with a Disability	Total Civilian Population	With a Disability	% with a Disability
2012	19,138,275	2,084,684	10.9%	59,176	7,196	12.2%
2022	19,789,790	2,355,119	11.9%	57,666	8,853	15.4%

Source: U.S. Census Bureau, Urban Partners

Table 20 summarizes the disability status for Genesee County by age. According to the 2022 ACS, 46.8% of all Genesee County seniors 75 years and over are living with at least one disability.

Table 20: Disability Status by Age, 2022

	Total Civilian Population	Population With a Disability	% of Total Population With a Disability
Under 5 years	3,000	27	0.9%
5 to 17 years	8,818	445	5.0%
18 to 34 years	11,730	1,202	10.2%
35 to 64 years	23,204	3,495	15.1%
65 to 74 years	6,307	1,528	24.2%
75 years and over	4,607	2,156	46.8%

Source: U.S. Census Bureau, Urban Partners

Table 21 summarizes the six census-defined disabilities by age groups. According to the Census Bureau, 7.8% of Genesee County residents have ambulatory disabilities, followed by 7.6% with independent living disabilities and 6.3% with cognitive disabilities.

Table 21: Disability Characteristics by Age Groups, 2022

	Under 18		18-64	65 and Older	Total Population with Disabilities	% of County Population with Disabilities
	Under 5	5-17				
Hearing	27	17	872	1,515	2,431	4.2%
Vision	14	68	826	547	1,455	2.5%
Cognitive	316		2,228	885	3,429	6.3%
Ambulatory	1		2,213	2,064	4,278	7.8%
Self-Care	72		639	777	1,488	2.7%
Independent Living	-		2,031	1,458	3,489	7.6%

Source: U.S. Census Bureau, Urban Partners

Table 22 shows disability status for residents of the 15 county subdivisions in Genesee County (the column detailing the percentage of residents with a disability is color coded to show the highest percentages in deeper red and the lowest percentages in deeper green). As a percentage of its civilian noninstitutionalized population, the Tonawanda Reservation has the highest rate of disability at 31.0%, followed by the City of Batavia (19.6%) and the Town of Batavia (16.9%). In terms of the highest numerical concentration of residents with disabilities, the following three report the most: City of Batavia (2,950 residents), Town of Le Roy (1,165 residents), and the Town of Batavia (1,065 residents).

Table 22: Disability Status by Jurisdiction, 2022

	Total Civilian Population	With a Disability	Percent with a Disability
Alabama Town	2,038	231	11.3%
Alexander Town	2,661	280	10.5%
Batavia City	15,081	2,950	19.6%
Batavia Town	6,309	1,065	16.9%
Bergen Town	3,111	425	13.7%
Bethany Town	1,661	193	11.6%
Byron Town	1,951	242	12.4%
Darien Town	3,005	450	15.0%
Elba Town	2,132	241	11.3%
Le Roy Town	7,510	1,165	15.5%
Oakfield Town	3,141	446	14.2%
Pavilion Town	2,264	253	11.2%
Pembroke Town	4,245	597	14.1%
Stafford Town	2,228	213	9.6%
Tonawanda Reservation	329	102	31.0%

Source: U.S. Census Bureau, Urban Partners

Homelessness

The Point-in-Time (PIT) count is a count of sheltered and unsheltered people experiencing homelessness on a single night in January. HUD requires that Continuums of Care⁵ conduct an annual count of people experiencing homelessness who are sheltered in emergency shelter, transitional housing, and Safe Havens⁶ on a single night. According to the PIT count conducted in January of 2023 for Genesee County, there were a total of 46 homeless persons (see Table 23).

Table 23: Summary of Homeless Persons in the FLHC Area, 2020-2023

	2020	%	2021	%	2022	%	2023	%
Total Persons (Adults & Children)	18		27		32		46	
Unsheltered	0	0.0%	0	0.0%	2	6.3%	2	4.3%
Sheltered	18	100.0%	27	100.0%	30	93.7%	44	95.7%
Emergency Shelter/Hotel	18		27		30		44	
Transitional Housing	0		0		0		0	

Source: Point-in-Time Report 2020-2023, Homeless Alliance of Western New York

Table 24 shown below are demographic descriptions of homeless persons in Genesee County. The PIT reports that in 2020 (prior to the COVID-19 pandemic severely impacting the PIT counting procedures) show that Genesee County had two homeless children and one household with children. The total number of homeless persons saw spikes between 2020 and 2021 (from 15 to 25) and between 2022 and 2023 (from 20 to 29), while the number of children experiencing homelessness rose from one in 2021 to 12 in 2023. There was also a spike in veterans from seven in 2022 to 14 in 2023.

Table 24: Demographic Profiles of Homeless Persons in Genesee County, 2020-2023

	2020	%	2021	%	2022	%	2023	%
Total in Households w/o Children	15	83.3%	25	92.6%	20	66.7%	29	65.9%
Total in Households w/ Children	3	16.7%	2	7.4%	10	33.3%	15	34.1%
Adults	1		1		3		3	
Children	2		1		7		12	
Households with Children	1		1		3		4	
Veterans	11		13		7		14	

Source: Point-in-Time Report 2020-2023, Homeless Alliance of Western New York

⁵ For Genesee County, the Homeless Alliance of Western New York is the Homeless Continuum of Care (CoC) for the geographic area composed of Erie, Niagara, Genesee, Wyoming, and Orleans counties.

⁶ Safe Haven is a form of supportive housing that serves hard-to-reach homeless persons with severe mental illness who come primarily from the streets and have been unable or unwilling to participate in housing or supportive services.

Veterans

The Clearinghouse for Military Family Readiness—which is based in the Social Science Research Institute (SSRI) at the Pennsylvania State University—is an interdisciplinary team of research faculty and staff, and creative services professionals committed to providing outstanding support to professionals who offer programs and services to military families. In 2017, the Clearinghouse published a research document called *Supporting United States Veterans: a Review of Veteran-Focused Needs Assessments from 2008-2017*. The report outlines the challenges that veterans typically experience, including “finding affordable housing, obtaining a mortgage, and needing but not having access to rent or mortgage assistance.” Furthermore, the study found that “homelessness affects approximately one-third of veterans even though veterans comprise only about 2% of the U.S. population.”

The following statement regarding the high incidence of homelessness among veterans is from the National Coalition of Homeless Veterans—a non-profit organization that provides technical assistance for a national network of service providers that assist homeless veterans:

“In addition to the complex set of factors influencing all homelessness—extreme shortage of affordable housing, livable income, and access to health care—a large number of displaced and at-risk veterans live with lingering effects of post-traumatic stress disorder (PTSD) and substance abuse, which are compounded by a lack of family and social support networks. Additionally, military occupations and training are not always transferable to the civilian workforce, placing some veterans at a disadvantage when competing for employment. A top priority for homeless veterans is secure, safe, clean housing that offers a supportive environment free of drugs and alcohol.”

To illustrate the magnitude of potential need in Genesee County’s veteran population, the following tables in this section summarize the number of veterans as well as their income and disability status. According to the 2022 ACS, 3,543 veterans reside in Genesee County, representing 7.6% of the county’s total civilian population over 18 years-of-age. The ratio is significantly higher than the state which reports 4.0% veterans (Table 25).

Table 25: Veteran Status, Population 18 Years and Over, 2022

	Total Civilian Population	Veterans	% Veterans
New York State	15,840,317	634,062	4.0%
Genesee County	46,370	3,543	7.6%

Source: U.S. Census Bureau, Urban Partners

Veterans are much more likely to be living with disabilities than non-veterans. According to the 2022 ACS, 1,159 veterans in Genesee County have disabilities, representing 34.1% of all veterans in the county. In comparison, non-veterans residing in Genesee County report disabilities at a rate of 17.0% (Table 26).

Table 26: Veteran/Disability Status, Population 18 Years and Over, 2022⁷

	All Veterans	Veterans with Disabilities	% Veterans with Disabilities	All Non-Veterans	Non-Veterans with Disabilities	% Non-Veterans with Disabilities
New York State	623,711	179,162	28.7%	14,822,685	1,994,070	13.5%
Genesee County	3,400	1,159	34.1%	42,366	7,216	17.0%

Source: U.S. Census Bureau, Urban Partners

On the other hand, veterans have a slightly lower rate of poverty than non-veterans. Shown in Table 27, 10.5% of Genesee County veterans live below the federal poverty rate, compared to 10.7% for non-veterans. This difference is starker statewide, where 7.9% of veterans live below the federal poverty rate compared to 12.6% non-veterans.

Table 27: Veteran/Poverty Status, Population 18 Years and Over, 2022⁷

	Veterans			Non-Veterans		
	Total	Below Poverty Level	% Below Poverty Level	Total	Below Poverty Level	% Below Poverty Level
New York State	623,711	49,139	7.9%	14,822,685	1,871,211	12.6%
Genesee County	3,400	356	10.5%	42,366	4,521	10.7%

Source: U.S. Census Bureau, Urban Partners

Finally, Table 28 summarizes the most vulnerable segment of Genesee County’s veteran population—those who are disabled and living under the poverty line. According to the 2022 ACS, 5.5% of Genesee County veterans (186) are disabled and live below the poverty line.

Table 28: Veteran/Poverty/Disability Status, Population 18 Years and Over, 2022⁷

	All Veterans	Veterans Below Poverty Level with Disabilities	% Veterans Below Poverty Level with Disabilities
New York State	623,711	20,475	3.3%
Genesee County	3,400	186	5.5%

Source: U.S. Census Bureau, Urban Partners

Table 29 shown on the following page summarizes the number and percentage of veterans in each of the 15 county subdivisions within Genesee County. County subdivisions with the most veterans are: the City of Batavia (981, 7.9% of the civilian population), the Town of Batavia (599,

⁷ For whom poverty is determined.

12.0%) and the Town of Le Roy (453, 7.5%). These three county subdivisions also report the highest number of veterans living under the poverty line: 94 in the Town of Le Roy, 86 in the Town of Batavia, and 85 in the City of Batavia.

Table 29: Veteran Disability Status by Co. Subdivision, Population 18 Years and Over, 2022⁸

	Civilian Population 18 Years and Over	Veterans	% Veterans	Veterans with Any Disability	Veterans Below Poverty Level
Alabama Town	1,543	86	5.6%	36	9
Alexander Town	1,848	121	6.5%	33	14
Batavia City	12,402	981	7.9%	319	85
Batavia Town	4,972	599	12.0%	146	86
Bergen Town	2,547	140	5.5%	30	15
Bethany Town	1,227	65	5.3%	12	-
Byron Town	1,390	131	9.4%	20	-
Darien Town	2,435	109	4.5%	50	-
Elba Town	1,542	107	6.9%	45	4
Le Roy Town	6,016	453	7.5%	273	94
Oakfield Town	2,483	158	6.4%	35	7
Pavilion Town	1,807	100	5.5%	50	12
Pembroke Town	3,530	157	4.4%	53	3
Stafford Town	1,719	147	8.6%	36	18
Tonawanda Reservation	305	46	15.1%	21	9

Source: U.S. Census Bureau, Urban Partners

Key Takeaways of the Special Needs Population

Disability Prevalence: The percentage of Genesee County residents with disabilities increased from 12.2% in 2012 to 15.4% in 2022, higher than the state average of 11.9%.

Age and Disability: Nearly half (46.8%) of residents aged 75 and older in Genesee County have at least one disability, the highest among all age groups.

Types of Disabilities: The most common disabilities in the county are ambulatory disabilities (7.8% of the population), independent living disabilities (7.6%), and cognitive disabilities (6.3%).

Geographic Distribution: The Tonawanda Reservation has the highest percentage of residents with disabilities at 31.0%, followed by the City of Batavia (19.6%).

⁸ For whom poverty is determined.

Homelessness Trends: Homelessness in Genesee County increased from 18 persons in 2020 to 46 in 2023, with a notable rise in the number of homeless children and veterans during this period.

Veteran Population: Veterans make up 7.6% of the adult population in Genesee County, a higher percentage than the state average of 4.0%.

Veterans with Disabilities: About 34.1% of veterans in the county have a disability, double the rate of non-veterans (17.0%).

Veteran Poverty: While veterans have a slightly lower poverty rate (10.5%) than non-veterans (10.7%), 5.5% of veterans are both disabled and living below the poverty line.

Concentration of Veterans: The City of Batavia, Town of Batavia, and Town of Le Roy have the highest numbers of veterans, with significant portions also living in poverty.

5. Employment Trends

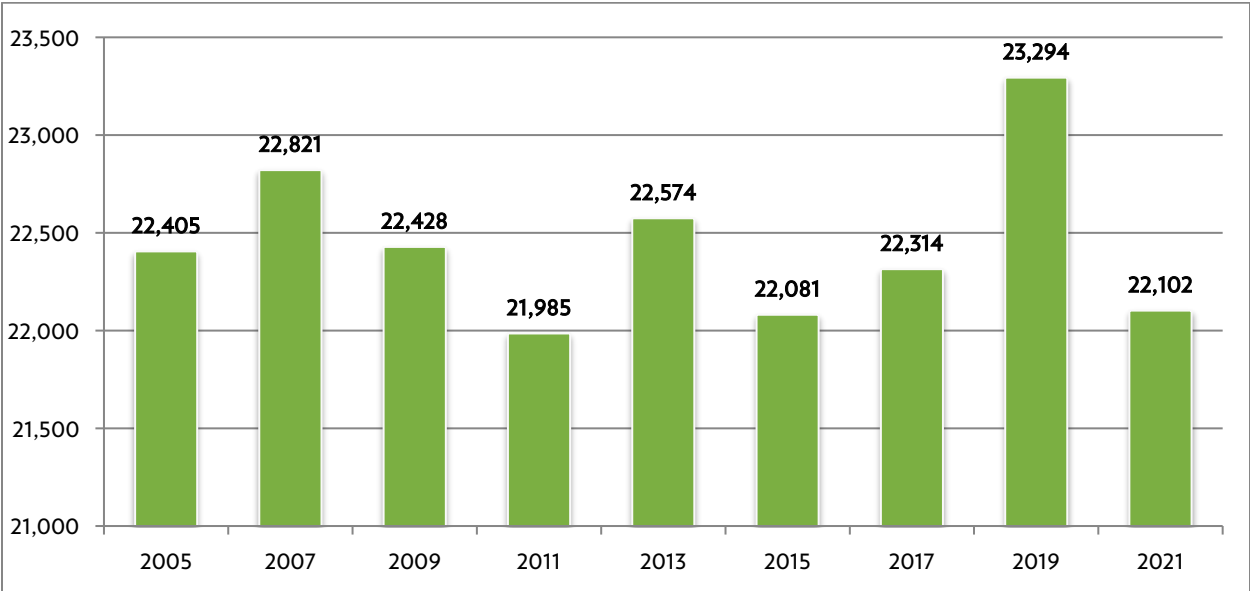
The correlation between job growth (or decline) and the local housing market is complex and beyond the scope of this housing study, but simply stated—as a region or municipality adds new jobs, it attracts new workers and their households that will need housing. The increase in new residents will increase demand for homes and will result in a more competitive marketplace for housing. Conversely, the opposite will occur when a region or municipality loses jobs.

The following is an examination of employment patterns for Genesee County and its residents from 2005 to 2021. The data source for this analysis is the *OnTheMap* application from the U.S. Census Bureau’s Longitudinal Employer-Household Dynamics Program, which uses employer payroll tax information to geo-locate jobs within a defined area.

Jobs Located in Genesee County

According to the *OnTheMap* application, Genesee County reported a total of 22,102 jobs in 2021, losing 303 jobs from 2005, a decrease of 1.4% (see Figure 11). There were three economic dips during that period—first during the Great Recession 2007 to 2011 when the county shed 836 jobs; the second from 2013 to 2015 with a loss of 493 jobs; and the third during the coronavirus pandemic 2019 to 2021 with a loss of 1,192 jobs. Preceding the pandemic, the county recovered each time with subsequent job gains.

Figure 11: Jobs Located in Genesee County (2005-2021) ⁹



Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

⁹ More recent employment data from the Bureau of Labor Statistics indicates that the average annual employment in Genesee County in 2023 was 23,004.

As detailed in Table 30 below, *Manufacturing* overtook *Educational Services* as the top Genesee County employment sector between 2005 and 2021. The 3,420 jobs in the *Manufacturing* sector account for 15.5% of all jobs located in Genesee County. The *Health Care and Social Assistance* sector, which gained 331 jobs from 2005 to 2021, is the second largest sector with 3,075 jobs in the county.

Three other industry sectors experienced robust job growth from 2005 to 2021 — *Management of Companies and Enterprises*, which added 372 jobs (growth rate of 1,094.0%); *Wholesale Trade*, which added 279 net new jobs (growth rate of 27.5%); and *Public Administration*, which added 253 net new jobs (growth rate of 18.5%).

Three sectors experienced large job losses. The largest was *Educational Services*, which lost 513 jobs (decline of 14.9%), followed by *Other Services (excluding Public Administration)*, which lost 473 jobs (decline of 38.5%), and *Accommodation and Food Services*, which lost 430 jobs (decline of 20.3%).

Table 30: Jobs Located in Genesee County by Industry Sectors, 2005-2021

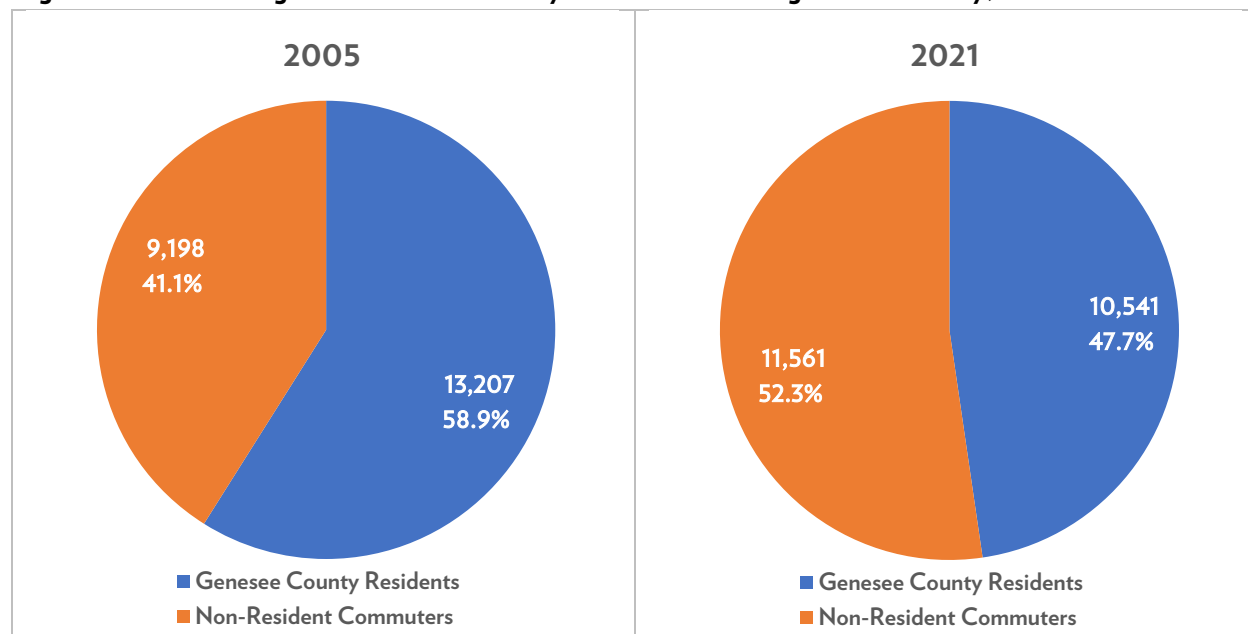
	Jobs in 2005	%	Jobs in 2021	%	Change 2005-2021
All Sectors	22,405	100.0%	22,102	100.0%	-303
Manufacturing	3,059	13.7%	3,420	15.5%	361
Health Care and Social Assistance	2,744	12.2%	3,075	13.9%	331
Educational Services	3,442	15.4%	2,929	13.3%	-513
Retail Trade	2,488	11.1%	2,428	11.0%	-60
Accommodation and Food Services	2,115	9.4%	1,685	7.6%	-430
Public Administration	1,368	6.1%	1,621	7.3%	253
Wholesale Trade	1,013	4.5%	1,292	5.8%	279
Agriculture, Forestry, Fishing and Hunting	716	3.2%	870	3.9%	154
Construction	781	3.5%	804	3.6%	23
Other Services (excluding Public Administration)	1,228	5.5%	755	3.4%	-473
Admin. & Support, Waste Mgmt. and Remediation	780	3.5%	660	3.0%	-120
Arts, Entertainment, and Recreation	524	2.3%	552	2.5%	28
Transportation and Warehousing	496	2.2%	467	2.1%	-29
Management of Companies and Enterprises	34	0.2%	406	1.8%	372
Professional, Scientific, and Technical Services	594	2.7%	350	1.6%	-244
Finance and Insurance	319	1.4%	337	1.5%	18
Real Estate and Rental and Leasing	311	1.4%	164	0.7%	-147
Information	265	1.2%	136	0.6%	-129
Utilities	77	0.3%	91	0.4%	14
Mining, Quarrying, and Oil and Gas Extraction	51	0.2%	60	0.3%	9

Source: U.S. Census Bureau Center for Economic Studies, *Urban Partners*

In terms of commuting, the *OnTheMap* application reports that the percentage of workers commuting from outside of the county has increased, from 9,198 workers (41.1% of county workforce) in 2005 to 11,561 (52.3% of county workforce) in 2021. The number of workers living

and working in Genesee County has dipped from 13,207 in 2005 to 10,541 in 2021 (see Figure 12 below).

Figure 12: Percentage of Genesee County Workers Residing in the County, 2005-2021



Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

As a percentage of the Genesee County labor force, county residents still comprise the largest segment in 2021 (47.7%) despite its loss of 20.2% since 2005, followed by those commuting from adjacent Monroe County (which increased from 1,946 workers in 2005 to 2,617 in 2021, or 34.5%). Commuters from Niagara County and Orleans County saw more significant increases (67.9% and 52.9% from 2005 to 2021, respectively. See Table 31). The largest decrease other than Genesee County was a 3.2% reduction in workers coming from Onondaga County.

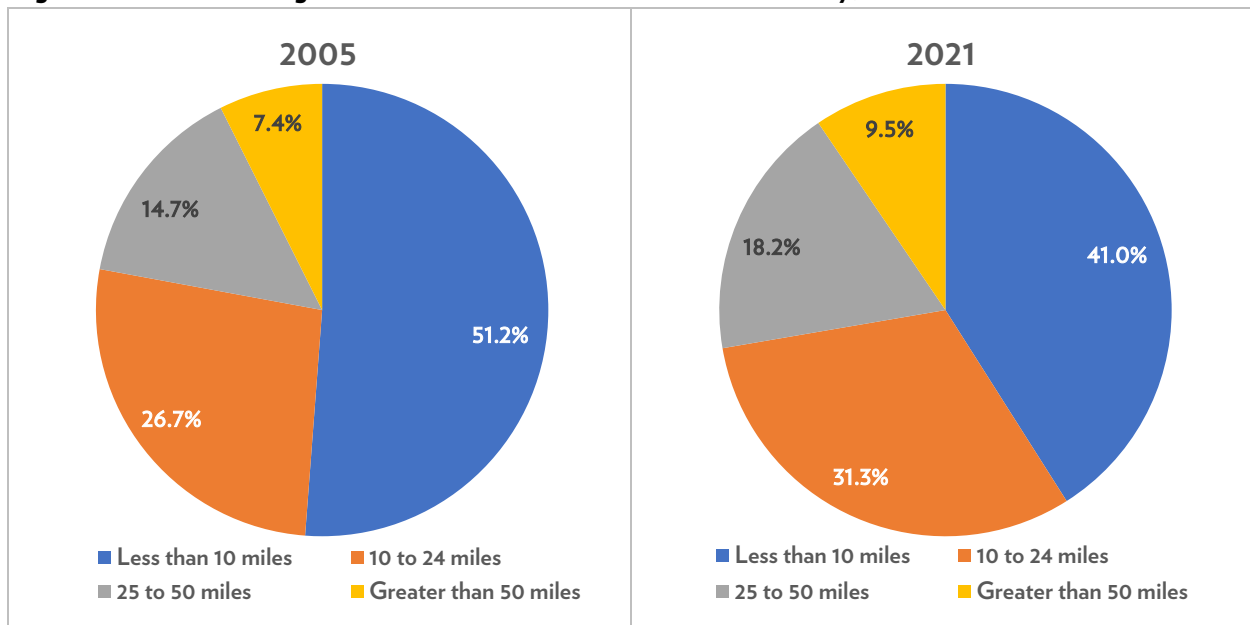
Table 31: Top Commuting Origins for Genesee County Workers, 2005-2021

	Jobs in 2005	%	Jobs in 2021	%	% Change 2005-2021
Genesee County, NY	13,207	58.9%	10,541	47.7%	-20.2%
Monroe County, NY	1,946	8.7%	2,617	11.8%	34.5%
Erie County, NY	1,800	8.0%	2,139	9.7%	18.8%
Wyoming County, NY	1,575	7.0%	1,718	7.8%	9.1%
Orleans County, NY	745	3.3%	1,139	5.2%	52.9%
Livingston County, NY	848	3.8%	886	4.0%	4.5%
Niagara County, NY	396	1.8%	665	3.0%	67.9%
Ontario County, NY	181	0.8%	207	0.9%	14.4%
Onondaga County, NY	185	0.8%	179	0.8%	-3.2%
Wayne County, NY	140	0.6%	160	0.7%	14.3%
All Other Locations	1,382	6.2%	1,851	8.4%	33.9%

Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Commuting distances have also evolved among workers in Genesee County. In 2005, 51.2% of workers employed in the county traveled less than 10 miles for work and 7.4% lived more than 50 miles from their work locations. In 2021, 41.0% of workers employed in Genesee County reported commutes of less than 10 miles, while the percentage of workers commuting more than 50 miles increased to 9.5% (see Figure 13).

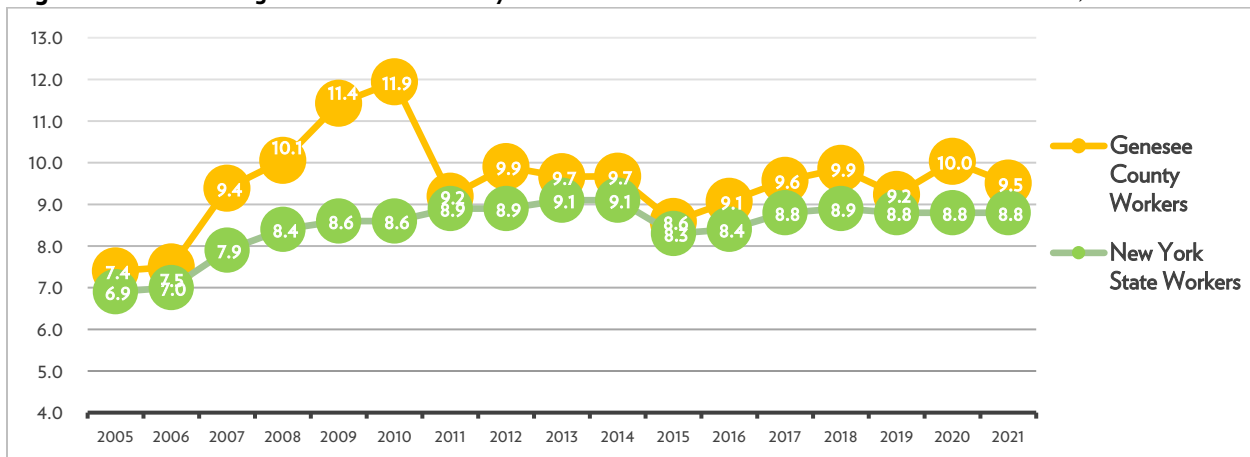
Figure 13: Commuting Distances of Workers in Genesee County, 2005-2021



Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Figure 14 shows the percentage of workers in Genesee County who live more than 50 miles from their place of employment from 2005 to 2021. Compared to the state average, a larger percentage of employed Genesee County workers commute more than 50 miles (9.5% compared to 8.8% in 2021).

Figure 14: Percentage of Genesee County Workers that Live More than 50 Miles from Work, 2005-2021



Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Employed Genesee County Residents

According to the *OnTheMap* application, there were a total of 26,617 employed residents of Genesee County in 2021, a decrease of 2,031 persons (-7.1%) from 2005 (see Table 32). The following are the top five sectors in which county residents were employed in 2021: *Health Care & Social Assistance*; *Manufacturing*; *Educational Services*; *Retail Trade*; and *Accommodation and Food Services*.

There are several notable observations for this period: i) 13 out of the 20 sectors experienced a decrease in the number of jobs; ii) the percentage of Genesee County residents employed in the *Health Care & Social Assistance* sector increased from 12.0% to 14.5%, accounting for 419 additional workers, or a 12.1% increase; iii) the number of Genesee County residents employed in the *Management of Companies and Enterprises* sector grew from 311 to 564, or an 81.4% increase; and iv) the *Manufacturing* and *Educational Services* sectors experienced the largest declines among residents, with a loss of 818 and 646 jobs, respectively, between 2005 – 2021.

Table 32: Jobs of Genesee County Residents by Industry Sectors, 2005-2021

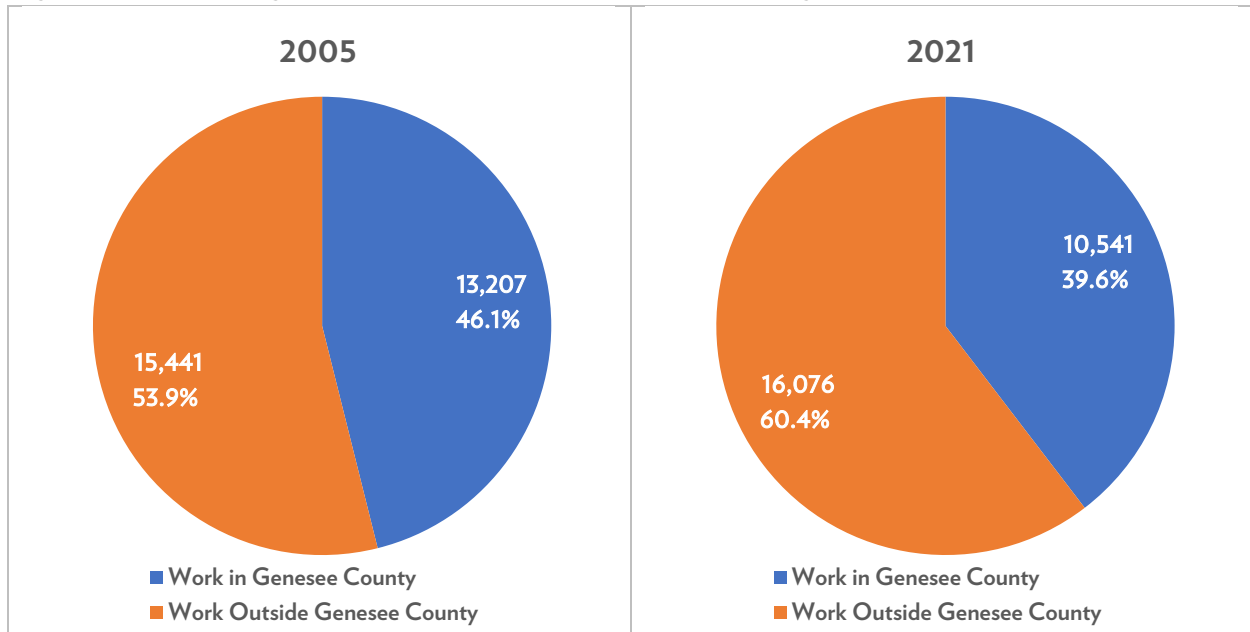
	Jobs in 2005	%	Jobs in 2021	%	Change 2005-2021
All Sectors	28,648	100.0%	26,617	100.0%	-2,031
Health Care and Social Assistance	3,452	12.0%	3,871	14.5%	419
Manufacturing	4,461	15.6%	3,643	13.7%	-818
Educational Services	3,837	13.4%	3,191	12.0%	-646
Retail Trade	3,144	11.0%	3,005	11.3%	-139
Accommodation and Food Services	2,236	7.8%	1,869	7.0%	-367
Public Administration	1,884	6.6%	1,849	6.9%	-35
Construction	1,127	3.9%	1,274	4.8%	147
Wholesale Trade	1,399	4.9%	1,147	4.3%	-252
Admin. & Support, Waste Mgmt. and Remediation	1,122	3.9%	1,009	3.8%	-113
Professional, Scientific, and Technical Services	893	3.1%	987	3.7%	94
Other Services (excluding Public Administration)	1,247	4.4%	885	3.3%	-362
Transportation and Warehousing	776	2.7%	806	3.0%	30
Finance and Insurance	722	2.5%	757	2.8%	35
Agriculture, Forestry, Fishing and Hunting	626	2.2%	616	2.3%	-10
Management of Companies and Enterprises	311	1.1%	564	2.1%	253
Arts, Entertainment, and Recreation	412	1.4%	420	1.6%	8
Information	435	1.5%	314	1.2%	-121
Real Estate and Rental and Leasing	382	1.3%	265	1.0%	-117
Utilities	105	0.4%	95	0.4%	-10
Mining, Quarrying, and Oil and Gas Extraction	77	0.3%	50	0.2%	-27

Source: U.S. Census Bureau Center for Economic Studies, *Urban Partners*

The *OnTheMap* application reports that as of 2021, 10,541 out of the 26,617 employed Genesee County residents, or 39.6%, work inside the county—meaning that 60.4% of employed county

residents commute elsewhere for work. As a comparison, 46.1% of employed Genesee County residents (13,207) worked inside the county in 2005 (see Figure 15 below).

Figure 15: Percentage of Genesee County Residents Working in the County, 2005-2021



Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

More than one-fifth of Genesee County residents (5,452) commuted to Monroe County for work in 2021, followed by those commuting to Erie County (5,046). New York County had the highest percentage increase in commuting residents (346.8%), Niagara County the second-highest (56.0%), and Onondaga County the third-highest (42.3%. See Table 33).

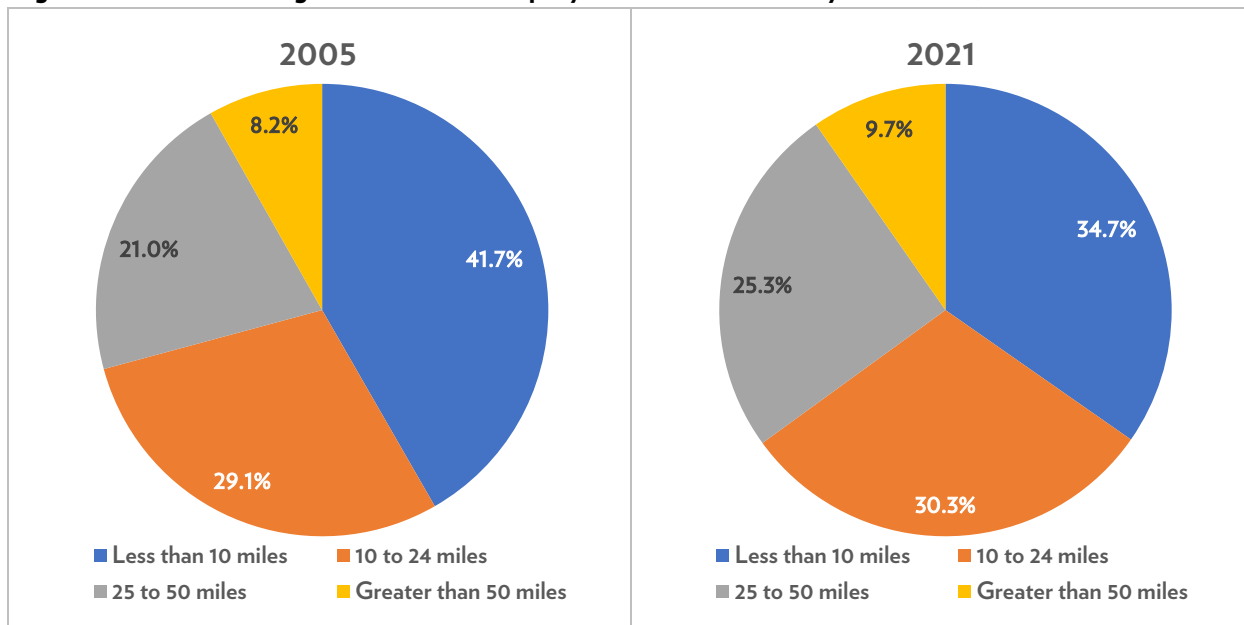
Table 33: Top Commuting Destinations for Employed Genesee County Residents, 2005-2021

	Jobs in 2005	%	Jobs in 2021	%	% Change 2005-2021
Genesee County, NY	13,207	46.1%	10,541	39.6%	-20.2%
Monroe County, NY	5,772	20.2%	5,452	20.5%	-5.5%
Erie County, NY	4,503	15.7%	5,046	19.0%	12.1%
Wyoming County, NY	876	3.1%	869	3.3%	-0.8%
Livingston County, NY	779	2.7%	671	2.5%	-13.9%
Orleans County, NY	551	1.9%	634	2.4%	15.1%
Niagara County, NY	400	1.4%	624	2.3%	56.0%
Onondaga County, NY	286	1.0%	407	1.5%	42.3%
Ontario County, NY	256	0.9%	278	1.0%	8.6%
New York County, NY	62	0.2%	277	1.0%	346.8%
All Other Locations	1,956	6.8%	1,818	6.8%	-7.1%

Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Commuting distances have also evolved among employed Genesee County residents. In 2005, 41.7% of employed county residents traveled less than 10 miles for work and 8.2% lived more than 50 miles from their work locations. In 2021, 34.7% of employed Genesee County residents reported commutes of less than 10 miles, while the percentage of county residents commuting more than 50 miles increased to 9.7% (see Figure 16).

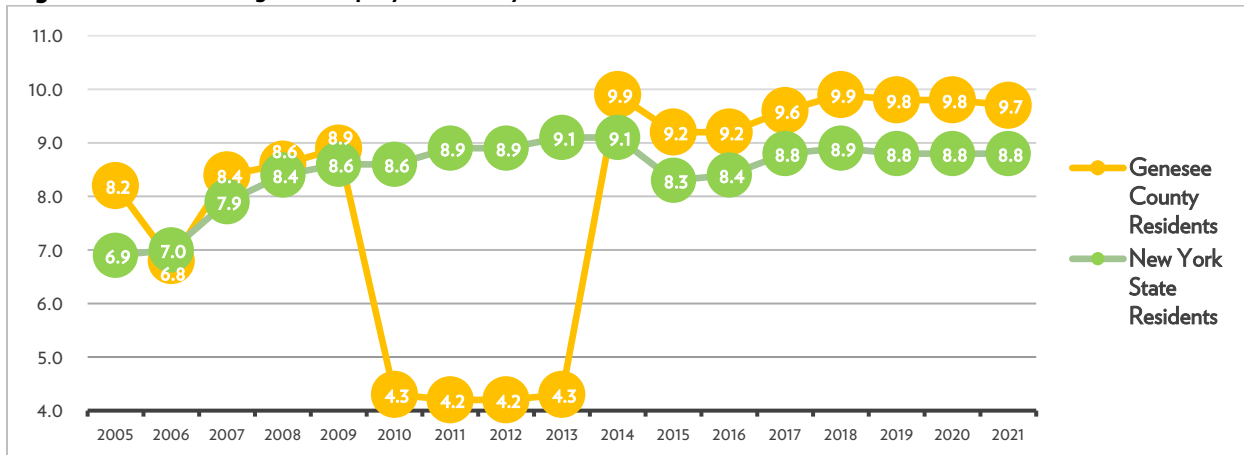
Figure 16: Commuting Distances of Employed Genesee County Residents, 2005-2021



Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Figure 17 shows the percentage of employed residents who live more than 50 miles from their place of employment from 2005 to 2021. Compared to the state average, a larger percentage of employed Genesee County residents commute more than 50 miles (9.7% compared to 8.8% in 2021).

Figure 17: Percentage of Employed County Residents that Live More than 50 Miles from Work, 2005-2021



Source: U.S. Census Bureau Center for Economic Studies, Urban Partners

Key Takeaways of Employment Trends

Job Trends: Genesee County saw a 1.4% decrease in jobs from 2005 to 2021, with some job losses during the Great Recession, a dip from 2013 to 2015, and a peak prior to the COVID-19 pandemic.

Sector Shifts: Manufacturing became the top employment sector by 2021, accounting for 15.5% of all jobs, followed by Health Care and Social Assistance.

Growing Sectors: The Management of Companies and Enterprises sector experienced the highest increase (372 jobs growth), followed by Manufacturing, Health Care and Social Assistance, Wholesale Trade, and Public Administration.

Declining Sectors: Educational Services, Other Services, and Accommodation and Food Services saw the largest job losses, with declines of 14.9%, 38.5%, and 20.3%, respectively.

Worker Commuting Patterns: The number of workers commuting from outside Genesee County increased, with 52.3% of the workforce commuting into the county by 2021, up from 41.1% in 2005.

Resident Employment: The number of employed residents in Genesee County decreased by 7.1% from 2005 to 2021, with the largest employment sectors being Health Care & Social Assistance, Manufacturing, and Educational Services.

Increased Resident Out-Commuting: A significant portion of employed Genesee County residents commute outside the county for work, with only 39.6% working within the county in 2021, down from 46.1% in 2005.

Resident Commuting Distances: The percentage of resident workers commuting less than 10 miles decreased, while those commuting more than 50 miles increased from 8.2% in 2005 to 9.7% in 2021.

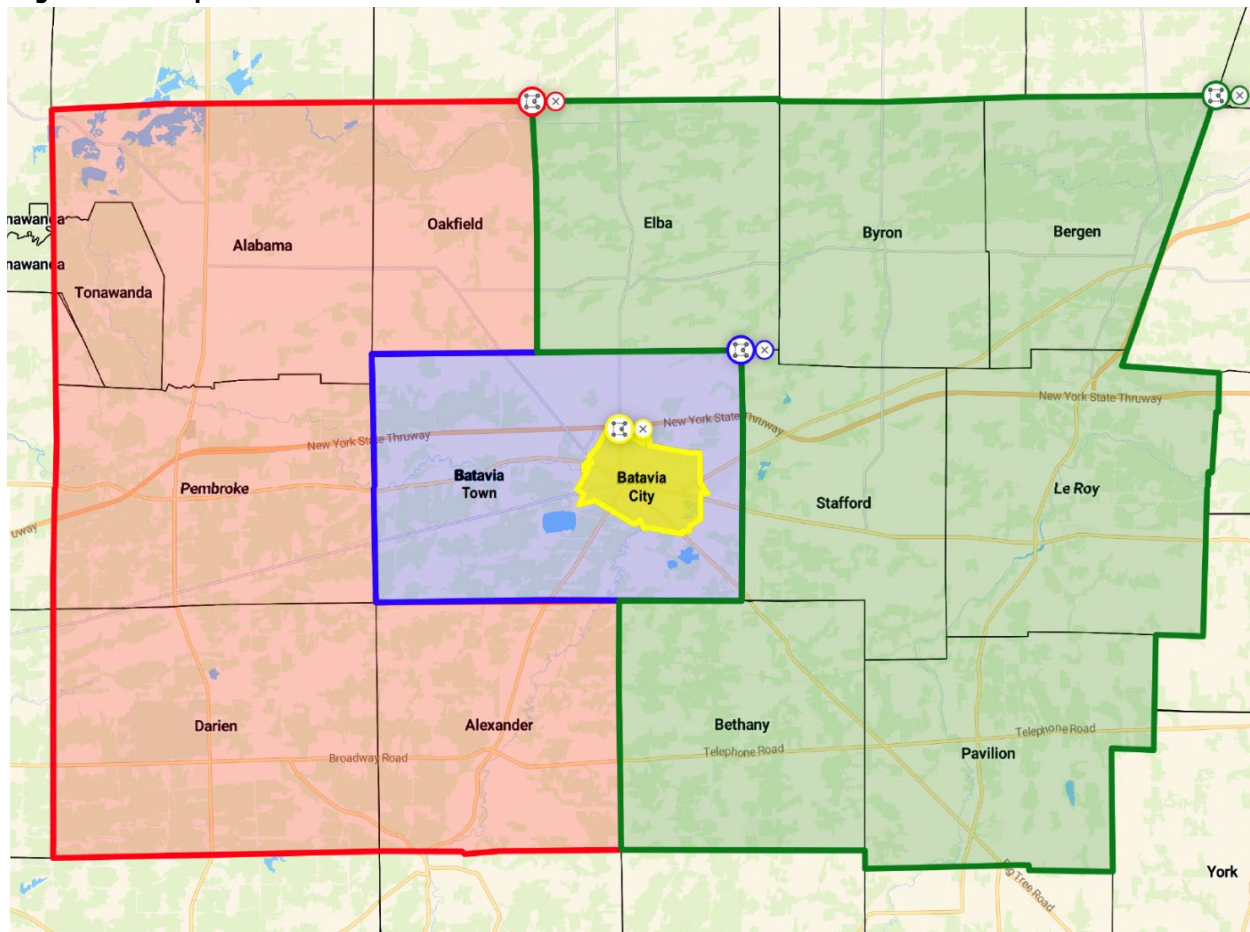
Top Commuting Destinations: Monroe and Erie Counties are the top destinations for Genesee County residents commuting to work.

Impact on Housing: Changes in job growth and commuting patterns influence the local housing market, with increased demand and competition for housing likely in areas with job growth and reduced demand in areas with job losses.

6. Housing Supply Analysis by Submarkets

To account for unique attributes within different sections of the county, the following housing supply and housing market analyses were organized into four Submarkets: East, West, Batavia Town, and Batavia City (see Figure 18). For the purposes of this study, the Submarkets consist of County Subdivisions as identified by the U.S. Census Bureau, which include Cities, Towns, and Reservations. Villages are contained within the Towns. ACS data was used to capture more detailed housing supply trends.

Figure 18: Map of Submarkets



Batavia City Submarket County Subdivisions	Batavia Town Submarket County Subdivisions	East Submarket County Subdivisions	West Submarket County Subdivisions
Cities: Batavia City	Towns: Batavia Town	Towns: Bergen, Bethany, Byron, Elba, Le Roy, Pavilion, Stafford	Towns: Alabama, Alexander, Darien, Oakfield, Pembroke Reservations: Tonawanda

Source: PolicyMap, U.S. Census Bureau, Urban Partners

Table 34 below summarizes the ACS population and household trends for the four submarkets. West Submarket is the most populated of the four with 20,963 residents and 8,328 households as of 2022, while Batavia Town Submarket reports the fewest residents at 6,309.

Table 34: Submarket Population Trends, 2012-2022

	2012 ACS	2022 ACS	Change (2012-2022)	% Change (2012-2022)
Population				
Genesee County Total	59,992	58,204	-1,788	-3.0%
Batavia City Submarket	15,472	15,510	38	0.2%
Batavia Town Submarket	6,790	6,309	-481	-7.1%
East Submarket	15,557	15,422	-135	-0.9%
West Submarket	22,173	20,963	-1,210	-5.5%
Households				
Genesee County Total	23,962	24,416	454	1.9%
Batavia City Submarket	6,440	7,370	930	14.4%
Batavia Town Submarket	2,949	2,764	-185	-6.3%
East Submarket	6,049	5,954	-95	-1.6%
West Submarket	8,524	8,328	-196	-2.3%

Source: U.S. Census Bureau, Urban Partners

Table 35 shows the ACS population trends for the 13 Towns, seven Villages, and one Reservation within Genesee County. Among the Towns, the Town of Oakfield added the most residents (237) and also grew the most as a percentage of its 2012 population (19.4%). The Towns of Elba and Batavia saw the biggest decreases in number of residents at -523 and -481, respectively, while the Tonawanda Reservation had the biggest population loss as a percentage of 2012 (-39.4%). Among Villages, Attica Village grew the most as a percentage of its 2012 population (51.9%), although that was only 27 residents. Elba Village experienced the largest population decline among villages at -30.2%.

Table 35: Population Trends by Jurisdiction, 2012-2022

	2012 Census	2022 Census	Change (2012-2022)	% Change (2012-2022)
County Total	59,992	58,204	-1,788	-3.0%
Alabama Town	1,808	2,038	230	12.7%
Alexander Town	1,860	2,078	218	11.7%
Alexander Village	608	507	-101	-16.6%
Attica Village (Genesee Co.)	52	79	27	51.9%
Batavia Town	6,790	6,309	-481	-7.1%
Batavia City	15,472	15,510	38	0.2%
Bergen Town	1,832	1,990	158	8.6%
Bergen Village	1,281	1,125	-156	-12.2%
Bethany Town	1,739	1,661	-78	-4.5%

Byron Town	2,331	1,951	-380	-16.3%
Corfu Village	847	852	5	0.6%
Darien Town	3,149	3,005	-144	-4.6%
Elba Town	1,957	1,646	-311	-15.9%
Elba Village	703	491	-212	-30.2%
Le Roy Town	3,249	3,275	26	0.8%
Le Roy Village	4,376	4,332	-44	-1.0%
Oakfield Town	1,221	1,458	237	19.4%
Oakfield Village	2,023	1,683	-340	-16.8%
Pavilion Town	2,449	2,264	-185	-7.7%
Pembroke Town	3,446	3,393	-53	-1.5%
Stafford Town	2,256	2,228	-28	-1.2%
Tonawanda Reservation	543	329	-214	-39.4%

Source: U.S. Census Bureau, Urban Partners

Housing Supply Analysis – Batavia City Submarket

The Batavia City Submarket represents 30.2% of the total County’s housing supply with a total of 7,872 units, according to the 2022 ACS. From 2012 to 2022, the total number of housing units in the Batavia City Submarket increased by 12.2%. The vacancy rate decreased to 6.4% with 502 vacant units in 2022, compared to 577 vacant units in 2012 (8.2% vacancy rate. See Table 36).

Table 36: Total Housing Units and Occupancy Status, Batavia City Submarket, 2012-2022

	2012 ACS	%	2022 ACS	%	Change 2012-2022	% Change 2012-2022
Total Housing Units	7,017	-	7,872	-	855	12.2%
Occupied Units	6,440	91.8%	7,370	93.6%	930	14.4%
Vacant Units	577	8.2%	502	6.4%	-75	-13.0%

Source: U.S. Census Bureau, Urban Partners

The 2022 ACS specifies that in the Batavia City Submarket, 19.7% of the vacant units (99) were for seasonal (recreational or occasional use)—increasing by 61 of such units from 2012 to 2022¹⁰. Additionally, the number of “other vacant” units increased by 57, which comprised 47.6% of all vacant units in 2022. Aside from vacant seasonal homes and other vacant units, there are 164 “conventionally” vacant homes, which include the remaining for rent, rented (not occupied), for sale, and sold units (not occupied. See Table 37 shown below).

Table 37: Vacancy Status, Batavia City Submarket, 2012-2022

	2012 ACS	%	2022 ACS	%	Change 2012-2022	% Change 2012-2022
Total Vacant Units	577		502		-75	-13.0%
For rent	157	27.2%	87	17.3%	-70	-44.6%
Rented, not occupied	23	4.0%	0	0.0%	-23	-100.0%
For sale only	81	14.0%	77	15.3%	-4	-4.9%
Sold, not occupied	96	16.6%	0	0.0%	-96	-100.0%
For seasonal use	38	6.6%	99	19.7%	61	160.5%
For migrant workers	0	0.0%	0	0.0%	0	-
Other vacant	182	31.5%	239	47.6%	57	31.3%

Source: U.S. Census Bureau, Urban Partners

Table 38 on the next page describes changes in tenure, or owner/renter characteristics for the Batavia City Submarket. The total number of occupied housing units saw a net increase of 930 units from 2012 to 2022—composed of an increase of 316 owner-occupied homes and 614 new renter-occupied homes. As a result, the homeownership rate dropped from 55.9% in 2012 to 53.1% in 2022.

¹⁰ “Other Vacant” units includes: foreclosed properties; units vacant due to the owners’ preferences and/or personal situation (owner does not want to rent/sell, owner is staying with family, owner is in assisted living, etc.); units vacant due to legal issues or disputes; unoccupiable properties (abandoned/condemned); units needing repairs before they can be sold or rented and units being repaired; and units used for storage of household furniture.

Table 38: Housing Tenure, Batavia City Submarket, 2012-2022

	2012 ACS	%	2022 ACS	%	Change 2012-2022	% Change 2012-2022
Total Occupied Units	6,440	-	7,370	-	930	14.4%
Owner-Occupied Units	3,598	55.9%	3,914	53.1%	316	8.9%
Renter-Occupied Units	2,842	44.1%	3,456	46.9%	614	21.6%

Source: U.S. Census Bureau, Urban Partners

A detailed breakdown of the age of housing stock by tenure for the Batavia City Submarket is shown in Table 39. It reveals that 86.3% of all housing units in the Batavia City Submarket were built before 1980. The ACS also reports that renter-occupied homes are newer than owner-occupied homes (3.6% of the renter-occupied housing were built in 2000 or later, compared to 1.0% of owner-occupied homes). Of the 7,370 occupied housing units in Batavia City Submarket, only 80 units were built in 2010 or later (1.1%).

Table 39: Age of Housing Stock by Tenure, Batavia City Submarket, 2022

	All Units	%	Owner- Occupied	%	Renter- Occupied	%
Built 2020 or later	0	0.0%	0	0.0%	0	0.0%
Built 2010 to 2019	80	1.1%	0	0.0%	80	2.3%
Built 2000 to 2009	83	1.1%	37	1.0%	46	1.3%
Built 1990 to 1999	425	5.8%	118	3.0%	307	8.9%
Built 1980 to 1989	430	5.8%	212	5.4%	218	6.3%
Built 1970 to 1979	781	10.6%	99	2.5%	682	19.7%
Built 1960 to 1969	530	7.2%	280	7.2%	250	7.2%
Built 1950 to 1959	1,029	14.0%	643	16.4%	386	11.2%
Built 1940 to 1949	528	7.2%	291	7.4%	237	6.9%
Built 1939 or earlier	3,484	47.3%	2,234	57.1%	1,250	36.2%

Source: U.S. Census Bureau, Urban Partners

A majority of homes in the Batavia City Submarket (54.2%) are one-unit detached structures (see Table 40 shown on the following page). According to the 2022 ACS, 94.3% of homeowners live in residential structures with just one unit. The largest segment of renter households resides in structures with two units (37.3%) and compared to homeowners, they are more evenly distributed in terms of units in structure. There are no mobile homes in the Batavia City Submarket.

Table 40: Units in Occupied Structure by Tenure, Batavia City Submarket, 2022

	All Units		Owner-Occupied		Renter-Occupied	
	Units	%	Units	%	Units	%
1 Unit, detached	3,997	54.2%	3,611	92.3%	386	11.2%
1 Unit, attached	181	2.5%	78	2.0%	103	3.0%
2 Units	1,425	19.3%	136	3.5%	1,289	37.3%
3 or 4 Units	680	9.2%	80	2.0%	600	17.4%
5 to 9 Units	372	5.1%	9	0.2%	363	10.5%
10 to 19 Units	111	1.5%	0	0.0%	111	3.2%
20 to 49 Units	172	2.3%	0	0.0%	172	5.0%
50 or more Units	432	5.9%	0	0.0%	432	12.5%
Mobile home	0	0.0%	0	0.0%	0	0.0%
Boat, RV, van, etc.	0	0.0%	0	0.0%	0	0.0%

Source: U.S. Census Bureau, Urban Partners

Income-Restricted Communities in Batavia City Submarket

There are 11 income-restricted communities in Batavia City Submarket that total 612 units. These units, which house low-income families, seniors, and veterans, currently represent approximately 16.1% of the rental market in Batavia City Submarket. Seven communities containing 246 units are supported by Low-Income Housing Tax Credits (LIHTC). Four communities are the U.S. Department of Agriculture’s Section 515 Rural Rental Housing Program (USDA Rural – Multifamily), comprising 112 units. Finally, two communities each are HUD Public Housing (197 units) and HUD Multifamily (169 units; see Table 41).

Table 41: List of Income-Restricted Communities, Batavia City Submarket

	Name	Jurisdiction	Type	Subsidized Units	Earliest Expiration Date
1	Edward Court	Batavia City	HUD Public Housing	49	N/A
2	400 Towers	Batavia City	HUD Public Housing	148	N/A
3	Bank Street Senior Apartments	Batavia City	LIHTC	37	2040
4	Charles Lesh Apartments	Batavia City	LIHTC	42	2039
5	Liberty Square	Batavia City	LIHTC	55	2036
6	Genesee Park Place Apartments	Batavia City	LIHTC / USDA Rural	32	2029
7	Havenwood Congregate Living	Batavia City	LIHTC / USDA Rural	32	2035
8	Meadows at South Main	Batavia City	LIHTC / USDA Rural	24	2022
9	Monsignor Kirby Apartments	Batavia City	HUD Multifamily	39	2022
10	Northside Meadows	Batavia City	LIHTC / USDA Rural	24	2023
11	Washington Towers	Batavia City	HUD Multifamily	130	2032

Source: HUD, PolicyMap, Urban Partners

Housing Supply Analysis – Batavia Town Submarket

The Batavia Town Submarket represents 11.3% of the total County’s housing supply with a total of 2,949 units, according to the ACS. From 2012 to 2022, the total number of housing units in the Batavia Town Submarket decreased by 185 units. The vacancy rate decreased to 11.7% with 323 vacant units in 2022, compared to 640 vacant units in 2012 (21.7% vacancy rate. See Table 42).

Table 42: Total Housing Units and Occupancy Status, Batavia Town Submarket, 2012-2022

	2012 ACS		2022 ACS		Change 2012-2022	% Change 2012-2022
		%		%		
Total Housing Units	3,122	-	2,861	-	-261	-8.4%
Occupied Units	2,949	94.5%	2,764	96.6%	-185	-6.3%
Vacant Units	173	5.5%	97	3.4%	-76	-43.9%

Source: U.S. Census Bureau, Urban Partners

The 2022 ACS specifies that in the Batavia Town Submarket, 49.5% of the vacant units (48) were “for seasonal use”—decreasing by 38 of such units from 2012 to 2022. Additionally, the number of units “for migrant workers” increased by 49, which comprised 50.5% of all vacant units in 2022, up from 0 in 2012. There are no “conventionally” vacant homes, which excludes seasonal and other vacant units (see Table 43 below).

Table 43: Vacancy Status, Batavia Town Submarket, 2012-2022

	2012 ACS		2022 ACS		Change 2012-2022	% Change 2010-2020
		%		%		
Total Vacant Units	173		97		-76	-43.9%
For rent	52	30.1%	0	0.0%	-52	-100.0%
Rented, not occupied	35	20.2%	0	0.0%	-35	-100.0%
For sale only	0	0.0%	0	0.0%	0	-
Sold, not occupied	0	0.0%	0	0.0%	0	-
For seasonal use	86	49.7%	48	49.5%	-38	-44.2%
For migrant workers	0	0.0%	49	50.5%	49	-
Other vacant	0	0.0%	0	0.0%	0	-

Source: U.S. Census Bureau, Urban Partners

Table 44 shown on the following page describes changes in tenure, or owner/renter characteristics for the Batavia Town Submarket. The total number of occupied housing units witnessed a net decrease of 185 units from 2012 to 2022—composed of an increase of 132 owner-occupied homes and 317 fewer renter-occupied homes. As a result, the homeownership rate increased from 78.3% in 2012 to 88.3% in 2022.

Table 44: Housing Tenure, Batavia Town Submarket, 2012-2022

	2012 ACS		2022 ACS		Change 2012-2022	% Change 2012-2022
Total Occupied Units	2,949	-	2,764	-	-185	-6.3%
Owner-Occupied Units	2,309	78.3%	2,441	88.3%	132	5.7%
Renter-Occupied Units	640	21.7%	323	11.7%	-317	-49.5%

Source: U.S. Census Bureau, Urban Partners

A detailed breakdown of the age of housing stock by tenure for the Batavia Town Submarket is shown in Table 45. It reveals that over half (58.2%) of all housing units in the Batavia Town Submarket were built before 1980. The ACS also reports that owner-occupied homes are newer than renter-occupied homes (14.7% of the owner-occupied housing were built in 2000 or later, compared to 12.1% of renter-occupied homes). Of the 2,764 occupied housing units in the Batavia Town Submarket, only 131 units were built in 2010 or later (4.8%).

Table 45: Age of Housing Stock by Tenure, Batavia Town Submarket, 2022

	All Units		Owner- Occupied		Renter- Occupied	
	Units	%	Units	%	Units	%
Built 2020 or later	32	1.2%	32	1.3%	0	0.0%
Built 2010 to 2019	99	3.6%	80	3.3%	19	5.9%
Built 2000 to 2009	266	9.6%	246	10.1%	20	6.2%
Built 1990 to 1999	473	17.1%	473	19.4%	0	0.0%
Built 1980 to 1989	285	10.3%	268	11.0%	17	5.3%
Built 1970 to 1979	284	10.3%	259	10.6%	25	7.7%
Built 1960 to 1969	379	13.7%	319	13.1%	60	18.6%
Built 1950 to 1959	268	9.7%	192	7.9%	76	23.5%
Built 1940 to 1949	150	5.4%	129	5.3%	21	6.5%
Built 1939 or earlier	528	19.1%	443	18.2%	85	26.3%

Source: U.S. Census Bureau, Urban Partners

A majority of homes in the Batavia Town Submarket (62.6%) are one-unit detached structures (see Table 46 on the next page). According to the 2022 ACS, 69.1% of the homeowners live in residential structures with just one unit. The largest segment of renter households resides in single-family detached structures (26.0%) but compared to homeowners, they are more distributed in terms of units in structures. Mobile homes make up 19.1% of the overall occupied housing stock in the Batavia Town Submarket.

Table 46: Units in Occupied Structure by Tenure, Batavia Town Submarket, 2022

	All Units		Owner-Occupied		Renter-Occupied	
	Units	%	Units	%	Units	%
1 Unit, detached	1,730	62.6%	1,646	67.4%	84	26.0%
1 Unit, attached	83	3.0%	41	1.7%	42	13.0%
2 Units	261	9.4%	192	7.9%	69	21.4%
3 or 4 Units	123	4.5%	53	2.2%	70	21.7%
5 to 9 Units	39	1.4%	0	0.0%	39	12.1%
10 to 19 Units	0	0.0%	0	0.0%	0	0.0%
20 to 49 Units	0	0.0%	0	0.0%	0	0.0%
50 or more Units	0	0.0%	0	0.0%	0	0.0%
Mobile home	528	19.1%	509	20.9%	19	5.9%
Boat, RV, van, etc.	0	0.0%	0	0.0%	0	0.0%

Source: U.S. Census Bureau, Urban Partners

Income-Restricted Communities in Batavia Town Submarket

There is one income-restricted community in the Batavia Town Submarket that totals 56 units. These units currently represent approximately 17.3% of the rental market in the Batavia Town Submarket. The community is supported by LIHTC (see Table 47).

Table 47: List of Income-Restricted Communities, Batavia Town Submarket

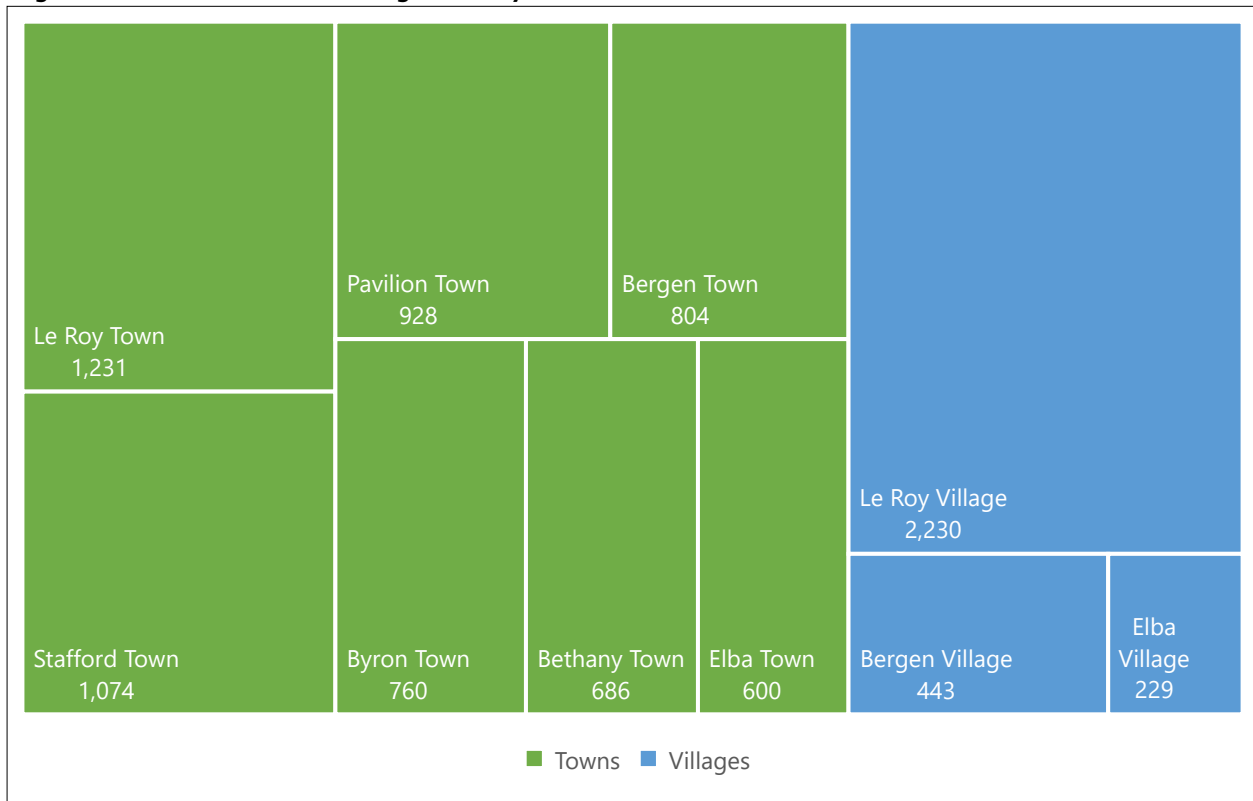
	Name	Jurisdiction	Type	Subsidized Units	Earliest Expiration Date
1	Big Tree Glen	Batavia Town	LIHTC	56	2046

Source: HUD, PolicyMap, Urban Partners

Housing Supply Analysis – East Submarket

The East Submarket consists of the Towns of Bergen, Bethany, Byron, Elba, Le Roy, Pavilion, and Stafford, as well as the Villages of Bergen, Elba, Le Roy, and Pavilion. The Submarket represents 34.5% of the total county’s housing supply with a total of 8,985 units, according to the 2022 ACS. Figure 19 illustrates the distribution of the East Submarket’s housing supply by jurisdiction. The Village of Le Roy reports the largest supply among the jurisdictions, with 2,230 housing units, while Elba Village reports the fewest, at 229 units.

Figure 19: Number of Housing Units by Jurisdiction, East Submarket, 2022



Source: U.S. Census Bureau, Urban Partners

According to the ACS, from 2012 to 2022, the total number of housing units in the East Submarket increased by 9 units (0.1%). The vacancy rate increased to 7.3% with 657 vacant units in 2022, compared to 452 vacant units in 2012 (a 45.4% increase. See Table 48).

Table 48: Total Housing Units and Occupancy Status, East Submarket, 2012-2022

	2012 ACS	%	2022 ACS	%	Change 2012-2022	% Change 2012-2022
Total Housing Units	8,976	-	8,985	-	9	0.1%
Occupied Units	8,524	95.0%	8,328	92.7%	-196	-2.3%
Vacant Units	452	5.0%	657	7.3%	205	45.4%

Source: U.S. Census Bureau, Urban Partners

The 2022 ACS specifies that in the East Submarket, over half (56.0%, or 368) of the vacant units were listed as “other vacant”, increasing by 150 (or 68.8%) since 2012. Various categories saw increases: vacant units listed as “rented, not occupied” grew from 16 in 2012 to 84 in 2022 (425.0%); “sold, not occupied” grew from 14 in 2012 to 65 in 2022 (364.3%); and “for seasonal, recreational, or occasional use” grew from 53 in 2012 to 102 in 2022 (92.5%). Aside from vacant seasonal homes and other vacant units, there are 187 “conventionally” vacant homes (see Table 49).

Table 49: Vacancy Status, East Submarket, 2012-2022

	2012 ACS		2022 ACS		Change 2012-2022	% Change 2012-2022
	ACS	%	ACS	%		
Total Vacant Units	452		657		205	45.4%
For rent	74	16.4%	0	0.0%	-74	-100.0%
Rented, not occupied	16	3.5%	84	12.8%	68	425.0%
For sale only	77	17.0%	14	2.1%	-63	-81.8%
Sold, not occupied	14	3.1%	65	9.9%	51	364.3%
For seasonal use	53	11.7%	102	15.5%	49	92.5%
For migrant workers	0	0.0%	24	3.7%	24	-
Other vacant	218	48.2%	368	56.0%	150	68.8%

Source: U.S. Census Bureau, Urban Partners

Table 50 describes changes in tenure, or owner/renter characteristics for the East Submarket. The total number of occupied housing units saw a net decrease of 196 units from 2012 to 2022—composed of 76 fewer owner-occupied homes and 120 fewer renter-occupied homes. The homeownership rate increased slightly from 80.9% in 2012 to 81.9% in 2022.

Table 50: Housing Tenure, East Submarket, 2012-2022

	2012 ACS		2022 ACS		Change 2012-2022	% Change 2012-2022
	ACS	%	ACS	%		
Total Occupied Units	8,524	-	8,328	-	-196	-2.3%
Owner-Occupied Units	6,897	80.9%	6,821	81.9%	-76	-1.1%
Renter-Occupied Units	1,627	19.1%	1,507	18.1%	-120	-7.4%

Source: U.S. Census Bureau, Urban Partners

A detailed breakdown of the age of housing stock by tenure for the East Submarket is shown in Table 51 on the following page. It reveals that 63.9% of all housing units in the East Submarket were built before 1970. The ACS also reports that, as a percentage of the total, there are slightly more owner-occupied homes built in 2000 or later (8.7%) than renter-occupied homes (2.5%); there are 585 such owner-occupied units compared to 38 renter-occupied units. Of the 8,328 occupied housing units in the East Submarket, only 164 units were built in 2010 or later (2.0%), while 3,074 (36.9%) were built in 1939 or before.

Table 51: Age of Housing Stock by Tenure, East Submarket, 2022

	All Units		Owner-Occupied		Renter-Occupied	
	Units	%	Units	%	Units	%
Built 2020 or later	4	0.1%	4	0.1%	0	0.0%
Built 2010 to 2019	160	1.9%	160	2.4%	0	0.0%
Built 2000 to 2009	459	5.5%	421	6.2%	38	2.5%
Built 1990 to 1999	549	6.6%	457	6.7%	92	6.1%
Built 1980 to 1989	891	10.7%	730	10.7%	161	10.7%
Built 1970 to 1979	939	11.3%	809	11.9%	130	8.6%
Built 1960 to 1969	1,169	14.0%	835	12.2%	334	22.2%
Built 1950 to 1959	808	9.7%	617	9.1%	191	12.7%
Built 1940 to 1949	275	3.3%	212	3.1%	63	4.2%
Built 1939 or earlier	3,074	36.9%	2,576	37.8%	498	33.1%

Source: U.S. Census Bureau, Urban Partners

A majority of homes in the East Submarket (79.2%) are one-unit detached structures (see Table 52). According to the 2022 ACS, 89.8% of homeowners live in residential structures with just one unit detached. The largest segment of renter households also resides in one unit detached structures (31.3%) but compared to homeowners, they are more distributed in terms of units in structure. Mobile homes make up 5.2% of the overall occupied housing stock in the East Submarket and the second-largest category of homeowners at 5.3%.

Table 52: Units in Occupied Structure by Tenure, East Submarket, 2022

	All Units		Owner-Occupied		Renter-Occupied	
	Units	%	Units	%	Units	%
1 Unit, detached	6,594	79.2%	6,122	89.8%	472	31.3%
1 Unit, attached	171	2.1%	130	1.9%	41	2.7%
2 Units	236	2.8%	63	0.9%	173	11.5%
3 or 4 Units	272	3.3%	13	0.2%	259	17.2%
5 to 9 Units	523	6.3%	132	1.9%	391	26.0%
10 to 19 Units	73	0.9%	0	0.0%	73	4.8%
20 to 49 Units	27	0.3%	0	0.0%	27	1.8%
50 or more Units	1	0.0%	0	0.0%	1	0.1%
Mobile home	431	5.2%	361	5.3%	70	4.6%
Boat, RV, van, etc.	0	0.0%	0	0.0%	0	0.0%

Source: U.S. Census Bureau, Urban Partners

Income-Restricted Communities in the East Submarket

Table 53 on the following page is a detailed list of the six income-restricted communities in the East Submarket that total 157 units. These units currently represent approximately 10.4% of the total rental market in the East Submarket. Two communities are supported by the USDA Rural Development - Multifamily, two are HUD Multifamily, and two are supported by LIHTC or combination of the above programs.

Table 53: List of Income-Restricted Communities, East Submarket

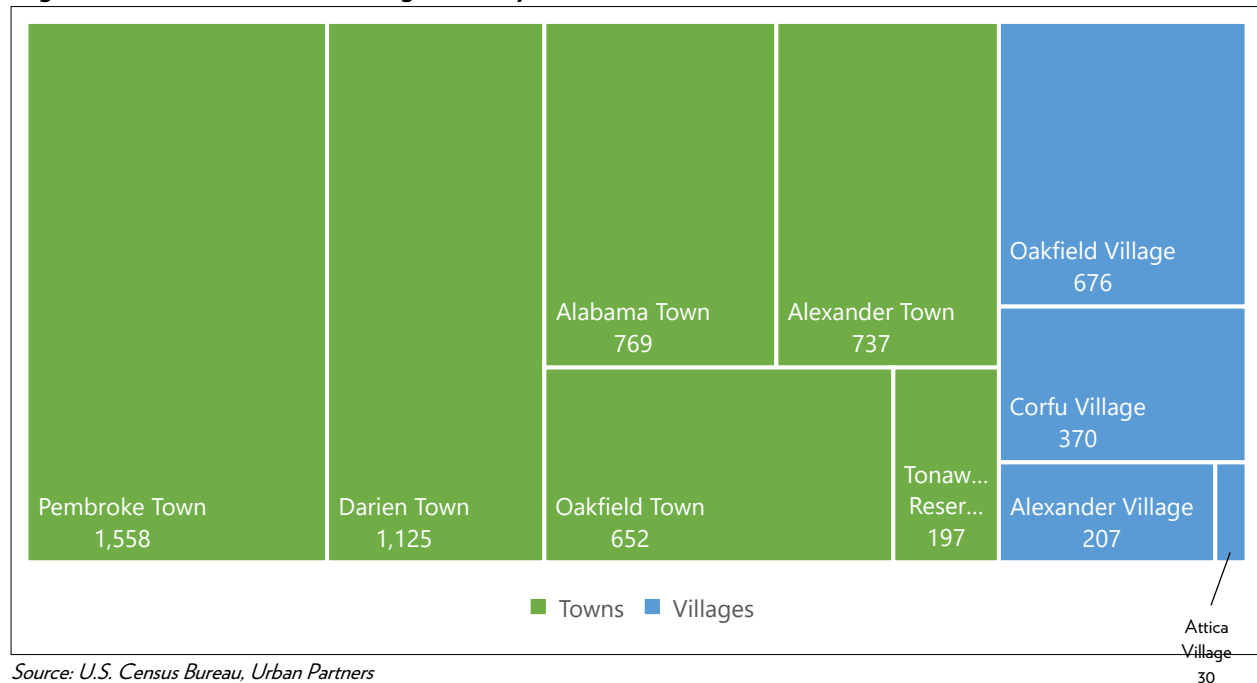
	Name	Jurisdiction	Type	Subsidized Units	Earliest Expiration Date
1	Bergen Meadows	Bergen	LIHTC / USDA Rural	24	2042
2	Hillcrest Apartments	Bethany	USDA Rural	8	2029
3	La Rosa Villas	Le Roy	LIHTC	39	2050
4	Leroy Meadows	Le Roy	HUD Multifamily	40	2040
5	Lifetime Community Apartments	Le Roy	HUD Multifamily / USDA Rural	10	2023
6	Village Square	Le Roy	USDA Rural	36	2036

Source: HUD, PolicyMap, Urban Partners

Housing Supply Analysis – West Submarket

The West Submarket consists of the Towns of Alabama, Alexander, Darien, Oakfield, and Pembroke, the Tonawanda Reservation, and the Villages of Alexander, Attica (Genesee County Portion), Corfu, and Oakfield. The Submarket represents 24.3% of the county’s total housing supply with a total of 6,321 units, according to the Census. Figure 18 illustrates the distribution of the West Submarket housing supply by jurisdiction. Pembroke Town reports the largest supply among the jurisdictions with 1,558 housing units, while the Genesee County portion of Attica Village reports the fewest, at 30 units.

Figure 20: Number of Housing Units by Jurisdiction, West Submarket, 2022



Source: U.S. Census Bureau, Urban Partners

According to the ACS, from 2012 to 2022, the total number of housing units in the West Submarket decreased by 1.6%. The vacancy rate remained relatively stable with 367 vacant units in 2022, compared to 373 vacant units (5.8%) in 2012, resulting in the same occupancy level (94.2%) and percent change (-1.6%) as well (see Table 54).

Table 54: Total Housing Units and Occupancy Status, West Submarket, 2012-2022

	2012 ACS	%	2022 ACS	%	Change 2012-2022	% Change 2012-2022
Total Housing Units	6,422	-	6,321	-	-101	-1.6%
Occupied Units	6,049	94.2%	5,954	94.2%	-95	-1.6%
Vacant Units	373	5.8%	367	5.8%	-6	-1.6%

Source: U.S. Census Bureau, Urban Partners

The 2022 ACS specifies that in the West Submarket, 13.4% of the vacant units (49) were for rent—increasing by 27 of such units from 2012 to 2022. Additionally, the number of “other vacant” units decreased by 47, which comprised 48.2% of all vacant units in 2022. Aside from vacant seasonal homes and other vacant units, there are 130 “conventionally” vacant homes (see Table 55).

Table 55: Vacancy Status, West Submarket, 2012-2022

	2012 ACS	%	2022 ACS	%	Change 2012-2022	% Change 2012-2022
Total	373		367		-6	-1.6%
For rent	22	5.9%	49	13.4%	27	122.7%
Rented, not occupied	7	1.9%	0	-	-7	-100.0%
For sale only	59	15.8%	54	14.7%	-5	-8.5%
Sold, not occupied	16	4.3%	21	5.7%	5	31.3%
For seasonal use	45	12.1%	60	16.4%	15	33.3%
For migrant workers	0	-	6	1.6%	6	-
Other vacant	224	60.1%	177	48.2%	-47	-21.0%

Source: U.S. Census Bureau, Urban Partners

Table 56 describes changes in tenure, or owner/renter characteristics for the West Submarket. The total number of occupied housing units saw a net decrease of 95 units from 2012 to 2022—consisting of a decrease of 69 owner-occupied homes and a decrease of 26 renter-occupied homes. As a result, the homeownership rate rose very slightly from 79.6% in 2012 to 79.7% in 2022.

Table 56: Housing Tenure, West Submarket, 2012-2022

	2012 ACS	%	2022 ACS	%	Change 2012-2022	% Change 2012-2022
Total Occupied Units	6,049	-	5,954	-	-95	-1.6%
Owner-Occupied Units	4,812	79.6%	4,743	79.7%	-69	-1.4%
Renter-Occupied Units	1,237	20.4%	1,211	20.3%	-26	-2.1%

Source: U.S. Census Bureau, Urban Partners

A detailed breakdown of the age of housing stock by tenure for the West Submarket is shown in Table 57 on the following page. It reveals that over half (56.2%) of all housing units in the West Submarket were built before 1960. The ACS also reports that owner-occupied homes are newer than renter-occupied homes (7.6% of the owner-occupied housing were built in 2000 or later, compared to 0.3% of renter-occupied homes). Of the 5,954 occupied housing units in East Submarket, only 147 units were built in 2010 or later (2.5%).

Table 57: Age of Housing Stock by Tenure, West Submarket, 2022

	All Units		Owner-Occupied		Renter-Occupied	
	Units	%	Units	%	Units	%
Built 2020 or later	4	0.1%	4	0.1%	0	0.0%
Built 2010 to 2019	143	2.4%	141	2.4%	2	0.0%
Built 2000 to 2009	323	5.4%	305	5.1%	18	0.3%
Built 1990 to 1999	511	8.6%	424	7.1%	87	1.5%
Built 1980 to 1989	383	6.4%	329	5.5%	54	0.9%
Built 1970 to 1979	685	11.5%	530	8.9%	155	2.6%
Built 1960 to 1969	561	9.4%	466	7.8%	95	1.6%
Built 1950 to 1959	379	6.4%	360	6.1%	19	0.3%
Built 1940 to 1949	355	6.0%	237	4.0%	118	2.0%
Built 1939 or earlier	2,610	43.8%	1,947	32.7%	663	11.1%

Source: U.S. Census Bureau, Urban Partners

A majority of homes in the West Submarket (77.0%) are one-unit detached structures (see Table 58). According to the 2022 ACS, 90.8% of homeowners live in residential structures with just one unit. The largest segment of renter households resides in structures of 3 or 4 units (30.3%) and compared to homeowners, they are more distributed in terms of units in structure. Mobile homes make up 5.9% of the overall occupied housing stock and 11.3% of the renter-occupied homes in the West Submarket.

Table 58: Units in Occupied Structure by Tenure, West Submarket, 2022

	All Units		Owner-Occupied		Renter-Occupied	
	Units	%	Units	%	Units	%
1 Unit, detached	4,583	77.0%	4,278	90.2%	305	25.2%
1 Unit, attached	71	1.2%	30	0.6%	41	3.4%
2 Units	401	6.7%	158	3.3%	243	20.1%
3 or 4 Units	392	6.6%	25	0.5%	367	30.3%
5 to 9 Units	48	0.8%	0	-	48	4.0%
10 to 19 Units	5	0.1%	5	0.1%	0	-
20 to 49 Units	68	1.1%	2	0.0%	66	5.5%
50 or more Units	4	0.1%	0	-	4	0.3%
Mobile home	350	5.9%	213	4.49%	137	11.3%
Boat, RV, van, etc.	32	0.5%	32	0.7%	0	-

Source: U.S. Census Bureau, Urban Partners

Income-Restricted Communities in West Submarket

Table 59 on the following page is a detailed list of the five income-restricted communities in the West Submarket that total 100 units. These units currently represent approximately 8.3% of the total rental market in the West Submarket. The income-restricted units are supported by HUD Multifamily, LIHTC, or USDA Rural Development - Multifamily and are in Alabama, Alexander, Oakfield, and Pembroke.

Table 59: List of Income-Restricted Communities, East Submarket

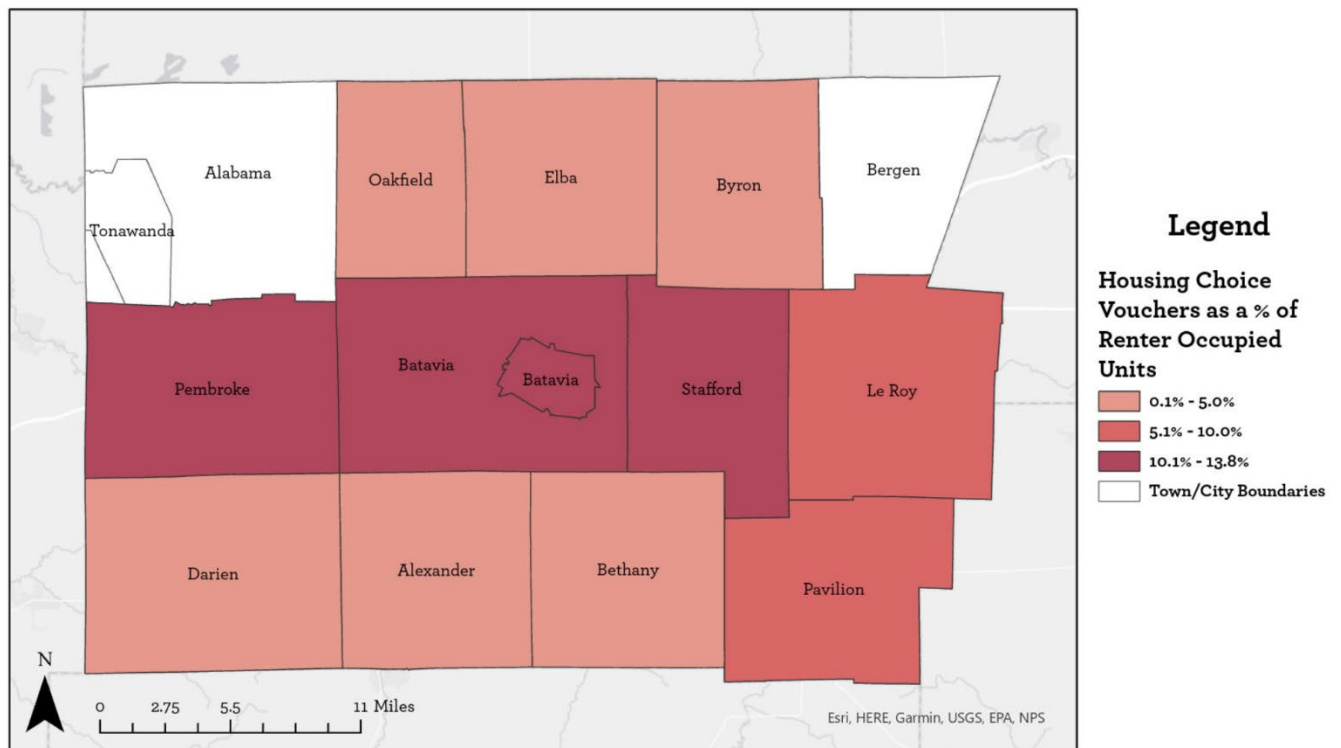
	Name	Jurisdiction	Type	Subsidized Units	Earliest Expiration Date
1	Leisuretimer's Apartments	Alabama	HUD Multifamily/USDA Rural	22	2031
2	Colony Run Townhouses	Alexander	LIHTC	24	2025
3	Garibaldi Street Residence	Oakfield	HUD Multifamily	4	N/A
4	Schoolhouse Manor	Oakfield	USDA RD - Multifamily	26	2032
5	Corfu Meadows	Corfu	LIHTC / USDA RD - Multifamily	24	N/A

Source: HUD, PolicyMap, Urban Partners

Housing Supply Analysis – Housing Choice Vouchers

As of June 2023, HUD reports that a total of 438 Genesee County households are using Housing Choice Vouchers (HCV), formerly known as Section 8 vouchers, within the county. Figure 19 shows the percentage of HCV holders as a percentage of renter-occupied units by Census Tracts within the county's Towns, City, and Reservation.

Figure 21: Genesee County Housing Choice Voucher Concentrations by Census Tract, 2023



Source: HUD, Urban Partners

As the map shows, the Towns of Alabama and Bergen and Tonawanda Reservation contain no households using HCVs. In six towns, HCVs constitute between 0.1% and 5.0% of their renter occupied units. The Towns of Le Roy and Pavilion have HCV households as between 5.1% and 10.0% of their rental units. The highest percentage of HCVs—10.0% to 13.8% of rental units—are located in the Towns of Batavia, Pembroke, and Stafford and the City of Batavia.

Key Takeaways of Housing Supply Analysis

Submarkets Defined: The housing analysis is organized into four Submarkets: East, West, Batavia Town, and Batavia City, each comprising various county subdivisions including towns, villages, and a portion of a reservation.

Population Trends: The West Submarket is the most populous, with 20,963 residents, while Batavia Town Submarket has the fewest residents at 6,309. The population generally declined across all submarkets from 2012 to 2022, except for a slight increase in Batavia City Submarket.

Housing Units: Batavia City Submarket experienced a 12.2% increase in housing units from 2012 to 2022, while the Batavia Town Submarket saw a decrease of 8.4%. The vacancy rate decreased in both submarkets, with Batavia Town having a significant reduction in vacant units.

Housing Tenure: The Batavia City Submarket saw an increase in renter-occupied units (21.6%), leading to a slight drop in the homeownership rate to 53.1%. In contrast, the Batavia Town Submarket experienced a decrease in renter-occupied units and an increase in the homeownership rate to 88.3%.

Age of Housing Stock: Most housing units in the Batavia City Submarket (86.3%) and Batavia Town Submarket (58.2%) were built before 1980. The East and West Submarkets also have a significant portion of older housing, with over half of the homes in the West Submarket built before 1960.

Housing Stock by Type: Most homes in all submarkets are one-unit detached structures, with Batavia City having a more diverse distribution of housing types, including multi-unit structures. Mobile homes are notably present in Batavia Town and West Submarkets.

Vacancy Status: Batavia City Submarket saw a reduction in vacant units from 2012 to 2022, with a significant portion of vacant homes used for seasonal purposes. The East Submarket saw a 45.4% increase in vacant units, with a significant rise in "other vacant" and seasonal use homes. The West Submarket maintained a stable vacancy rate over the same period.

Income-Restricted Housing: Each submarket has income-restricted housing communities supported by HUD, LIHTC, or USDA programs. Batavia City Submarket has 10 income-restricted communities totaling 557 units, representing 16.1% of its rental market. Other submarkets, such as Batavia Town, East, and West, also have income-restricted housing but in smaller quantities.

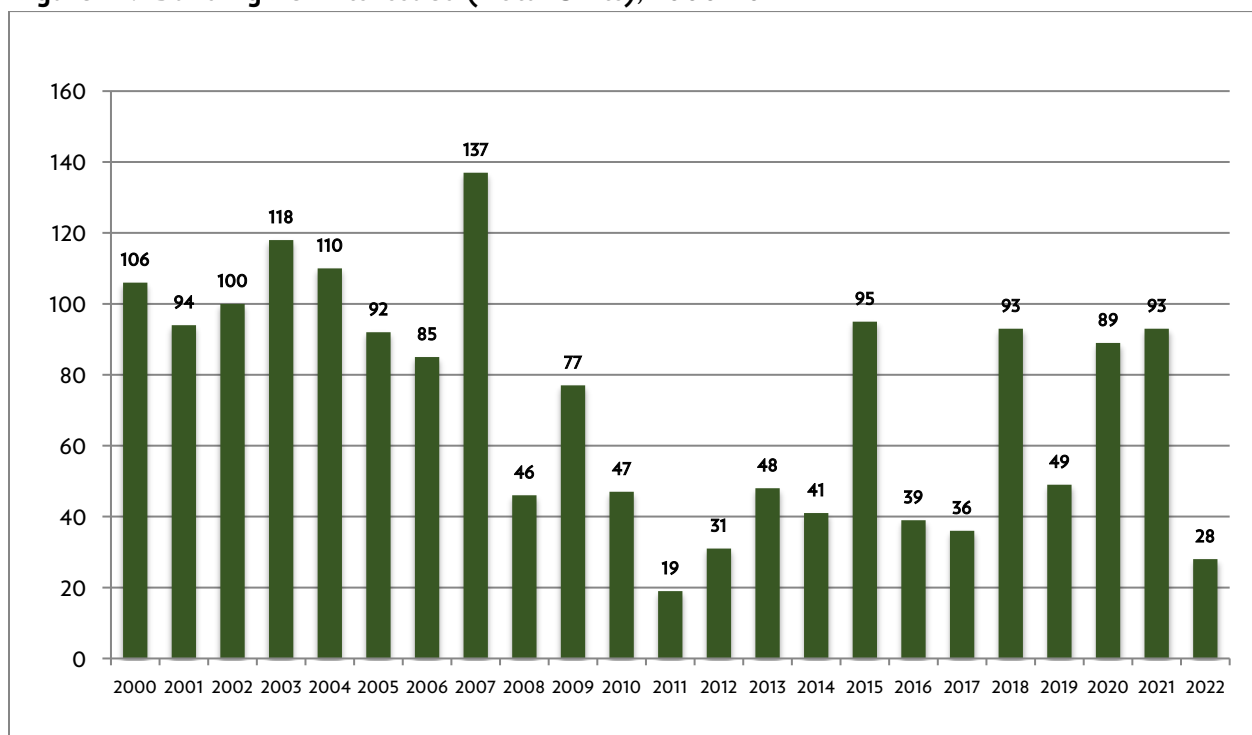
Housing Choice Vouchers: As of 2023, 438 households in Genesee County use Housing Choice Vouchers (HCV), with the highest concentrations in Batavia City and the towns of Batavia, Pembroke, and Stafford.

7. Home Building Activity

Residential Building Permits Issued in Genesee County

Shown below in Figure 20 are the U.S. Department of Housing and Urban Development’s data on the number of authorized residential building permits in Genesee County. From 2000 to 2022, Genesee County issued a total of 1,673 permits, equivalent to 73 units per year. The pace of permitting prior to the Great Recession (2000 to 2007) was approximately 105 units per year. During the Great Recession and the subsequent years of recovery (2008 to 2011), Genesee County authorized as few as 19 building permits (in 2011). Genesee County has been permitting approximately 58 units per year since 2012.

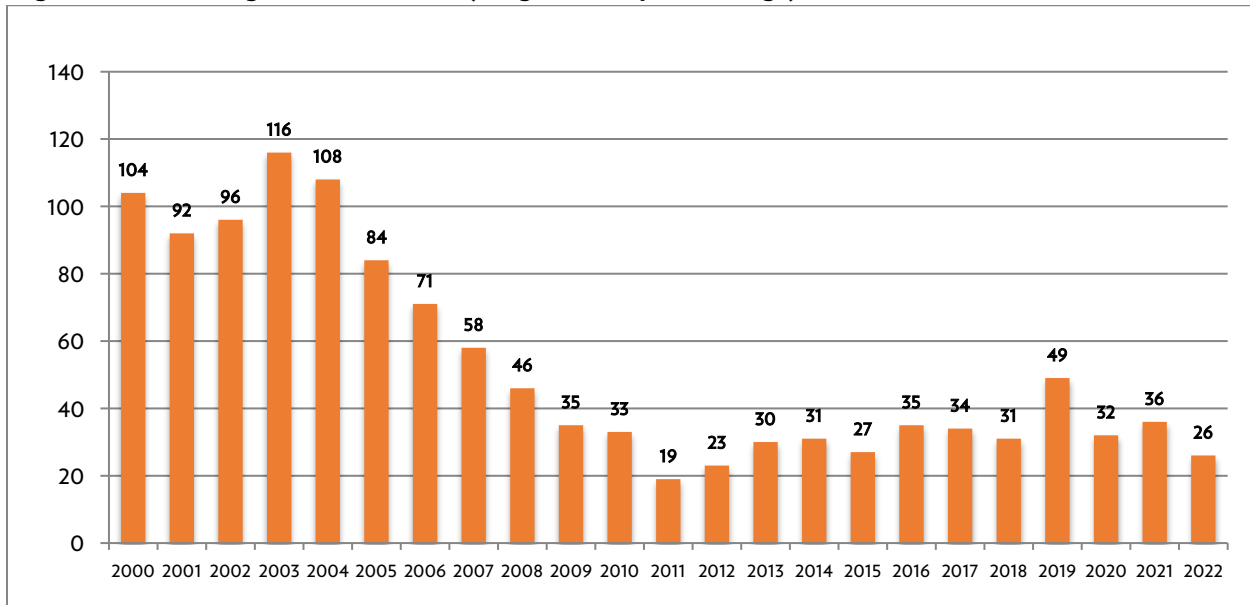
Figure 22: Building Permits Issued (Total Units), 2000-2022



Source: HUD State of the Cities Data Systems (SOCDS), Urban Partners

The peak period for single-family permitting was 2003 when 116 units were permitted. Starting in 2004, however, the permitting of single-family homes started to drop until hitting an average of 33 units per year during the Great Recession and the recovery period (2008 to 2011). Even after the nation’s recovery the rate of single-family homes permitted remained similar. From 2012 to 2022, Genesee permitted an average of 32 single-family units per year (see Figure 21 on the following page).

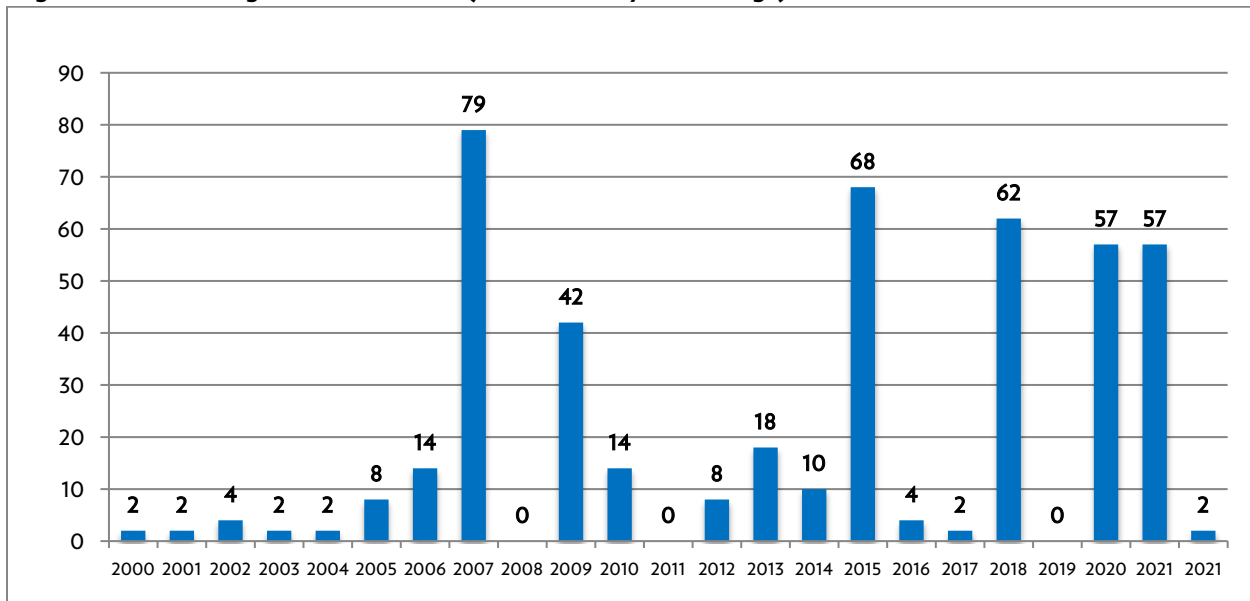
Figure 23: Building Permits Issued (Single-Family Dwellings), 2000-2022



Source: HUD State of the Cities Data Systems (SOCDS), Urban Partners

As illustrated in Figure 22 below, Genesee permitted an average of 20 units annually in multi-family dwellings from 2000 to 2022. There were multiple years when very few or no multi-family permits were issued—including 2008, 2011, 2019—and there were other years when large numbers of units were permitted (i.e., 68 units in 2015, 57 units in 2020 and 2021).

Figure 24: Building Permits Issued (Multi-Family Dwellings), 2000-2022



Source: HUD State of the Cities Data Systems (SOCDS), Urban Partners

Permitting Activity by Jurisdictions

Table 60 summarizes the building permit activity for each of the 20 permit issuing jurisdictions located in Genesee County. The Town of Batavia issued the most building permits from 2000 to 2022, reporting a total of 425 units, followed by the City of Batavia (254 units). Permits issued between the City and Town of Batavia totaled 679 units, representing 40.6% of the county’s total permits during this period.

Table 60: Building Permits Issued by Jurisdiction, 2000-2022

	Units in Single-Family Structures	Units in Multi-Family Structures	Total Units	% of County Total
Alabama Town	37	6	43	2.6%
Alexander Town	48	2	50	3.0%
Alexander Village	15	0	15	0.9%
Batavia Town	271	154	425	25.4%
Batavia City	41	213	254	15.2%
Bergen Town	78	0	78	4.7%
Bergen Village	3	0	3	0.2%
Bethany Town	62	0	62	3.7%
Byron Town	22	0	22	1.3%
Corfu Village	8	0	8	0.5%
Darien Town	144	2	146	8.7%
Elba Town	36	0	36	2.2%
Elba Village	5	0	5	0.3%
Le Roy Town	126	8	134	8.0%
Le Roy Village	22	66	88	5.3%
Oakfield Town	34	6	40	2.4%
Oakfield Village	1	0	1	0.1%
Pavilion Town	78	0	78	4.7%
Pembroke Town	112	0	112	6.7%
Stafford Town	73	0	73	4.4%
	1,216	457	1,673	

Source: HUD State of the Cities Data Systems (SOCDS), Urban Partners

Residential Building Projects

Over the past decade there have been multiple new housing projects approved throughout the county, consisting of single-family detached homes, manufactured homes, and apartments. Some developments are under construction or still in the construction phase yet to be built-out. Several others are in the pre-construction phases.

Figure 23 details the projects in various stages of construction as of this report:

Figure 25: New Housing Projects in Various Stages of Construction

<p>Name of Development: Oakwood Hills Location: Town of Batavia Number of Units: 136 on 90 lots Type: Single-family detached homes Year Approved: 2013 Status: More than half have been constructed</p>	
<p>Name of Development: Fieldcrest Meadows Location: Village of Corfu Number of Units: 17 Type: Single-family detached homes Year Approved: 2015 Status: 2 units built</p>	
<p>Name of Development: Ellicott Station Location: City of Batavia Number of Units: 55 Type: Apartments Year Approved: 2018 Status: Under construction; still making progress; likely will be sold to a new company</p>	
<p>Name of Development: Brickhouse Commons Location: Town of Pembroke Number of Units: 30 in 5 buildings Type: Apartments Year Approved: 2021 Status: Phase 1 (first mixed-use building containing 6 apartments) complete and occupied</p>	

<p>Name of Development: Ivy Village Location: Village of Le Roy Number of Units: 60 Type: Single-family patio homes for seniors Year Approved: 2022 Status: Under construction</p>	
<p>Name of Development: MedTech Landing Apartments Location: Town of Batavia Number of Units: 80 in 7 buildings Type: Apartments Year Approved: 2023 Status: Phase 1 under construction</p>	
<p>Name of Development: Countryside Apartments Location: Town of Pembroke Number of Units: 96 in 4 buildings Type: Apartments Year Approved: 2023 Status: Land clearing underway</p>	

Source: Genesee County, Genesee County Economic Development Center

Other smaller projects under construction include:

- 6 apartment units over retail at 101-103 Main St., City of Batavia
- 4 apartment units over retail at 105-107 Main St., City of Batavia
- 4 apartment units over retail at 15-17 Main St., Village of Le Roy
- 2 apartment units over retail at 5-7 Jackson St., City of Batavia

The following projects are in various stages of pre-development as of this report:

1. **Name of Developer:** Batavia Special Needs Apartments
Location: City of Batavia
Units: 20
Type: Apartments
Year Approved: 2021

2. **Name of Developer:** Just Chez Realty
Location: City of Batavia
Units: 2
Type: Apartments
Year Approved: 2021

3. **Name of Developer:** Franklin Real Estate & Development
Location: Town of Pembroke
Units: 16
Type: Apartments
Year Approved: 2022

4. **Name of Project:** Cook Properties
Location: Town of Batavia
Units: 76
Type: Manufactured housing
Year Approved: 2022

5. **Name of Project:** North Pointe
Location: City of Batavia
Units: 30
Type: Single-family patio homes
Year Approved: 2024

Key Takeaways of Home Building Activity

Total Building Permits: From 2000 to 2022, Genesee County issued 1,673 residential building permits, averaging 73 units per year, with a peak rate of 105 units per year before the Great Recession.

Permit Fluctuations: The number of building permits issued annually varied greatly, reflecting economic conditions and housing demand over the years.

Single-Family Home Permits: The highest number of single-family permits issued was in 2003 with 116 units. Post-recession, the average has been 32 single-family units per year.

Multi-Family Permits: Multi-family dwelling permits averaged 20 units per year from 2000 to 2022, with significant fluctuations, including peaks in 2015 (68 units) and 2020-2021 (57 units each year).

Top Permitting Jurisdictions: The Town of Batavia issued the most permits (425 units), followed by the City of Batavia (254 units), together accounting for 40.6% of all permits in the county.

Ongoing Housing Projects: Key ongoing projects include Oakwood Hills in the Town of Batavia (136 units), Ellicott Station in the City of Batavia (55 units), and MedTech Landing Apartments in the Town of Batavia (80 units).

Newer Developments: Projects such as Brickhouse Commons and Ivy Village focus on apartments and senior housing, with several others in pre-construction phases.

Pre-Development Projects: Upcoming developments include Batavia Special Needs Apartments (20 units), Cook Properties (76 manufactured homes), and North Pointe (30 single-family patio homes).

Small-Scale Projects: Additional smaller residential projects are underway, including apartments over retail spaces in Batavia and Le Roy.

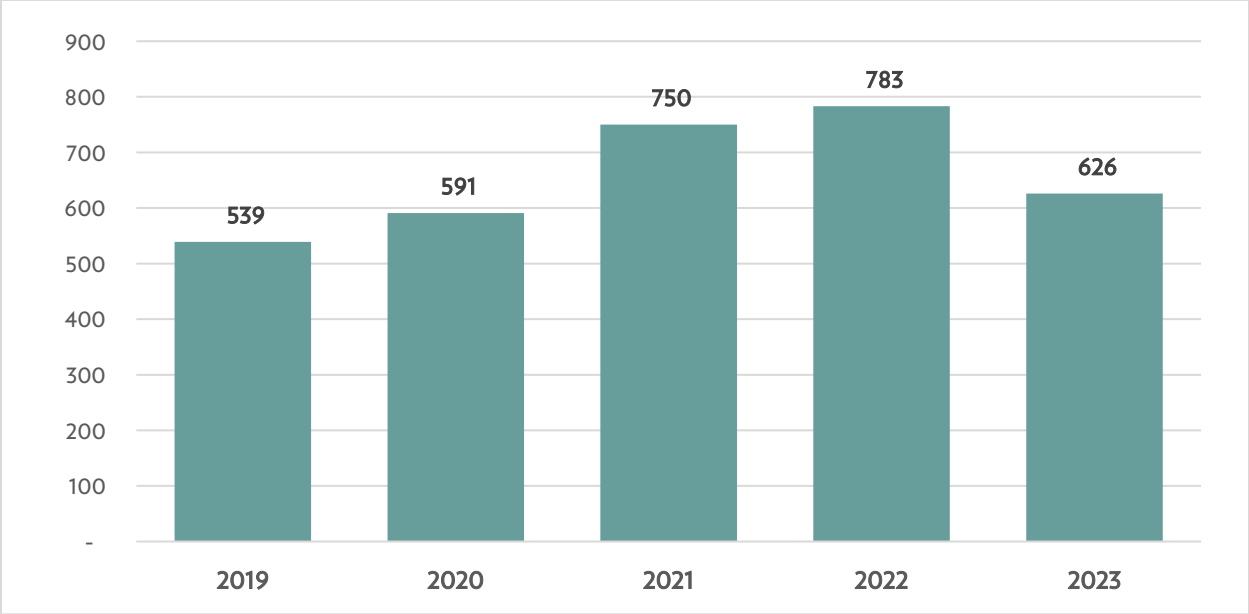
8. For-Sale Housing Market Analysis

Summary of Recently Sold Homes

To understand the for-sale housing market in Genesee County, Urban Partners examined market conditions for single-family detached homes, duplexes/triplexes, townhouses, mobile/manufactured homes, and rural homesteads. For this analysis, we obtained records of home sales from *RealQuest*—a comprehensive real estate database service from CoreLogic—for a 5-year period starting in January 2019 and ending in December 2023.

As evidenced by 3,250 home sales examined during the 5-year study period, Genesee County’s homeownership market is very active. Figure 24 illustrates the number of sales in Genesee County over the 5-year study period. Sales volume peaked in 2022 with 783 sales before tapering down in 2023. The 626 sales in 2023 are 5.9% more than 2019.

Figure 26: Number of Sales by Year in Genesee County (2019-2023)



Source: *RealQuest, Urban Partners*

The median sale price during the 5-year study period was \$143,050, or \$92.08 per square foot, “SF” henceforth). Single-family detached is the dominant home type in the county, representing 83.5% of the transactions with a median sale price of \$150,000, or \$100.13 per SF. The sale of 327 duplexes and triplexes represented 10.1% of the sales in the county (with a median sale price of \$100,000, or \$49.24 per SF), while 123 rural homesteads were sold for a median price of \$220,000 or \$116.96 per SF. The sale of other home types include: mobile/manufactured homes (75 sales with a median sale price of \$53,500, or \$54.59 per SF) and townhouses (12 sales with a median sale price of \$198,450, or \$158.13 per SF (see Table 61 on the following page).

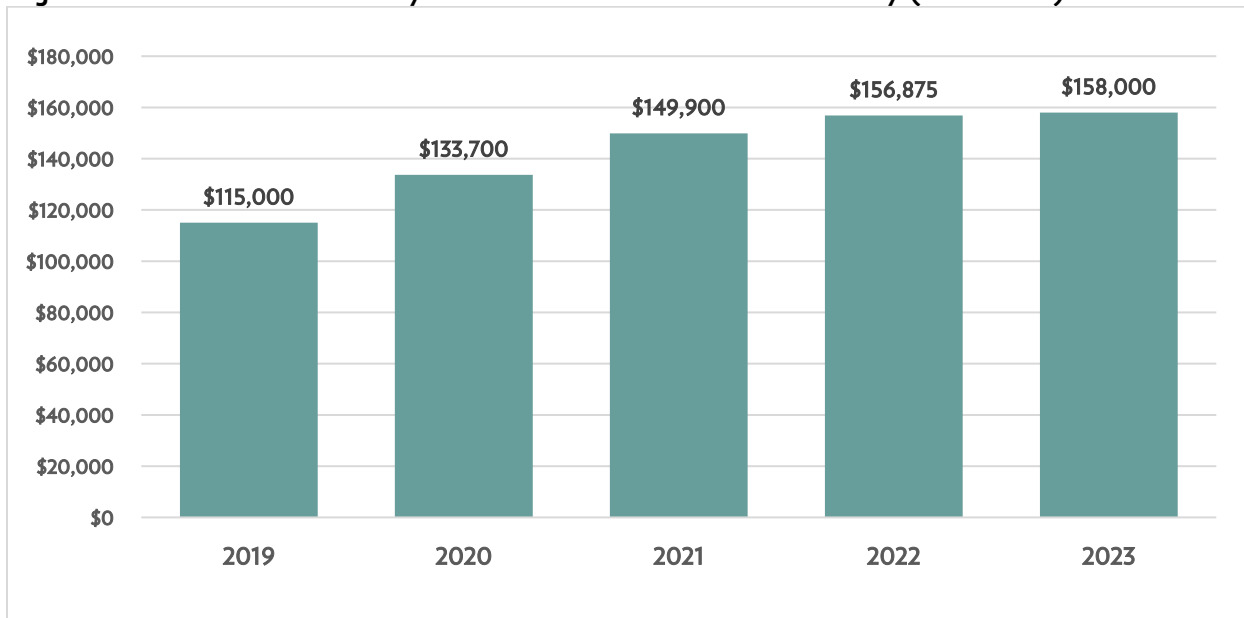
Table 61: Breakdown of Home Sales in Genesee County (2019-2023)

	No. of Transactions	% of Transactions	Median Sale Price	Median Square Footage	Median Price Per SF
Single-Family Detached	2,713	83.5%	\$150,000	1,498	\$100.13
Duplex/Triplex	327	10.1%	\$100,000	2,031	\$49.24
Rural Homestead	123	3.8%	\$220,000	1,881	\$116.96
Mobile/Manufactured Homes	75	2.3%	\$53,500	980	\$54.59
Townhouse	12	0.4%	\$198,450	1,236	\$158.13
Total	3,250	100.0%	\$143,050	1,554	\$92.08

Source: RealQuest, Urban Partners

Since 2019, home prices have been rapidly increasing, with the median price in that year at \$115,000, or \$73.30 per SF. Increasing at an annualized rate of 8.3%, the median price reported in 2023 was \$158,000 or \$104.33 per SF (See Figure 25).

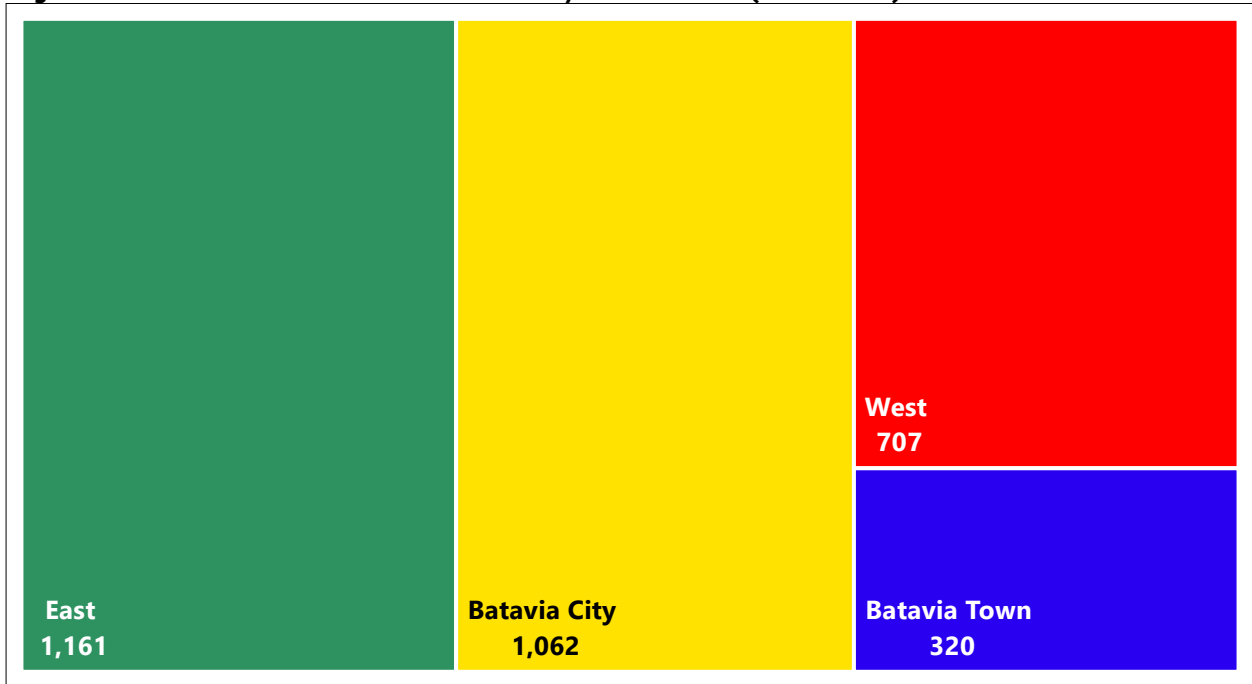
Figure 27: Median Sale Price by Year Home Sold in Genesee County (2019-2023)



Source: RealQuest, Urban Partners

Figure 26 shown on the following page is the distribution of the 3,250 sales transactions in Genesee County by submarkets (see map of the submarkets in Figure 16 on page 34). The 1,161 sales transactions in the East Submarket represented 35.7% of all sales in the county, followed by Batavia City with 1,062 sales (32.7%), the West Submarket with 1,707 (21.8%), and Batavia Town with 320 (9.8%).

Figure 28: Number of Sales Transactions by Submarkets (2019-2023)



Source: RealQuest, Urban Partners

Figure 27 shows the median sale price by submarkets for the 5-year study period. The Town of Batavia reported the highest median sale price of \$179,500, followed by the West Submarket (\$160,000), the East Submarket (\$150,000), and the City of Batavia (\$120,000).

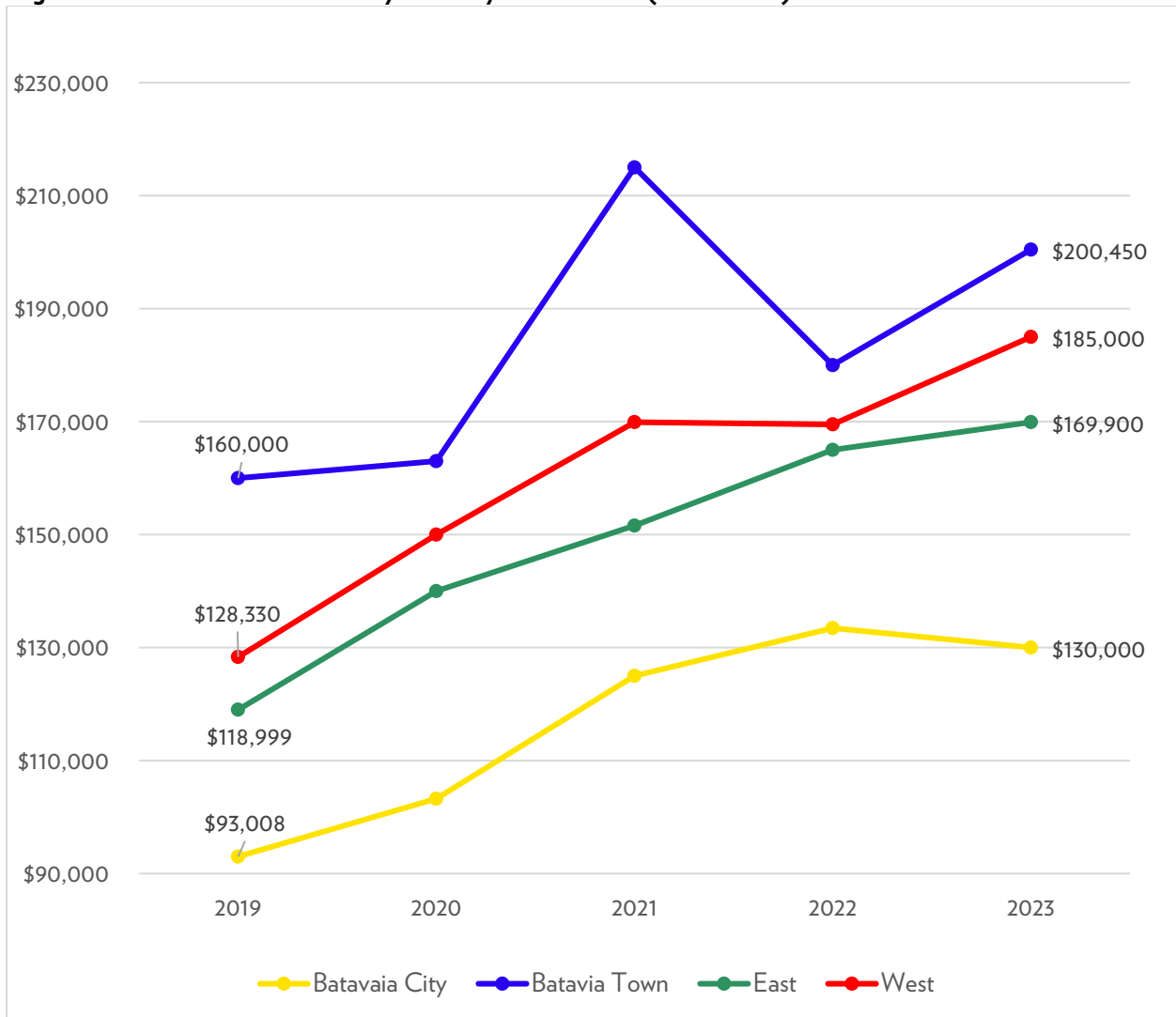
Figure 29: Median Sale Price by Submarkets (2019-2023)



Source: RealQuest, Urban Partners

As illustrated above, the median sale price increased at an annualized rate of 8.3% in Genesee County in the study period. Figure 28 shows the median sale price by submarkets by year. The highest price escalation was in the West Submarket, which rose from \$128,330 in 2019 to \$185,000 in 2023 (equivalent to a 44.2% increase). Though reporting the highest median sale price of \$200,450 among the four submarkets in 2023, Batavia Town experienced the lowest percentage increase (25.3% from 2019 to 2023).

Figure 30: Median Sale Price by Year by Submarket (2019-2023)



Source: RealQuest, Urban Partners

Single-Family Detached Homes

Table 62 summarizes the sales transactions for single-family detached homes by the year homes were built. Overall, there was a wide range of home sale prices in Genesee County, from \$10,000 to \$750,000, with the median sale price of \$150,000 (or \$100.13 per SF). Approximately half of the homes sold during the 5-year study period were built prior to 1970 (1,223 homes, or 45.1% of all single-family sales). The median sale price increased with newer housing stock, with the newest homes built after 2010 selling for a median sale price of \$230,000.

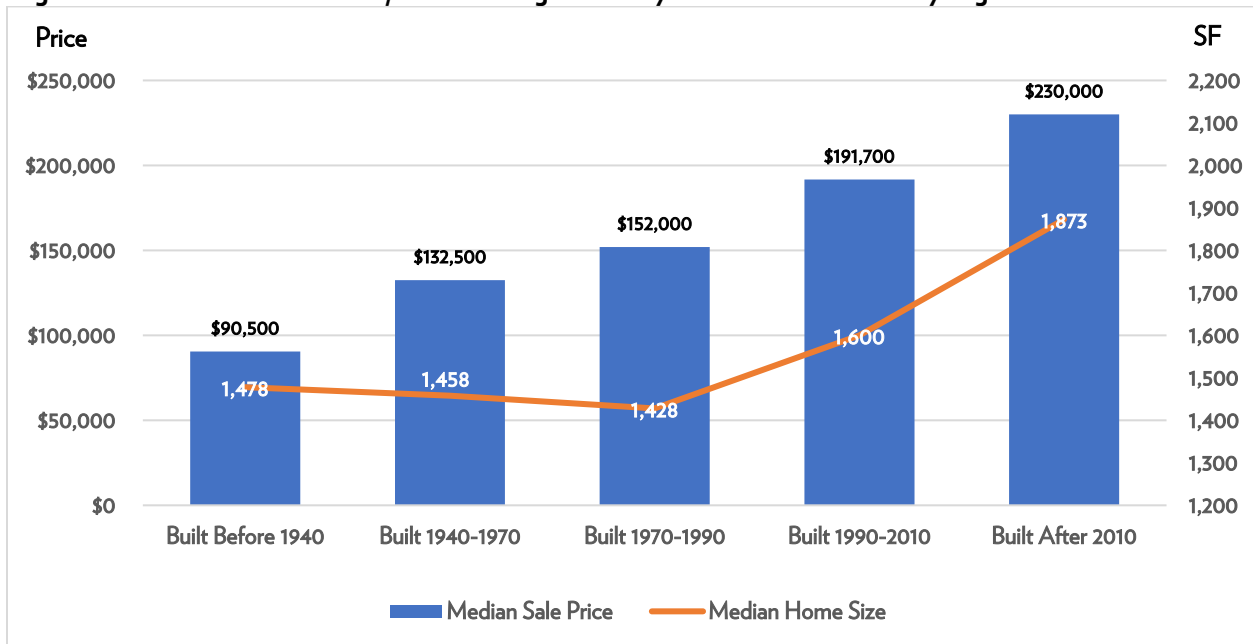
Table 62: Single Family Sales by Age of Home (2019-2023)

	No. of Transactions	% of Transactions	Median Sale Price	Price Range	Median Square Footage	Median Price Per SF
Home Built Before 1940	417	15.4%	\$90,500	\$10,000 - \$425,000	1,478	\$61.23
Home Built 1940-1970	806	29.7%	\$132,500	\$12,000 - \$370,000	1,458	\$90.88
Home Built 1970-1990	691	25.5%	\$152,000	\$10,000 - \$425,000	1,428	\$106.44
Home Built 1990-2010	674	24.8%	\$191,700	\$10,000 - \$750,000	1,600	\$119.81
Home Built After 2010	125	4.6%	\$230,000	\$12,750 - \$675,000	1,873	\$122.80
Total	2,713	100.0%	\$150,000	\$10,000 - \$750,000	1,498	\$100.13

Source: RealQuest, Urban Partners

It should be noted that older homes built prior to 1990 reported less than 1,500 SF of interior living space, while homes built after 2010 were nearly 1,900 SF. Aligning with national trends, larger home sizes are contributing to higher prices in Genesee County (see Figure 29).

Figure 31: Median Sale Price/Size of Single-Family Detached Homes by Age of Homes



Source: RealQuest, Urban Partners

Single-Family Sales by Production Home Builders

Table 63 summarizes single-family home sales from “production home builders”— defined as national/regional residential developers engaged in scaled production of homes. The 19 homes sold by Production Builders—all built at the Oakwood Hills development in the Town of Batavia—represented less than 1% of all single-family homes sold during the study period.

- Ryan Homes/NVR (11 sales)
- Wallco Construction Inc (8 sales)

The sale prices for the 19 single-family homes sold by production builders ranged from \$120,000 to \$390,150, with a median sale price of \$ 237,060 (or \$121.94 per SF).

Table 63: Single-Family Detached Homes by Production Builders (2019-2023)

Sold by	No. of Transactions	Median Sale Price	Price Range	Median Square Footage	Median Price Per SF
Ryan Homes/NVR	11	\$223,440	\$205,655-\$ 243,745	1,944	\$114.94
Wallco Construction	8	\$304,550	\$120,000-\$390,150	2,048	\$148.71
Total	19	\$237,060	\$120,000-\$ 390,150	1,944	\$121.94

Source: RealQuest, Urban Partners

Figure 32: Home Types at Oakwood Hills in the Town of Batavia



86XX Pine Oak Circle sold by Ryan Homes

51XX Laurel Oak Way sold by Wallco Construction

Duplex/Triplex

Duplex and triplex sales represented 10.1% of the total number of residential transactions in the county during the aforementioned 5-year period. Overall, the 327 duplex and triplex units were sold for a median sale price of \$100,00, or \$49.24 per SF. As summarized in Table 64, 83.2% of the duplexes and triplexes sold in the county in the last five years were built before 1970 (a total of 272 units). Only two units were constructed in 2010 or later which commanded a sale price of \$242,150, or \$87.67 per SF.

Table 64: Duplex/Triplex Sales by Age of Home (2019-2023)

	No. of Transactions	% of Transactions	Median Sale Price	Price Range	Median Square Footage	Median Price Per SF
Home Built Before 1940	169	51.7%	\$90,000	\$25,000 - \$255,000	2,024	\$44.47
Home Built 1940-1970	103	31.5%	\$106,000	\$10,000-\$290,000	1,965	\$53.94
Home Built 1970-1990	35	10.7%	\$130,000	\$25,000 - \$350,000	1,964	\$66.19
Home Built 1990-2010	18	5.5%	\$172,500	\$44,500 - \$435,000	2,122	\$81.29
Home Built After 2010	2	0.6%	\$242,150	\$32,500 - \$451,800	2,762	\$87.67
Total	327	100.0%	\$100,000	\$10,000 - \$451,800	2,031	\$49.24

Source: RealQuest, Genesee County, Urban Partners

Figure 33: Sample of Duplex/Triplex Sales



Duplex in Town of Batavia (sold in July 2022)

Triplex in Town of Le Roy (sold in October 2023)

Based on sales records, it appears that most duplexes and triplexes are being used as rental properties. In the 5-year study period, 67.6% of the duplexes/triplexes (221 units) were purchased by investors.

Rural Homestead

Rural Homestead sales represented 3.8% of the total number of residential transactions in the county during the aforementioned 5-year period. Overall, the 123 rural homestead units were sold for a median sale price of \$220,000, or \$116.96 per SF. The median lot size for rural homesteads was 19.7 acres. As summarized in Table 65, 49.6% of the rural homesteads sold in the county in the study period were built before 1970 (a total of 61 units). Newly built rural homesteads (constructed in 2010 or later) are commanding relatively low prices—with a median sale price of \$220,000, or \$110.55 per SF.

Table 65: Rural Homestead Sales by Age of Home (2019-2023)

	No. of Transactions	% of Transactions	Median Sale Price	Price Range	Median Square Footage	Median Price Per SF	Median Lot Size (Acres)
Home Built Before 1940	15	12.2%	\$180,000	\$10,977 - \$339,000	1,777	\$101.29	31.1
Home Built 1940-1970	46	37.4%	\$212,500	\$11,400 - \$550,000	1,817	\$116.98	18.5
Home Built 1970-1990	17	13.8%	\$164,945	\$14,000 - \$345,000	1,728	\$95.45	17.2
Home Built 1990-2010	34	27.6%	\$302,000	\$25,000 - \$724,999	2,085	\$144.84	19.2
Home Built After 2010	11	8.9%	\$220,000	\$50,000 - \$750,000	1,990	\$110.55	28.4
Total	123	100.0%	\$220,000	\$10,977 - \$750,000	1,881	\$116.96	19.7

Source: RealQuest, Genesee County, Urban Partners

Figure 34: Rural Homestead Sold in the Town of Darien



6,001 SF rural homestead on 28.4 acres, sold for \$750,000 in June 2023

Mobile/Manufactured Homes

Homes categorized as mobile or manufactured represented 2.3% of residential transactions in the county during the aforementioned 5-year period. Overall, the 75 mobile/manufactured homes were sold for a median sale price of \$53,500, or \$54.59 per SF (see Table 66).

Table 66: Mobile/Manufactured Home Sales (2019-2023)

	No. of Transactions	Median Sale Price	Price Range	Median Square Footage	Median Price Per SF
Mobile Homes	63	\$50,000	\$10,000 - \$230,000	980	\$51.02
Manufactured Homes	12	\$133,600	\$25,000 - \$185,000	1,352	\$98.82
Total	75	\$53,500	\$10,000 - \$230,000	980	\$54.59

Source: RealQuest, Urban Partners

Figure 35: Sample of Mobile/Manufactured Home Sales



Mobile home in Town of Pavilion
(sold in June 2021)

Manufactured home in Town of Bethany
(sold in December 2023)

Submarket Analysis - Batavia City Submarket

The City of Batavia reported a total of 1,062 sales transactions, which account for 32.7% of the county’s total in the 5-year study period. The median sale price of a single-family home in the City of Batavia was \$126,249, or \$89.16 per SF. Duplex and triplex units accounted for 18.8% of all transactions, with a median sale price of \$89,497 and a median price per SF of \$45.58. Lastly, ten townhouses sold for a median sale price of \$184,200, or \$149.03 per SF (see Table 67).

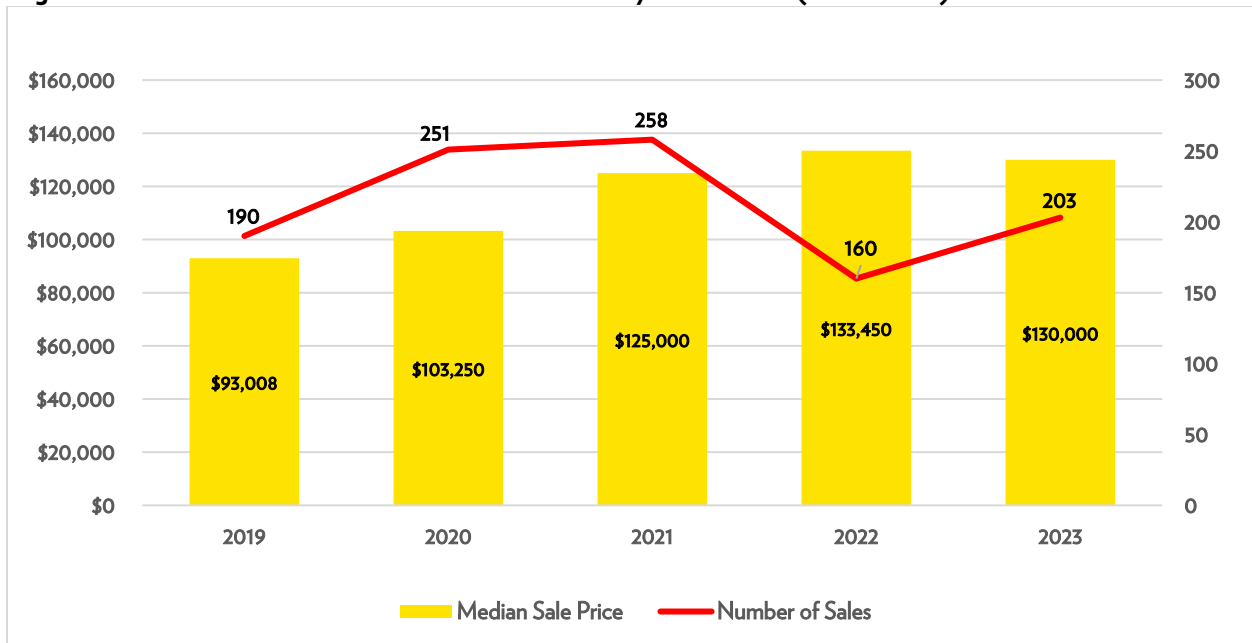
Table 67: Breakdown of Home Sales in the City of Batavia (2019-2023)

	No. of Transactions	% of Transactions	Median Sale Price	Median Size (SF)	Median Price Per SF
Single-Family Detached	852	80.2%	\$126,249	1,416	\$89.16
Duplex/Triplex	200	18.8%	\$89,497	1,964	\$45.58
Rural Homestead	-	-	-	-	-
Mobile/Manufactured Homes	-	-	-	-	-
Townhouse	10	0.9%	\$184,200	1,236	\$149.03
Total	1,062	100.0%	\$120,000	1,500	\$80.00

Source: RealQuest, Urban Partners

Home prices in the City of Batavia have shown steady growth since 2019. The median price in that year was \$93,008, equivalent to \$59.20 per SF. By 2023, the median price had risen to \$130,000, or \$85.50 per SF, reflecting an annualized growth rate of 8.7%. While sales volume reached its peak in 2021 with 258 transactions, it decreased notably in 2022 to 160 sales. The 203 transactions recorded in 2023 remained higher than the pre-pandemic volume of 190 sales in 2019 (see Figure 34).

Figure 36: Home Sales Characteristics in the City of Batavia (2019-2023)



Source: RealQuest, Urban Partners

Table 68 summarizes the single-family sales in the City of Batavia by the year homes were built. Approximately three out of five (59.7%) single-family homes sold in the City of Batavia were built prior to 1970 (509 transactions), and the highest median sale price of \$215,000 was reported for single-family homes built after 2010.

Table 68: Single Family Sales in the City of Batavia by Age of Home (2019-2023)

	No. of Transactions	% of Transactions	Median Sale Price	Price Range	Median Square Footage	Median Price Per SF
Home Built Before 1940	184	21.6%	\$85,000	\$17,000 - \$205,000	1,355	\$62.75
Home Built 1940-1970	325	38.1%	\$125,000	\$13,000 - \$350,000	1,440	\$86.81
Home Built 1970-1990	193	22.7%	\$140,000	\$10,000 - \$385,000	1,381	\$101.38
Home Built 1990-2010	139	16.3%	\$174,000	\$29,000 - \$550,000	1,635	\$106.42
Home Built After 2010	11	1.3%	\$215,000	\$40,000 - \$500,000	1,911	\$112.51
Total	852	100.0%	\$126,249	\$10,000 - \$550,000	1,416	\$89.16

Source: RealQuest, Urban Partners

Figure 37: Highest Priced Home Sale in the City of Batavia (2019-2023)



3,410 SF single-family home sold for \$550,000 in September 2023

Figure 38: Median Priced Home Sale in the City of Batavia (2019-2023)



1,416 SF single-family home sold for \$130,000 in March 2023

Submarket Analysis - Batavia Town Submarket

The Town of Batavia reported a total of 320 sales transactions, which account for 9.8% of the county’s total in the 5-year study period. The median sale price of a single-family home in the Town of Batavia was \$175,000, or \$112.76 per SF. Duplex and triplex units accounted for 4.7% of all transactions, with a median sale price of \$113,400, or \$60.00 per SF. Rural homesteads numbered 21 units and represented 6.6% of total sales, with a median sale price of \$210,000, or \$126.81 per SF. Additionally, there were three mobile/manufactured homes and two townhouses sold, with median prices of \$32,000 and \$240,000 respectively (see Table 69).

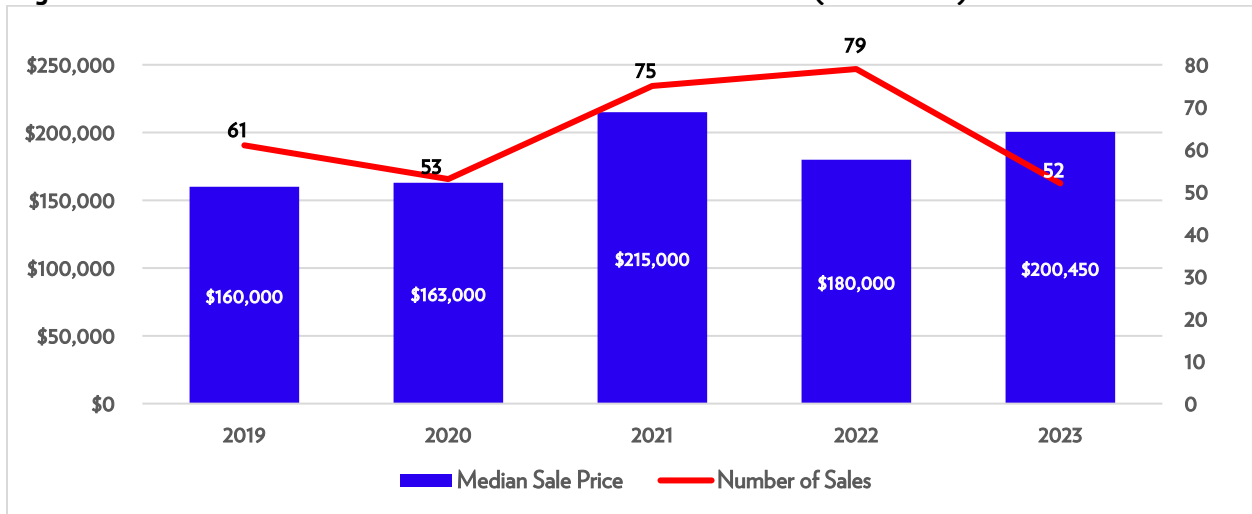
Table 69: Breakdown of Home Sales in the Town of Batavia (2019-2023)

	No. of Transactions	% of Transactions	Median Sale Price	Median Size (SF)	Median Price Per SF
Single-Family Detached	279	87.2%	\$175,000	1,552	\$112.76
Duplex/Triplex	15	4.7%	\$113,400	1,890	\$60.00
Rural Homestead	21	6.6%	\$210,000	1,656	\$126.81
Mobile/Manufactured Homes	3	0.9%	\$32,000	980	\$32.65
Townhouse	2	0.6%	\$240,000	1,474	\$162.82
Total	320	100.0%	\$179,500	1,578	\$113.79

Source: RealQuest, Urban Partners

Home prices in the Town of Batavia have shown steady growth since 2019—with a notable spike in 2021 when seven homes at the Oakhill development sold for an average price exceeding \$312,000. The median price in 2019 was \$160,000, equivalent to \$98.20 per SF. By 2023, the median price had risen to \$200,450 (or \$130.50 per SF) reflecting an annualized growth rate of 5.8%. While sales volume reached its peak in 2022 with 79 transactions, it decreased notably in 2023 (52 sales), dropping below the pre-pandemic volume of 61 sales in 2019 (see Figure 36).

Figure 39: Home Sales Characteristics in the Town of Batavia (2019-2023)



Source: RealQuest, Urban Partners

Table 70 summarizes the single-family sales in the Town of Batavia by the year homes were built. Slightly more than half (55.9%) of the single-family homes sold in the Town of Batavia were built after 1990 (156 transactions), and the highest median sale price of \$246,873 was reported for single-family homes built after 2010.

Table 70: Single Family Sales in the Town of Batavia by Age of Home (2019-2023)

	No. of Transactions	% of Transactions	Median Sale Price	Price Range	Median Square Footage	Median Price Per SF
Home Built Before 1940	8	2.9%	\$58,500	\$30,000 - \$104,000	1,479	\$39.55
Home Built 1940-1970	50	17.9%	\$144,000	\$18,000 - \$300,000	1,361	\$105.80
Home Built 1970-1990	65	23.3%	\$160,000	\$20,000 - \$400,000	1,488	\$107.53
Home Built 1990-2010	112	40.1%	\$220,000	\$79,999 - \$625,000	1,576	\$139.64
Home Built After 2010	44	15.8%	\$246,873	\$27,500 - \$638,000	1,944	\$126.99
Total	279	100.0%	\$175,000	\$18,000 - \$638,000	1,552	\$122.76

Source: RealQuest, Urban Partners

Figure 40: Highest Priced Home Sale in the Town of Batavia (2019-2023)



2,823 SF single-family home sold for \$638,000 in December 2023

Figure 41: Median Priced Home Sale in the Town of Batavia (2019-2023)



1,390 SF single-family home sold for \$175,000 in March 2023

Submarket Analysis - East Submarket

In the East Submarket, across ten jurisdictions, there were a total of 1,161 sales transactions during the 5-year study period, constituting 35.7% of the county's total transactions. The median sale price for a single-family home in the East Submarket was \$154,950, equivalent to \$97.36 per SF. Rural homesteads, comprising 3.4% of transactions, had a median sale price of \$180,000 (\$95.69 per SF), while duplexes/triplexes had a median sale price of \$122,200 (\$55.08 per SF). Additionally, 46 mobile/manufactured homes were sold at a median price of \$65,000, or \$62.62 per SF (see Table 71).

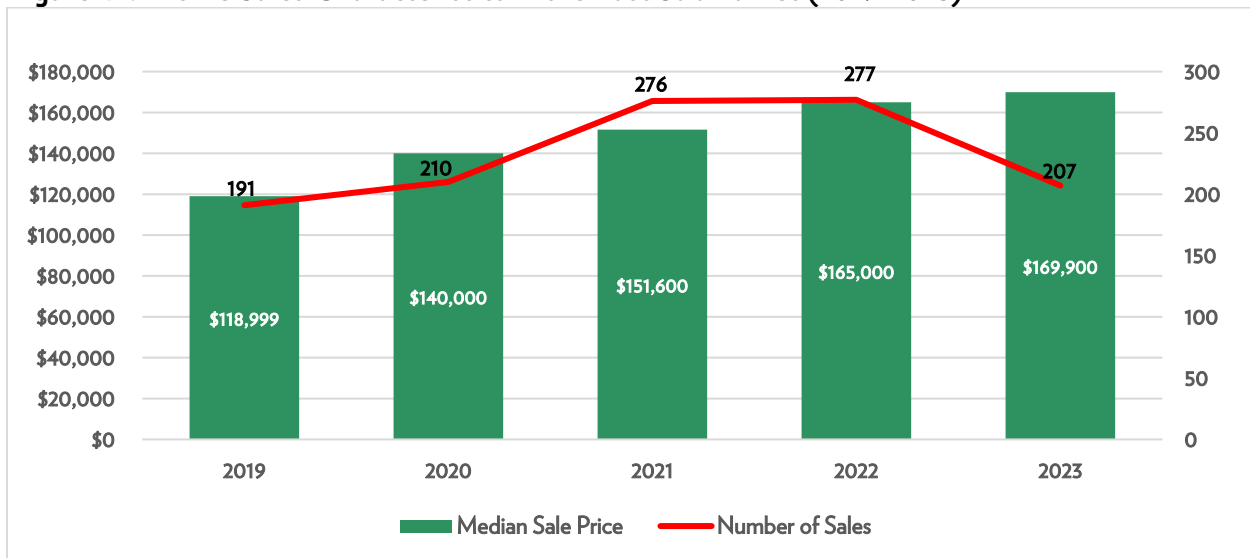
Table 71: Breakdown of Home Sales in the East Submarket (2019-2023)

	No. of Transactions	% of Transactions	Median Sale Price	Median Size (SF)	Median Price Per SF
Single-Family Detached	1,006	86.6%	\$154,950	1,592	\$97.36
Duplex/Triplex	70	6.0%	\$122,200	2,219	\$55.08
Rural Homestead	39	3.4%	\$180,000	1,881	\$95.69
Mobile/Manufactured Homes	46	4.0%	\$65,000	1,038	\$62.62
Townhouse	-	-	-	-	-
Total	1,161	100.0%	\$150,000	607	\$93.34

Source: RealQuest, Urban Partners

The East Submarket has witnessed consistent growth in home prices since 2019, when the median price stood at \$118,999, equivalent to \$76.67 per SF. By 2023, the median price had increased to \$169,900 (or \$111.26 per SF) indicating an annualized growth rate of 9.3%. Although sales volume peaked at 277 transactions in 2022, it declined to 207 sales in 2023. Despite this decrease, the 207 transactions recorded in 2023 remained higher than the pre-pandemic volume of 191 sales in 2019 (see Figure 38).

Figure 42: Home Sales Characteristics in the East Submarket (2019-2023)



Source: RealQuest, Urban Partners

Table 72 shows the number of transactions by jurisdiction within the East Submarket. The Village of Le Roy reported the most sales transactions with 246, followed by the Town of Le Roy with 160, the Town of Stafford with 146, and the Town of Byron with 118.

Table 72: Home Sales in the East Submarket by Jurisdictions (2019-2023)

	2019	2020	2021	2022	2023	Total 2019-23
Bergen Town	18	19	20	21	17	95
Bethany Town	11	19	24	22	19	95
Byron Town	22	22	29	26	19	118
Elba Town	14	12	19	23	14	82
Le Roy Town	32	25	26	42	35	160
Pavilion Town	16	19	28	25	21	109
Stafford Town	27	30	28	35	26	146
Bergen Village	12	10	14	23	12	71
Elba Village	7	10	7	10	5	39
Le Roy Village	32	44	81	50	39	246
Total	191	210	276	277	207	1,161

Source: RealQuest, Urban Partners

Table 73 summarizes the median sale prices for the East Submarket by municipal jurisdictions. From 2019 to 2023, the median sale price in the East Submarket increased by 42.8% or 9.3% annually. In 2023, the highest median sale price of \$210,000 was reported in the Town of Le Roy, followed by the Village of Elba at \$180,000.

Table 73: Median Sale Price in the East Submarket by Jurisdictions (2019-2023)

	2019	2020	2021	2022	2023	% Increase 2019-23
Bergen Town	\$138,900	\$170,000	\$182,150	\$185,000	\$106,000	-23.7%
Bethany Town	\$150,000	\$125,000	\$145,000	\$189,950	\$171,000	14.0%
Byron Town	\$96,164	\$101,750	\$150,000	\$154,500	\$145,000	50.8%
Elba Town	\$129,550	\$132,000	\$140,000	\$145,000	\$170,578	31.7%
Le Roy Town	\$125,000	\$184,500	\$223,500	\$179,950	\$210,000	68.0%
Pavilion Town	\$132,500	\$163,000	\$182,450	\$167,200	\$174,999	32.1%
Stafford Town	\$130,000	\$147,950	\$178,400	\$193,600	\$129,950	0.0%
Bergen Village	\$137,500	\$140,500	\$166,400	\$159,900	\$164,950	20.0%
Elba Village	\$72,000	\$157,750	\$150,000	\$178,150	\$180,000	150.0%
Le Roy Village	\$83,000	\$127,500	\$135,000	\$145,000	\$177,500	113.9%
Total	\$118,999	\$140,000	\$151,600	\$165,000	\$169,900	42.8%

Source: RealQuest, Urban Partners

Table 74 summarizes the single-family sales in the East Submarket by the year homes were built. Nearly two-thirds (64.1%) of the single-family homes sold in the East Submarket were built prior to 1990 (1,645 transactions), and the highest median sale price of \$217,500 was reported for single-family homes built after 2010.

Table 74: Single Family Sales in the East Submarket by Jurisdictions (2019-2023)

	No. of Transactions	% of Transactions	Median Sale Price	Price Range	Median Square Footage	Median Price Per SF
Home Built Before 1940	138	13.7%	\$96,500	\$10,000 - \$425,000	1,710	\$56.45
Home Built 1940-1970	242	24.1%	\$134,250	\$12,000 - \$340,000	1,556	\$86.28
Home Built 1970-1990	265	26.3%	\$150,000	\$22,500 - \$425,000	1,488	\$100.81
Home Built 1990-2010	317	31.5%	\$185,000	\$10,000 - \$750,000	1,590	\$116.35
Home Built After 2010	44	4.4%	\$217,500	\$12,750 - \$650,000	1,836	\$118.50
Total	1,006	100.0%	\$154,950	\$10,000 - \$750,000	1,592	\$97.36

Source: RealQuest, Urban Partners

Figure 43: Highest Priced Home Sale in the East Submarket (2019-2023)



4,013 SF single-family home in the Town of Stafford sold for \$750,000 in October 2022

Figure 44: Median Priced Home Sale in the East Submarket (2019-2023)



1,698 SF single-family home in the Village of Le Roy sold for \$155,000 in January 2021

Submarket Analysis - West Submarket

In the West Submarket, across nine jurisdictions, there were a total of 707 sales transactions during the 5-year study period, constituting 21.8% of the county's total transactions. The median sale price for a single-family home in the West Submarket was \$160,000, equivalent to \$107.82 per SF. Rural homesteads, comprising 8.9% of transactions, had a median sale price of \$245,000 (\$128.07 per SF), while duplexes/triplexes had a median sale price of \$127,750 (\$59.72 per SF). Additionally, nine (9) mobile/manufactured homes were sold at a median price of \$127,200, or \$101.92 per SF (see Table 75).

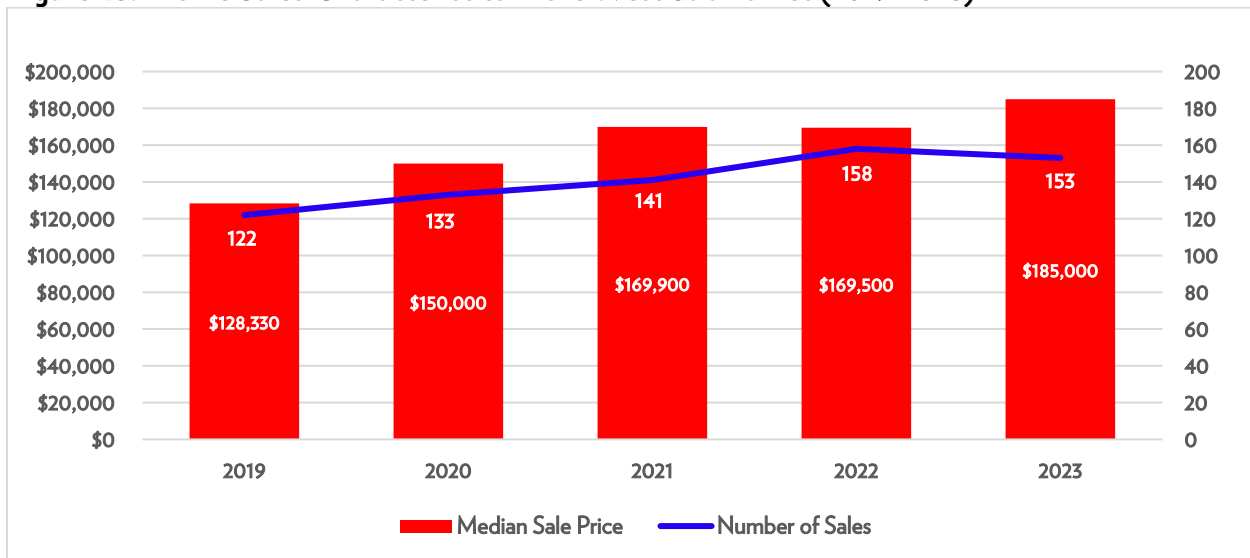
Table 75: Breakdown of Home Sales in the West Submarket (2019-2023)

	No. of Transactions	% of Transactions	Median Sale Price	Median Size (SF)	Median Price Per SF
Single-Family Detached	576	81.5%	\$160,000	1,484	\$107.82
Duplex/Triplex	42	5.9%	\$127,750	2,139	\$59.72
Rural Homestead	63	8.9%	\$245,000	1,913	\$128.07
Mobile/Manufactured Homes	9	1.3%	\$127,200	1,248	\$101.92
Townhouse	-	-	-	-	-
Total	707	100.0%	\$160,000	1,536	\$104.17

Source: RealQuest, Urban Partners

The West Submarket has witnessed consistent growth in home prices since 2019, when the median price stood at \$128,330, equivalent to \$82.47 per SF. By 2023, the median price had increased to \$185,000, or \$124.83 per SF, indicating an annualized growth rate of 9.6%. Sales volume peaked at 158 transactions in 2022, before declining slightly in 2023 to 153. Despite this decrease, the 153 transactions recorded in 2023 remained 25.4% higher than the pre-pandemic volume of 122 sales in 2019 (see Figure 40).

Figure 45: Home Sales Characteristics in the West Submarket (2019-2023)



Source: RealQuest, Urban Partners

Table 76 shows the number of transactions by jurisdiction within the West Submarket. The Town of Pembroke reported the most sales transactions with 178, followed by the Town of Darien with 136, and the Town of Alexander with 97.

Table 76: Home Sales in the West Submarket by Jurisdictions (2019-2023)

	2019	2020	2021	2022	2023	Total 2019-23
Alabama Town	24	17	11	21	19	92
Alexander Town	17	18	19	25	18	97
Attica Town	-	1	1	-	-	2
Darien Town	24	22	26	31	33	136
Oakfield Town	11	8	12	13	17	61
Pembroke Town	25	36	45	36	36	178
Village Alexander	-	1	3	7	8	19
Village Corfu	6	6	9	5	5	31
Village Oakfield	15	24	15	20	17	91
Total	122	133	141	158	153	707

Source: RealQuest, Urban Partners

Table 77 summarizes the median sale prices for the West Submarket by municipal jurisdictions. From 2019 to 2023, the median sale price in the West Submarket increased by 44.2 or 9.6% annually. In 2023, the highest median sale price of \$240,000 was reported in the Town of Pembroke, followed by the Town of Darien at \$220,000.

Table 77: Median Sale Price in the West Submarket by Jurisdictions (2019-2023)

	2019	2020	2021	2022	2023	% Increase 2019-23
Alabama Town	\$118,000	\$149,500	\$172,000	\$170,000	\$144,500	22.5%
Alexander Town	\$130,000	\$140,000	\$155,000	\$171,000	\$157,500	21.2%
Attica Town	-	\$185,000	\$133,300	-	-	-
Darien Town	\$190,000	\$184,500	\$200,838	\$184,000	\$220,000	15.8%
Oakfield Town	\$125,000	\$80,000	\$156,000	\$229,000	\$199,900	59.9%
Pembroke Town	\$155,000	\$177,500	\$191,000	\$213,500	\$240,000	54.8%
Village Alexander	-	\$100,000	\$132,500	\$135,000	\$202,820	-
Village Corfu	\$142,900	\$147,750	\$195,000	\$180,000	\$185,000	29.5%
Village Oakfield	\$106,900	\$113,200	\$147,000	\$116,000	\$127,000	18.8%
Total	\$128,330	\$150,000	\$169,900	\$169,500	\$185,000	44.2%

Source: RealQuest, Urban Partners

Table 78 summarizes the single-family sales in the West Submarket by the year homes were built. Approximately half (47.9%) of the single-family homes sold in the West Submarket were built prior to 1970 (276 transactions), and the highest median sale price of \$235,000 was reported for single-family homes built between 1990 and 2010.

Table 78: Single Family Sales in the West Submarket by Jurisdictions (2019-2023)

	No. of Transactions	% of Transactions	Median Sale Price	Price Range	Median Square Footage	Median Price Per SF
Home Built Before 1940	87	15.1%	\$113,400	\$13,000 - \$292,700	1,474	\$76.93
Home Built 1940-1970	189	32.8%	\$147,400	\$12,000 - \$370,000	1,445	\$102.01
Home Built 1970-1990	168	29.2%	\$175,000	\$46,000 - \$370,000	1,418	\$123.41
Home Built 1990-2010	106	18.4%	\$235,000	\$25,000 - \$490,000	1,635	\$143.77
Home Built After 2010	26	4.5%	\$225,000	\$19,000 - \$675,000	1,731	\$130.02
Total	576	100.0%	\$160,000	\$12,000 - \$675,000	1,484	\$107.82

Source: RealQuest, Urban Partners

Figure 46: Highest Priced Home Sale in the West Submarket (2019-2023)



1,778 SF single-family home in the Town of Darien sold for \$675,000 in August 2023

Figure 47: Median Priced Home Sale in the West Submarket (2019-2023)



1,374 SF single-family home in the Town of Alabama sold for \$160,000 in November 2023

Non-Owner-Occupant Buyer Activity

Though a majority of home sales in Genesee County involve owner-occupant buyers, there were 845 homes that were sold to non-owner-occupants in the five-year study period (representing 26.0% of the total number of transactions). As summarized in Table 79, the median sale price for these investor purchases were \$99,900, or \$63.63 per SF. These prices were 36.5% lower than homes purchased by owner-occupants.

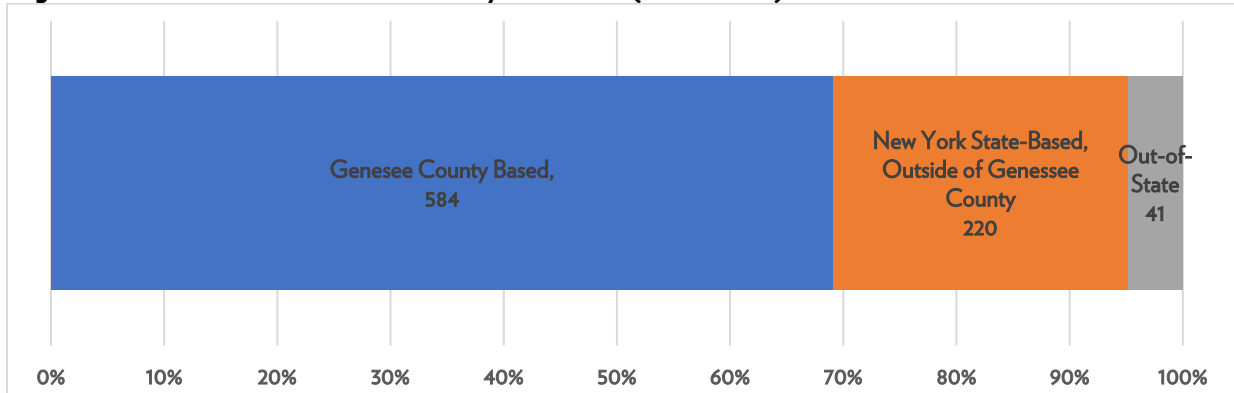
Table 79: Home Sales by Buyer Type (2019-2023)

	No. of Transactions	Median Sales Price	Price Range	Median Square Footage	Median Price Per SF
Investors	845	\$99,900	\$10,000 - \$466,000	1,570	\$63.63
Owner-Occupants	2,405	\$155,000	\$10,000 - \$750,000	1,548	\$100.13
Total	3,250	\$143,050	\$10,000 - \$750,000	1,554	\$92.08

Source: RealQuest, Urban Partners

In Figure 42, the distribution of non-owner-occupant investor purchases based on their location is presented. Investors within Genesee County totaled 584 transactions, constituting 69.1% of all investor purchases. Meanwhile, those within New York State but outside of Genesee County accounted for 220 transactions, comprising 26.0% of the total. Out-of-state investors acquired 41 units during the study period, representing 4.9% of all investor purchases.

Figure 48: Distribution of Investors by Location (2019-2023)



Source: RealQuest, Urban Partners

Key Takeaways of Sales Housing Market

Active Market: Over the five-year study period (2019-2023), Genesee County recorded 3,250 home sales, indicating a very active homeownership market.

Peak Sales: The highest sales volume occurred in 2022 with 783 transactions, followed by a slight decline in 2023 with 626 sales, which was still 5.9% higher than 2019.

Median Sale Price: The median sale price during this period was \$143,050, or \$92.08 per square foot (SF).

Dominant Property Type: Single-family detached homes made up 83.5% of the transactions, with a median sale price of \$150,000, or \$100.13 per SF.

Duplex/Triplex Sales: Duplexes and triplexes accounted for 10.1% of the sales, with a median price of \$100,000, or \$49.24 per SF.

Rural Homesteads: These properties, representing 3.8% of transactions, had a median sale price of \$220,000, or \$116.96 per SF, with an average lot size of 19.7 acres.

Price Growth: Home prices in Genesee County increased at an annualized rate of 8.3%, with the median price rising from \$115,000 in 2019 to \$158,000 in 2023.

Home Age Impact: Homes built after 2010 had the highest median sale price of \$230,000, reflecting a trend where newer homes command higher prices.

Investor Activity: Non-owner-occupants purchased 26.0% of the homes, with a median price of \$99,900, significantly lower than the median for owner-occupied homes.

Sales by Builder: Production home builders, such as Ryan Homes and Wallco Construction, sold only 19 homes in the study period, with a median price of \$237,060.

Mobile/Manufactured Homes: These made up 2.3% of the sales, with a median sale price of \$53,500, or \$54.59 per SF.

Submarket Sales: The East Submarket had the most sales (1,161 transactions), followed by Batavia City (1,062 sales), the West Submarket (707 sales), and Batavia Town (320 sales).

Highest Submarket Prices: The Town of Batavia reported the highest median sale price of \$179,500, while the City of Batavia had the lowest at \$120,000.

Sales Volume Fluctuations: The sales volume in the City of Batavia peaked in 2021 with 258 transactions, then decreased in subsequent years.

City of Batavia Submarket Trends: The City of Batavia saw a significant number of transactions (1,062), with single-family homes selling at a median price of \$126,249. Home prices grew steadily, with a median price increase from \$93,008 in 2019 to \$130,000 in 2023.

Batavia Town Submarket Trends: In the Town of Batavia, homes built after 2010 had a median price of \$246,873, showing higher values for newer properties.

East Submarket Trends: This submarket saw consistent price growth, with the median sale price increasing by 42.8% from 2019 to 2023, led by significant growth in jurisdictions like Le Roy. It is also the largest submarket by sales, with 1,161 transactions.

West Submarket Trends: Although smaller in volume, the West Submarket saw the highest price growth rate (44.2%), with a median price of \$160,000 in 2023. The Town of Pembroke reported the highest median sale price at \$240,000.

9. Rental Housing Market Analysis

To understand the market-rate rental housing market in Genesee County, Urban Partners examined overall county-wide rental trends and conducted a detailed analysis of the rental characteristics in each of the housing Submarkets: Batavia City, Batavia Town, East, and West.

County-Wide Rental Market Trends

According to the 2022 ACS, there were a total of 6,497 renter-occupied homes in Genesee County, which represents a 2.4% increase from 2012. The Batavia City Submarket had the only gain of renter-occupied units, increasing by 614, or 21.6%. The Batavia Town Submarket witnessed the greatest decline in rental units, losing 314 or 49.5%. Both the East and West Submarkets lost relatively modest amounts of renter-occupied units (see Table 80).

Table 80: Total Number of Renter Occupied Homes Units, 2012-2022

	Total Renter Occupied 2012	Total Renter Occupied 2022	Total Change (2012-2022)	% Change (2012-2022)
Genesee County	6,346	6,497	151	2.4%
Batavia City Submarket	2,842	3,456	614	21.6%
Batavia Town Submarket	640	323	-314	-49.5%
East Submarket	1,627	1,507	-120	-7.4%
West Submarket	1,237	1,211	-26	-2.1%

Source: U.S. Census Bureau, Urban Partners

Just 22.7% of Genesee County renter households live in single detached structures. However, a total of 69.9% of renters live in a structure with no more than four units. The most common rental structure is a duplex, constituting 27.3% of the rental stock (see Table 81).

Table 81: Units in Structure, Rental Homes, 2022

	Genesee County		Bat. City		Bat. Town		East		West	
	Count	%	Count	%	Count	%	Count	%	Count	%
All Rental Units	6,497	-	3,456	-	323	-	1,507	-	1,211	-
1, detached	1,247	19.2%	386	11.2%	84	26.0%	472	31.3%	305	25.2%
1, attached	227	3.5%	103	3.0%	42	13.0%	41	2.7%	41	3.4%
2	1,774	27.3%	1,289	37.3%	69	21.4%	173	11.5%	243	20.1%
3 or 4	1,296	19.9%	600	17.4%	70	21.7%	259	17.2%	367	30.3%
5 to 9	841	12.9%	363	10.5%	39	12.1%	391	25.9%	48	4.0%
10 to 19	184	2.8%	111	3.2%	0	0.0%	73	4.8%	0	0.0%
20 to 49	265	4.1%	172	5.0%	0	0.0%	27	1.8%	66	5.5%
50 or more	437	6.7%	432	12.5%	0	0.0%	1	0.1%	4	0.3%
Mobile home	226	3.5%	0	0.0%	19	5.9%	70	4.6%	137	11.3%
Boat, RV, van, etc.	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%

Source: U.S. Census Bureau

The Batavia City Submarket heavily influences the duplex popularity in the county, as it makes up 37.3% of the city’s rental housing stock. Almost all of the county’s larger multi-family units are located in the city as well. The most common rental structure in the Batavia Town Submarket is the single detached dwelling (26.0% of its rental housing stock). This is also the case in the East Submarket, where 31.1% of the rental housing is single detached. Structures with five to nine units account for another quarter of rental units there. In the West Submarket, structures with three or four units comprise 30.3% of the rental stock, with single detached another quarter. The West has the greatest number of mobile homes, occupying 11.3% of its rental housing.

Within Genesee County, 4,495 (or 69.2%) of all rental households pay less than \$1,000 per month in rent, with 45.3% paying between \$700 and \$999. Just 7.2% pay more than \$2,000 per month. A total of 1,534 renter households (23.6%) pay between \$1,000 to \$1,999 per month, while 322 don’t pay any cash rent—equivalent to 5.0% of all renter households in the county (see Table 82) ¹¹.

Table 82: Gross Monthly Rent, 2022

	Genesee County		Bat. City		Bat. Town		East		West	
		%		%		%		%		%
Less than \$100	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
\$100 to \$299	284	4.4%	181	5.2%	0	0.0%	63	4.2%	40	3.3%
\$300 to \$499	344	5.3%	231	6.7%	0	0.0%	74	4.9%	39	3.2%
\$500 to \$699	921	14.2%	412	11.9%	25	7.7%	260	17.3%	224	18.5%
\$700 to \$999	2946	45.3%	1,550	44.8%	69	21.4%	656	43.5%	671	55.4%
\$1,000 to \$1,499	1388	21.4%	744	21.5%	164	50.8%	362	24.0%	118	9.7%
\$1,500 to \$1,999	146	2.2%	78	2.3%	53	16.4%	7	0.5%	8	0.7%
\$2,000 to \$2,499	79	1.2%	69	2.0%	0	0.0%	8	0.5%	2	0.2%
\$2,500 to \$2,999	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
\$3,000 to \$3,499	52	0.8%	52	1.5%	0	0.0%	0	0.0%	0	0.0%
\$3,500 or more	15	0.2%	11	0.3%	0	0.0%	0	0.0%	4	0.3%
No cash rent	322	5.0%	128	3.7%	12	3.7%	77	5.1%	105	8.7%

Source: U.S. Census Bureau

The Batavia Town Submarket reports a greater percentage of renter households paying higher rents, with 70.9% of its households paying \$1,000 or more per month, compared to 31.3% in the Batavia City Submarket, 30.1% in the East Submarket, and 19.6% in the West Submarket. The Batavia City Submarket has the most number (412) and percentage (11.5%) of renters paying less than \$500 per month among county Submarkets. At the same time, the City and West Submarkets are the only ones with renters who pay \$3,500 or more per month.

¹¹ ACS estimates of gross monthly rent include utility and fuel costs.

Submarket Analysis - Batavia City Submarket

The Batavia City Submarket has seven market-rate multi-family apartment complexes. Figure 43 details the complexes in terms of key unit/community amenities, total units, and the age of the community to demonstrate the variety that exists in the Submarket.

Figure 49: Market-Rate Rental Housing Complexes in the Batavia City Submarket

	<p>Birchwood Village Apartments and Townhomes 88 Dewey Ave., City of Batavia</p> <p>Total Units: 224 Built: 1971 Type: 2-Story Low-Rise/Townhome</p> <p>Key Unit Amenities:</p> <ul style="list-style-type: none"> • Large kitchens • Walk-in closets • Patio/balcony <p>Key Community Amenities:</p> <ul style="list-style-type: none"> • Washer/dryer hookup • Playground • Pet-friendly
	<p>Woodstock Gardens 219 Spruce St., City of Batavia</p> <p>Total Units: 128 Built: 1972 Type: 2-Story Low-Rise</p> <p>Key Unit Amenities:</p> <ul style="list-style-type: none"> • Updated kitchen • Walk-in closets • Carpet • Porch/balcony/patio <p>Key Community Amenities:</p> <ul style="list-style-type: none"> • Clubhouse • Pet play area • Playground • Grill and picnic area • Extra storage



Walden Estates Townhomes

337 Bank St., City of Batavia

Total Units: 80

Built: N/A

Type: 2-Story Townhouse

Key Unit Amenities:

- Large kitchens
- Walk-in closets
- Vinyl flooring/carpet
- Patio/balcony

Key Community Amenities:

- Washer/dryer hookup
- Pet-friendly



North Spruce Apartments

214 N. Spruce St., City of Batavia

Total Units: 75

Built: 1969

Type: 2-Story Low-Rise

Key Unit Amenities:

- Updated kitchens
- Carpet
- Large closets
- Patio/balcony

Key Community Amenities:

- Community room
- Laundry facilities



Park Site Manor Apartments

54 E. Main St., City of Batavia

Total Units: 58

Built: N/A

Type: 3-Story Mid-Rise

Key Unit Amenities:

- Updated kitchens
- Carpet
- Large closets
- Patio/balcony

Key Community Amenities:

- Washer/dryer hookup
- Pet-friendly



Batavia Gardens Apartments

679 E. Main St., City of Batavia

Total Units: 44
Built: N/A
Type: 2-Story Low-Rise

Key Unit Amenities:

- Updated kitchens
- Hardwood floors
- Large closets

Key Community Amenities:

- Laundry Facilities
- Outdoor grills and picnic area
- Pet-friendly



City View Residences

45 Ellicott St., City of Batavia

Total Units: 10
Built: 2023
Type: 2-Story Low-Rise

Key Unit Amenities:

- High-end kitchens
- Hardwood floors
- Large closets
- In-unit washer/dryer
- Balconies

Key Community Amenities:

- Downtown location
- View
- Pet-friendly

Source: Apartments.com, Apartmentfinder.com, Apartmentguide.com, individual complexes, Urban Partners

In Table 83, various characteristics are summarized for the market-rate apartment complexes found in the Batavia City Submarket, including size, rental rate, and occupancy information.

Table 83: Market-Rate Rental Characteristics for Multi-Family Complexes in City Submarket

Name	Address	Jurisdiction	Total Units	Type	Price	Size (SF)	\$/SF	Availability (5/24)
Birchwood Village Apartments and Townhomes	88 Dewey Ave.	Batavia City	224	1 Bedroom	\$750	550 SF	\$1.36	0
				2 Bedroom	\$850-\$1,000	816 SF	\$1.04 to \$1.23	0
				3 Bedroom	\$1,427	1,080 SF	\$1.32	0
				4 Bedroom	\$1,627	1,243 SF	\$1.31	0
Woodstock Gardens	219 N. Spruce St.	Batavia City	128	1 Bedroom	\$1,030	770 SF	\$1.34	1
				2 Bedroom	\$1,130	1,007 SF	\$1.22	1
Walden Estates Townhomes	337 Bank St.	Batavia City	80	1 Bedroom	\$1,100	858 SF	\$1.28	0
				2 Bedroom	\$1,200-\$1,300	910-1,194 SF	\$1.09 to \$1.32	0
				3 Bedroom	\$1,300	1,246 SF	\$1.04	0
North Spruce Apartments	214 N. Spruce St.	Batavia City	75	1 Bedroom	\$930	756 SF	\$1.23	1
				2 Bedroom	\$1,030	995 SF	\$1.04	0

Park Site Manor Apartments	541 E. Main St.	Batavia City	58	Studio	\$776-\$945	300 SF	\$3.15	1
				2 Bedroom	\$995-\$1,024	765 SF	\$1.30 to \$1.34	0
Batavia Gardens Apartments	679 E. Main St.	Batavia City	44	1 Bedroom	\$650	620 SF	\$1.05	0
				2 Bedroom	\$860	837 SF	\$1.03	1
City View Residences	45 Ellicott St.	Batavia City	10	1 Bedroom	\$1,325	876-1,184 SF	\$1.12 to \$1.51	0
				2 Bedroom	\$1,575	994-1,138 SF	\$1.38 to \$1.58	0

Source: Apartments.com, Apartmentfinder.com, Rent.com, Rentable.co, individual complexes, Urban Partners

Age of Complexes

As shown in Figure 44 above, the multi-family rental complexes in the Batavia City Submarket were built mainly in the 1960s and '70s. However, a new generation of apartments is getting built in downtown Batavia. While some are in planning and construction, City View Residences opened in 2023.

Number of Units

The multi-family rental communities in the Batavia City Submarket have a wide range in sizes—from just 10 units to 224. The largest complex in the Submarket is Birchwood Village Apartments and Townhomes. The next largest development—Woodstock Gardens—is significantly smaller with 128 units. City View Residences is the smallest development in the Submarket.

Rents

Rents per square foot at the multi-family apartment complexes in the Batavia City Submarket examined in Table 83 range from \$1.03 to \$2.75/SF, depending on the unit size. The upper end of the rent scale can be found at City View Residences, the Submarket's newest development. This small complex offers one- and two-bedroom apartments. Rents for one-bedroom units are \$1,325 per month (up to \$1.51 per SF) and for two-bedroom units, \$1,575 per month (up to \$1.58 per SF).

The lowest rents (and rents/SF) among multi-family complexes in the Batavia City Submarket are at Batavia Gardens Apartments. At this complex, asking rents are \$650 per month for a 620 SF one-bedroom unit (\$1.05/SF) and \$860 per month for a 837 SF two-bedroom unit (\$1.03/SF).

Availability

As with all of Genesee County, the Batavia City Submarket appears to have limited availability of multi-family rental housing. At the time of this research (May 2024), a total of just 5 units were available to rent out of 619 total units in the seven Submarket multi-family rental communities, representing an overall vacancy rate of just 0.8%¹². A healthy rental

¹² Includes units available for immediate occupancy or available through May 2024. Additional units are available beyond this date in some apartment complexes.

market has a vacancy rate of around 4%. Three of the seven communities reported no vacancies at all. In terms of unit types available in the Submarket, there was 1 studio unit, 2 one-bedroom units, and 2 two-bedroom units.

Individual Apartment Units

Within the Batavia City Submarket, there are currently several individual apartment units available for rent. This is a more common form of rental unit in Genesee County than multi-family rental complexes (see Table 84).

Table 84: Summary of Individual Homes Available for Rent in the Batavia City Submarket


Address	Jurisdiction	Type	Rent	SF	Rent/SF	BR	BA
13 Wood St.	Batavia City	Detached House	\$1,700	1,600	\$1.06	4	2.0
54 Kingsbury Ave.	Batavia City	Detached House	\$1,600	1,144	\$1.40	3	1.0
12 Burke Dr., #B	Batavia City	Townhouse	\$1,575	1,200	\$1.31	3	1.5
22 Ellicott Ave., #4	Batavia City	Apartment	\$1,400	1,100	\$1.27	2	1.0
33 Manhattan Lower Ave.	Batavia City	Apartment	\$1,400	1,081	\$1.30	2	1.0
25 Cherry St.	Batavia City	Detached House	\$1,300	2,178	\$0.60	2	1.0
7 Chestnut St.	Batavia City	Apartment	\$1,300	1,000	\$1.30	3	1.0
37 Walnut St. #B	Batavia City	Apartment	\$965	800	\$1.21	1	1.0
28 Columbia Ave., #4	Batavia City	Apartment	\$900	560	\$1.61	1	1.0
665 Ellicott St. Apt. 1	Batavia City	Apartment	\$725	475	\$1.53	0	1.0
218 State St.	Batavia City	Apartment	\$600	500	\$1.20	0	1.0

Source: Apartments.com, Craigslist.com, Zillow.com

Figure 44 details characteristics of a sample of the available units listed above.

Figure 50: Select Individual Units for Rent in the Batavia City Submarket

<p>Address: 13 Wood St., City of Batavia Type of Unit: Detached House; 4 BR, 2 BA Rent: \$1,700 Size: 1,600 SF Rent/SF: \$1.06 Description: Newly renovated 4 bedroom, 2 full bath home. Detached 2.5 car garage, eat in kitchen, living room, dining room with new windows, doors, furnace, insulation, floors etc. A large yard and a park nearby.</p>	
<p>Address: 12 Burke Dr., #B, City of Batavia Type of Unit: Townhouse/Twin; 3 BR, 1.5 BA Rent: \$1,575 Size: 1,200 SF Rent/SF: \$1.31 Description: Completely remodeled 2 story duplex, all new flooring and kitchen with brand new cabinets, stainless steel appliances. All new recess lighting. Includes a full basement with laundry facilities. Has a private drive with large backyard in a safe neighborhood.</p>	

<p>Address: 25 Cherry Street, City of Batavia Type of Unit: Detached House; 2 BR, 1 BA Rent: \$1,300 Size: 2,178 SF Rent/SF: \$0.60 Description: Great opportunity. This is a true side by side dwelling. A whole house living complete with basement, 1st floor nonshared laundry. This offers its own driveway right at the unit's entrance. Spacious rooms, nice yard.</p>	
<p>Address: 37 Walnut St., #B, City of Batavia Type of Unit: Apartment; 1 BR, 1 BA Rent: \$965 Size: 800 SF Rent/SF: \$1.21 Description: Clean, cozy and quiet lower apartment, freshly painted. Creek water view with country like setting with lots of wildlife behind the house and is also close to bike/running path & downtown amenities. Living room with new carpet, enclosed porch and more.</p>	
<p>Address: 28 Columbia Ave., #4, City of Batavia Type of Unit: Apartment; 2 BR, 1 BA Rent: \$900 Size: 560 SF Rent/SF: \$1.61 Description: Very nice one bedroom with open space living room and kitchen. Freshly painted with a lot of windows for natural lights. Wall to wall easy to clean vinyl flooring. Laundry connection ready to buy your own washer and dryer if needed. There is parking at front driveway.</p>	


Source: Apartments.com, Craigslist.com, Zillow.com

Individual rental units available in the Batavia City Submarket as of May 2024 range from studio apartments in subdivided dwellings to entire four-bedroom houses. The highest rent commanded among available units in the Batavia City Submarket is \$1,700 per month for a 1,600 SF four-bedroom home (\$1.06/SF) on Wood Street. The lowest rent is \$600 for a 500 SF studio apartment on State Street (\$1.20/SF). The largest home available is 2,178 SF for \$1,300 on Cherry Street. At \$0.60 per SF, this is the lowest price on a square-footage basis among available units for rent in the Batavia City Submarket.

Submarket Analysis - Batavia Town Submarket

The Batavia Town Submarket has just one significant market-rate multi-family apartment complex – West Main Gardens. Figure 45 provides details of the complex.

Figure 51: Rental Housing Complex in the Batavia Town Submarket

	<p>West Main Gardens 4112 W. Main St., Town of Batavia</p> <p>Total Units: N/A</p> <p>Unit Types:</p> <ul style="list-style-type: none">• 1 BR: 675 SF – unavailable• 2 BR: 800 SF – unavailable <p>Rent:</p> <ul style="list-style-type: none">• 1 BR: \$595 (\$.088/SF) <p>Key Amenities:</p> <ul style="list-style-type: none">• In-unit washer/dryer• Porch/balcony• Eat-in kitchen
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Source: Apartments.com, Apartmentfinder.com, individual complexes, Urban Partners

West Main Gardens, located in the Town of Batavia, is a renovated multi-family complex with 675 SF one-bedroom units and 880 SF two-bedroom units. Rents are listed as starting at \$595 per month for the one-bedroom unit (\$.088/SF). At the time of this research (May 2024), there were no units available. There were also no individual apartment units for rent in the Submarket.

Submarket Analysis - East Submarket

The East Submarket has two market-rate multi-family apartment complexes, both in the Village of Le Roy. Figure 46 details the complexes in terms of key unit/community amenities, total units, and the age of the community to demonstrate the variety that exists in the Submarket.

Figure 52: Market-Rate Rental Housing Complexes in the East Submarket

	<p>Creekside Manor Apartments 61 Myrtle St., Village of Le Roy</p> <p>Total Units: 40 Built: 1967 Type: 2-Story Low-Rise</p> <p>Key Unit Amenities:</p> <ul style="list-style-type: none"> • Eat-in kitchens • Walk-in closets • Carpet <p>Key Community Amenities:</p> <ul style="list-style-type: none"> • Laundry facilities • Extra storage • Pet-friendly
	<p>Royal Apartments 103 W. Main St., Village of Le Roy</p> <p>Total Units: 136 Built: N/A Type: 2-Story Low-Rise</p> <p>Key Unit Amenities:</p> <ul style="list-style-type: none"> • Updated kitchen • Walk-in closets • Carpet <p>Key Community Amenities:</p> <ul style="list-style-type: none"> • Clubhouse • Pet play area • Laundry facility • Extra storage

Source: Apartments.com, Apartmentfinder.com, Apartmentguide.com, individual complexes, Urban Partners

In Table 85, various characteristics are summarized for the market-rate apartment complexes found in the East Submarket, including size, rental rate, and occupancy information.

Table 85: Market-Rate Rental Characteristics for Multi-Family Complexes in East Submarket

Name	Address	Jurisdiction	Total Units	Type	Price	Size (SF)	\$/SF	Availability (5/24)
Royal Apartments	103 W. Main St.	Le Roy Village	136	1 Bedroom	\$699-\$799	500-684 SF	\$1.02 to \$1.17	0
				2 Bedroom	\$922-\$933	925-1,000 SF	\$0.92 to \$0.93	0
				3 Bedroom	\$1,042-\$1,072	1,215 SF	\$0.86 to \$0.88	0
Creekside Manor Apartments	61 Myrtle St.	Le Roy Village	40	1 Bedroom	\$730	550 SF	\$1.33	0
				2 Bedroom	\$830	650 SF	\$1.28	2

Source: Apartments.com, Apartmentfinder.com, Rent.com, Rentable.co, individual complexes, Urban Partners

The two multi-family rental complexes in the East Submarket were built in the 1960s. The apartment communities range in size from 40 units to 136 units, with the largest complex being Royal Apartments.

Rents per square foot at the multi-family apartment complexes in the East City Submarket examined in Table 85 range from \$.086 to \$1.33/SF, depending on the unit size, with Royal having the larger apartments. Both complexes have similar monthly rents. The highest is a three-bedroom unit for \$1,072 per month (\$.88/SF), while the lowest rent is a one-bedroom unit for \$699 per month (\$1.02/SF), both at Royal Apartments.

The availability of multi-family rental housing in the East Submarket is limited. At the time of this research (May 2024), a total of just 2 units (both two-bedroom) were available to rent out of 176 total units in the multi-family rental communities, representing an overall vacancy rate of just 1.1%.

Individual Apartment Units

Within the East Submarket, there are currently several individual apartment units available for rent, all as apartments in subdivided dwellings (see Table 86).

Table 86: Summary of Individual Units Available for Rent in the East Submarket

Address	Jurisdiction	Type	Rent	SF	Rent/SF	BR	BA
1 N. Main St.	Elba Village	Apartment	\$1,300	1,000	\$1.30	2	1.0
5828 East Rd., Unit B8	Bethany Town	Apartment	\$1,100	850	\$1.29	2	1.0
36-38 E. Main St., #1	Le Roy Village	Apartment	\$1,050	875	\$1.20	2	1.0
6194 Main Rd., #2	Stafford Town	Apartment	\$1,050	900	\$1.17	2	1.0
27 E. Main St., #2	Le Roy Village	Apartment	\$950	700	\$1.36	2	1.0
8191 E. Main Rd., Apt. 4	Le Roy Town	Apartment	\$810	575	\$1.41	1	1.0
6194 Main Rd., #3	Stafford Town	Apartment	\$800	700	\$1.14	0	1.0

Source: Apartments.com, Craigslist.com, Zillow.com

Figure 47 details characteristics of a sample of the available units listed above.

Figure 53: Select Individual Units for Rent in the East Submarket

<p>Address: 1 N. Main St., Elba Village Type of Unit: Apartment; 2 BR, 1 BA Rent: \$1,300 Size: 1,000 SF Rent/SF: \$1.30 Description: Brand new and completely remodeled upstairs apartment. New kitchen, bathroom, windows, lighting, and doors. New flooring and paint throughout. All appliances (including washer/dryer) included.</p>	
<p>Address: 27 E. Main St., Le Roy Village Type of Unit: Apartment; 2 BR, 1 BA Rent: \$1,100 Size: 850 SF Rent/SF: \$1.29 Description: Newly renovated first floor unit with deck in excellent location. Located next door to the historic Jello Factory Museum and Leroy House and across the street from Leroy School. Off street parking.</p>	
<p>Address: 5828 East Rd., Unit B8 Type of Unit: Apartment; 2 BR, 2 BA Rent: \$1,300 Size: 2,178 SF Rent/SF: \$0.60 Description: Recently remodeled apartment in quiet apartment community.</p>	

Source: Apartments.com, Craigslist.com, Zillow.com

Individual rental units available in the East Submarket as of May 2024 range from studio to two-bedroom apartments, though all but two of the seven are two-bedroom units. The highest rent commanded among available units in the East Submarket is \$1,300 per month for a 1,000 SF two-bedroom apartment (\$1.30/SF) in Elba Village. The lowest rent is \$800 for a 700 SF studio apartment in the Town of Stafford (\$1.14/SF).

Submarket Analysis - West Submarket

The West Submarket has just one market-rate multi-family apartment complex—Brickhouse Commons—though there are proposals to build more phases of that project as well as additional apartments in the same vicinity in the Town of Pembroke. Figure 48 provides details of the complex.

Figure 54: Rental Housing Complex in the West Submarket

	<p>Brickhouse Commons 8705 Brickhouse Corners Dr., Pembroke Town</p> <p>Total Units: 6 (Future buildout of 30) Unit Types:</p> <ul style="list-style-type: none">• 1 BR: 910 SF – unavailable• 2 BR: 1,257 SF – unavailable <p>Rent:</p> <ul style="list-style-type: none">• N/A <p>Key Amenities:</p> <ul style="list-style-type: none">• In-unit washer/dryer• Porch/balcony• Walk-in closets
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Source: Apartments.com, Apartmentfinder.com, individual complexes, Urban Partners

Brickhouse Commons is a new mixed-use complex—the first of its type in the town—with 910 SF one-bedroom units and 1,257 SF two-bedroom units. At the time of this research (May 2024), rents were not listed and there were no units available. The units are above ground-floor commercial space.

Individual Apartment Units

Within the West Submarket, there was just one individual apartment unit available for rent (see Figure 49).

Figure 55: Individual Unit for Rent in the West Submarket

<p>Address: Undisclosed, Village of Alexander Type of Unit: Apartment; 1 BR, 1 BA Rent: \$1,200 Size: 625 SF Rent/SF: \$1.92 Description: Newly renovated apartment in the village of Alexander. New flooring, kitchen cabinets, bathroom sink and freshly painted.</p>	
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Source: Apartments.com, Craigslist.com, Zillow.com

The sole advertised individual unit available for rent in the West Submarket as of May 2024 is a newly renovated one-bedroom 625 SF unit for \$1,200 per month (\$1.92/SF).

Key Takeaways of Rental Housing Market

Genesee County Renter Trends: In 2022, Genesee County had 6,497 renter-occupied homes, a 2.4% increase from 2012. The Batavia City Submarket was the only area with an increase in rental units, growing by 614 units (21.6%). The Batavia Town Submarket saw the greatest decline, losing 314 units (49.5%).

Rental Structures in Genesee County: Only 22.7% of renters in Genesee County live in single detached structures, while 69.9% live in buildings with no more than four units. Duplexes are the most common rental type, making up 27.3% of the rental stock. Most of the larger multi-family units in the county are also located in Batavia City.

Rental Structures by Submarket: Single detached dwellings are most common in the Batavia Town and East Submarkets, while the West Submarket has a higher concentration of mobile homes (11.3%). The Batavia City Submarket has a significant number of duplexes, which make up 37.3% of its rental housing.

Rent Costs in Genesee County: The majority (69.2%) of renters in Genesee County pay less than \$1,000 per month, with 45.3% paying between \$700 and \$999. Only 7.2% of renters pay more than \$2,000 per month.

Rents by Submarket: A greater percentage of renters in the Batavia Town Submarket (70.9%) pay \$1,000 or more per month, compared to lower percentages in other Submarkets. The Batavia City Submarket has the highest number of low-cost rentals (below \$500 per month).

Batavia City Multi-Family Complexes: The Batavia City Submarket has seven market-rate multi-family apartment complexes, with Birchwood Village being the largest (224 units) and City View Residences the smallest (10 units).

Rent Ranges in Batavia City: Rents per square foot in Batavia City's multi-family complexes range from \$1.03 to \$2.75, with City View Residences, the newest development, at the higher end. Batavia Gardens Apartments has the lowest rents.

Limited Availability in Batavia City: The Batavia City Submarket has the lowest vacancy rate of 0.8%, with only 5 units available out of 619 across the seven multi-family complexes as of May 2024.

Individual Rentals in Batavia City: Several individual apartment units are available for rent in Batavia City, ranging from studio apartments to four-bedroom houses. The highest rent is \$1,700 per month for a 1,600 SF house, and the lowest is \$600 for a 500 SF studio apartment.

Batavia Town Rental Market: The Batavia Town Submarket has just one market-rate multi-family complex, West Main Gardens, with no units available at the time of research. Rents there start at \$595 per month for a one-bedroom unit.

East Submarket Rental Complexes: The East Submarket has two multi-family complexes, Creekside Manor Apartments and Royal Apartments, with limited availability. Rents range from \$0.86 to \$1.33 per square foot.

Individual Rentals in East Submarket: Several individual apartments are available for rent in the East Submarket, with rents ranging from \$800 to \$1,300 per month, depending on unit size.

West Submarket Complex: The West Submarket has one market-rate multi-family complex, Brickhouse Commons, with no current availability. Plans for additional units are in progress.

Individual Rentals in West Submarket: The only individual unit available in the West Submarket as of May 2024 is a 625 SF one-bedroom apartment for \$1,200 per month.

10. Future Housing Needs

The future housing needs for Genesee County through 2040 depend on two key trends: economic development, particularly employment, and population forecasts. Employment has fluctuated over the past 20 years, as described in Section 5, with the most recently available number of jobs in the county amounting to just over 23,000 in 2023. Future economic development is anticipated to have a significant measurable impact on the county’s housing needs. This growth, combined with evolving household trends in Genesee County, *will require approximately 7,100 new housing units (increasing the housing stock by at least 27%) by 2040*, as detailed in the analysis below.

STAMP Impact on Housing Forecasts

The largest economic development project in Genesee County—the Science & Technology Advanced Manufacturing Park (STAMP)—is slated to bring thousands of jobs to the county over the next 20 years, with additional indirect spin-off employment expected to occur as well. STAMP is a green manufacturing mega-site developed to deliver hydropower, utilities, and talent from a strategic location in the county. STAMP is owned and developed by the Genesee County Economic Development Center. STAMP’s 1,250-acre campus sources high capacities of low-cost renewable power from Niagara Falls. STAMP includes:

- Electricity sourced from Niagara Falls Hydropower and 1-GW of solar energy generation in development within 20 miles
- Quad-redundant 345-kV transmission system connecting to the on-site 600-MW substation; and on-site 115-kV distribution system
- 1 MGD water completed with scalable, ready-to-bid water network
- 6 MGD force main with scalable, ready-to-bid wastewater treatment plant
- Natural gas system with 24” transmission line adjacent to site with distribution line

Initial development at the STAMP site includes Edwards Genesee and Plug Power. Edwards Genesee is onshoring critical semiconductor dry pump manufacturing with construction of a 240,000 square-foot facility that will serve American semiconductor chip manufacturers, generating significant carbon reduction in the industry’s supply chain. Plug Power is accelerating the production of clean green hydrogen with construction of a 30-acre campus dedicated to using clean water and green hydrogen to help the world meet net zero energy goals. The two firms anticipate a total of 700 employees at these two operations with 400 on-site by 2025. Total buildout of STAMP’s 1,250 acres would result in approximately 7,000 jobs.

Impact on Genesee County Housing Demand

The impact of STAMP on housing demand in Genesee County will be in addition to the housing needs based on future county population projections, identified in the analysis below.

This increment of housing demand will occur over a long period of time and will be complex. Key factors influencing this impact include:

1. The pace of development of the STAMP site
2. The housing location choices made by STAMP employees
3. The economic spillover in locally-supporting goods and services (retail & wholesale trade, health care, dining, construction, financial & personal services, local government) from these new STAMP site-based employees
4. The housing location choices made by employees in these “economic spillover” industries

Pace of Demand

After consultation with the Genesee County Economic Development Center, we estimate the pace of STAMP job growth as shown on Table 87. These forecasts show growth to 4,900 STAMP jobs by 2040. We note, however, that based on other high-tech district experience, growth is likely to be more uneven than what is shown on Table 1.

Table 87: Assumed STAMP Employment Growth Through 2040

Year	Estimated STAMP On-Site Employment
2025	400
2030	1,900
2035	3,400
2040	4,900

Source: Genesee County Economic Development Center, Urban Partners

Employee Housing Choice

As previously reported, 47.7% of workers employed in Genesee County also reside in the county. Examined from the viewpoint of STAMP-based jobs, this means that by 2040, 2,300 of STAMP’s 4,900 employees will likely choose housing in Genesee County (see Table 88).

Table 88: STAMP-Generated Housing Demand Through 2040

	2025	2030	2035	2040
STAMP Employment	400	1,900	3,400	4,900
Share of STAMP Jobs Held By Genesee Residents	47.7%	47.7%	47.7%	47.7%
Genesee County Resident STAMP Employees	191	906	1,622	2,337
Economic Spillover/Local Support Jobs	401	1,903	3,406	4,908
Total New Genesee County Resident Workers	591	2,810	5,028	7,246
Total STAMP-Created Households	466	2,214	3,962	5,710
New Housing Units Required	497	2,360	4,224	6,087

Source: Genesee County Economic Development Center, U.S. Census, Urban Partners

These new residents will create significant demand for locally-provided goods and services. We estimate there are 2.1 jobs in local-supporting industries (retail, construction, health care, etc.) for each job in sectors such as manufacturing and R&D. These local support jobs

constitute the “economic spillover” from the STAMP site and, by 2040, will generate another 4,900 jobs in Genesee County. Similarly, STAMP workers residing in nearby counties will generate large numbers of local support jobs in those locales.

Employees filing these “spillover” jobs will make housing choices spread throughout the region: many Genesee workers will live elsewhere, but likewise many workers filing these jobs in adjacent counties will live in Genesee County. For this housing demand analysis, we assume the cross-county commuting of workers in local support industries will balance. So, as shown on Table 2, the total new Genesee County workers residing in Genesee as a result of the STAMP site can be expected to grow from 2,800 in 2030 to nearly 7,250 by 2040.

In Genesee County, the ratio of households to employment in 2021 was .788; that is, each 1,000 workers created 788 households. Applying that ratio to the number of new resident workers created by STAMP, we see more than 2,200 additional households in Genesee County in 2030 growing to more than 5,700 additional households by 2040. *Assuming 6.2% housing vacancy, the demand for new Genesee County housing units as a result of the STAMP site will be nearly 2,400 in 2030 growing to 6,100 additional units in 2040.*

Planned Economic Growth Impacts on Housing Forecasts

In addition to STAMP, there are several local businesses currently experiencing as well as expecting employment growth that could potentially impact the need for additional housing in Genesee County. Companies with recently completed or soon-to-be completed facilities include Liberty Pumps, Rochester Regional Health, and Nexgistics. Companies with recently planned or approved facilities include HP Hood, OXBO International, and Horizon Acres Associates. This employment could total approximately 740 new jobs (see Table 89).

Table 89: Assumed Planned Employment Growth Through 2040

Business	Jobs	Note	Status
Liberty Pumps	30	\$13.7M expansion in Town of Bergen (completed in April 2023)	Recently completed or soon to completed
Rochester Regional Health	70	\$42M healthcare facility in Batavia (completed late 2023)	
Nexgistics	24	\$17.6M new build in Town of Pembroke (completed 2024)	
YMCA Healthy Living Campus	14	\$22.4M new build in Batavia (completing in late 2024)	
HP Hood	48	\$120M expansion in Town of Batavia	Recently planned or approved
Graham Corporation	24	\$17.6M expansion in City of Batavia	
OXBO International	120	\$46.6M new facility (60 new jobs with 60 more over next 5-6 years)	
MedTech Landing, LLC	2	Housing development	
9 Lent Avenue, LLC	4	\$3.8M expansion in Village of LeRoy (4 jobs)	
Horizon Acres Associates, Inc.	400	\$142M phased project w/six new commercial/industrial facilities in Town of Pembroke (400 jobs in full buildout)	
LNK Holdings, Inc.	4	Facility expansion in Town of Bergen	
Total	740		

Source: Genesee County Economic Development Center, Genesee County Department of Planning

Impact on Genesee County Housing Demand

As with STAMP, the impact of the growth of these companies on housing demand in Genesee County will be in addition to the housing needs based on future county population projections, identified below.

Pace of Demand

We estimate the pace of planned job growth in addition to STAMP as shown on Table 90. These forecasts conservatively assume growth of 740 jobs by 2040 based on current estimates of the planned/new development described above.

Table 90: Assumed Planned Employment Growth Through 2040

Year	Estimated Employment from Planned Economic Growth
2025	120
2030	250
2035	500
2040	740

Source: Genesee County Economic Development Center, Genesee County Department of Planning, Urban Partners

Employee Housing Choice

As previously reported, 47.7% of workers employed in Genesee County also reside in the county. For these new jobs, applying the same ration, by 2040, 353 of the 740 employees will likely choose housing in Genesee County (see Table 91).

Table 91: Planned Employment Growth-Generated Housing Demand Through 2040

	2025	2030	2035	2040
Employment	120	250	500	740
Share of Jobs Held By Genesee Residents	47.7%	47.7%	47.7%	47.7%
Genesee County Resident Employees	57	119	239	353
Economic Spillover/Local Support Jobs	120	250	501	741
Total New Genesee County Resident Workers	177	370	739	1,094
Total Planned Employment-Created Households	140	291	583	862
New Housing Units Required	149	311	621	919

Source: Genesee County Economic Development Center, U.S. Census, Urban Partners

As with STAMP, these new residents will create significant demand for locally-provided goods and services. We estimate there are 2.1 jobs in local-supporting industries (retail, construction, health care, etc.) for each job in sectors such as manufacturing and R&D whose location is determined by factors other than meeting the needs of nearby residents. These local support jobs constitute the “economic spillover” from the new employment and, by 2040, will generate another 741 jobs in Genesee County. Similarly, workers residing in nearby counties will generate large numbers of local support jobs in those locales.

Employees filing these “spillover” jobs will make housing choices spread throughout the region: many Genesee workers will live elsewhere, but likewise many workers filing these jobs in adjacent counties will live in Genesee County. For this housing demand analysis, we assume the cross-county commuting of workers in local support industries will balance. So, as shown on Table 91, the total new Genesee County workers residing in Genesee as a result of the new employment can be expected to grow from 370 in 2030 to nearly 1,100 by 2040.

In Genesee County, the ratio of households to employment in 2021 was .788; that is, each 1,000 workers created 788 households. Using the same ratio of households to employment in 2021 that was applied to STAMP (.788) for new resident workers, we see almost 300 additional households in Genesee County in 2030 growing to more than 860 additional households by 2040. *Assuming 6.2% housing vacancy, the demand for new Genesee County housing units as a result of the planned economic growth will be more than 300 in 2030 growing to more than 900 additional units in 2040.*

County Population Growth Assumptions and Housing Demand

The Cornell Program on Applied Demographics (PAD) publishes the results of a set of county population projections for the State of New York, most recently in 2018. They are produced using a cohort component model with an assumption that components of future demographic change will remain similar to recent demographic change. These projections account for estimated births, deaths, in-migration, and out-migration.

According to projections produced by PAD, Genesee County’s population is expected to decrease by 6.2% from 2020 to 2040 (see Table 92). The county’s total population in 2040 is projected at 54,896 residents, about 3,630 less than the 2020 population. (Note that the Cornell Program’s projections estimated 2020 population. We have adjusted those 2020 figures to the U.S. Census Bureau’s reported actual population, which was 1.5% greater. We have maintained Cornell’s allocations to age groups and have also grown Cornell’s population forecasts by 1.5% after 2020.)

Table 92: Genesee County Population Growth Forecasts, 2020-2040

	2020	2025	2030	2035	2040	Change (2020-40)	% Change (2020-40)
Genesee County Population	58,524	57,724	56,845	55,829	54,896	(3,628)	-6.20%
Persons ages 0-14 years	9,929	9,923	9,849	9,503	9,174	(755)	-7.60%
Persons ages 15-34 years	13,763	12,827	11,936	11,666	11,609	(2,154)	-15.65%
Persons ages 35-64 years	22,988	21,419	20,607	20,073	20,000	(2,988)	-13.00%
Persons ages 65+ years	11,844	13,555	14,452	14,588	14,112	2,268	19.15%
Genesee County Households	24,538	24,196	23,820	23,386	22,987	(1,550)	-6.32%
Group Quarters Population	1,106	1,106	1,106	1,106	1,106	-	
Population in Households	57,418	56,618	55,739	54,723	53,790	(3,628)	
Average Household Size	2.34	2.34	2.34	2.34	2.34		

Source: Cornell Program on Applied Demographics, U.S. Census Bureau, Urban Partners

This population change is heavily skewed toward persons over the age of 65 with that group expected to grow by 19% in the 2020 to 2040 period. Other age groups are projected to decrease: children under 15 by 8%; the cohort of younger adults by 16%; and the group of persons ages 35 to 64 will decline by 13%.

This overall population change should similarly reduce the number of households by about 6.32 from 2020 to 2040.

About 1,100 Genesee County residents live in group quarters such as college dorms, correctional institutions, and nursing home and assisted living facilities. We assume this group quarters population will remain constant through the forecast period.

The remaining population resides in households with an average household size of 2.34 persons. For this first broad-brush analysis, we assume this average household size will remain constant through the forecast period. Assuming that ratio continues, the projected number of Genesee County households in 2030 is 23,820; in 2040, the number of households is 22,987 (see Table 93).

Table 93: New Housing Unit Requirements - Genesee County 2020-2040

	2020	2025	2030	2035	2040
Household Population	57,418	56,618	55,739	54,723	53,790
Households	24,538	24,196	23,820	23,386	22,987
Population Per Household	2.34	2.34	2.34	2.34	2.34
Housing Units	26,170				
Year-Round Vacancy Rate	6.2%	6.2%	6.2%	6.2%	6.2%
Year-Round Housing Units Required		25,805	25,405	24,942	24,516
Units Demolished		200	220	265	310
Net New Housing Units Needed By 2025		(165)			
Net New Housing Units Needed 2025 to 2030			(181)		
Net New Housing Units Needed 2030 to 2035				(198)	
Net New Housing Units Needed 2035 to 2040					(115)

Source: Cornell Program on Applied Demographics, U.S. Census Bureau, Urban Partners

The 2020 census identified 26,170 housing units in Genesee County. Reported housing vacancy in 2020 was 6.2% of overall supply. We assume vacancy will remain steady at this 6.2% rate through 2040. Based on these aggregate assumptions, housing units required in Genesee County will decline from 26,170 in 2020 to 25,850 in 2025 and eventually 24,516 by 2040.

Housing supply will also be impacted by the demolition of older, deteriorated units. 2012 data shows approximately 40% of the housing stock being more than 70 years old. During the 2012 to 2022 period, 3.31% of this very old housing was demolished or otherwise left the housing stock. For this analysis we assume this pattern will continue through the forecast period, with

a growing number of demolitions each five-year period from 200 in the 2020-2025 period up to 310 in the 2035 to 2040 timeframe. This will provide a partial adjustment for the decline in housing demand. Nonetheless, under those aggregate assumptions, the Genesee County market will see a gradual increase in housing vacancy throughout the forecast period—a total of 660 additional vacant units by 2040 after adjusting for demolitions. There will be little or no impetus for new housing construction based on forecasts.

However, this aggregate analysis does not account for the impact on housing requirements caused by the substantial aging of Genesee County’s population during this 2020 to 2040 period. Population aging will likely require both additional housing units and different types of housing. Below, we assess in more detail both the impact of an aging population on overall housing demand and the need for housing types appropriate for an aging population.

Components of Housing Demand

Urban Partners analyzed the 2020 U.S. Census data to understand the demand for housing by age of householder and tenure. As shown on Table 94, the ratio of population in households to “householders” (head of household) varies by age group from .294 householders per capita for those ages 15 to 34 to .625 householders per capita for those ages 65 and older. Depending on the age of the householder, there is also significant variation in tenure, with 54.2% of 15 to 34-year-old households renting, while 81.1% of households over age 65 are homeowners.

Table 94: Genesee County Housing Demand by Age of Householder

	2020 Population	Householders Per Capita	2020 Households	Owner Share	Renter Share
Persons 15 to 34 Years	13,763	0.294			
Persons 35 to 64 Years	22,988	0.570			
Persons 65+ Years	11,844	0.625			
Householders 15 to 34 Years			4,042	45.8%	54.2%
Householders 35 to 64 Years			13,098	77.5%	22.5%
Householders 65+ Years			7,398	81.1%	18.9%

Source: U.S. Census Bureau, Urban Partners

On Table 95, we apply these factors to the household population growth data on Table 94 to identify the likely composition of households in Genesee County through the forecast period by age of householder and tenure. Note that total loss of households is estimated at 918 for the twenty-year period—significantly less than the loss of 1,550 households anticipated in the aggregate analysis in Table 92 above. All this adjustment is in senior households; the number of households headed by persons under age 65 is expected to shrink by more than 2,300, while senior households will grow by more than 1,400.

Table 95: Genesee County Housing Demand by Tenure & Age of Householder (2020-2040)

	2020	2025	2030	2035	2040	Change (2020- 2040)
Households						
Householder Age 15 to 34	4,042	3,767	3,505	3,426	3,409	(633)
Householder Age 35 to 64	13,098	12,204	11,741	11,437	11,396	(1,702)
Householder Age 65 & Older	7,398	8,467	9,027	9,112	8,815	1,417
Total	24,538	24,438	24,274	23,975	23,620	(918)
Owner-Occupied Housing						
Householder Age 15 to 34	1,851	1,725	1,605	1,569	1,562	(290)
Householder Age 35 to 64	10,151	9,458	9,100	8,864	8,832	(1,319)
Householder Age 65 & Older	6,000	6,867	7,321	7,390	7,149	1,149
Total	18,002	18,050	18,026	17,823	17,542	(460)
Rental Housing						
Householder Age 15 to 34	2,191	2,042	1,900	1,857	1,848	(343)
Householder Age 35 to 64	2,947	2,746	2,642	2,573	2,564	(383)
Householder Age 65 & Older	1,398	1,600	1,706	1,722	1,666	268
Total	6,536	6,388	6,248	6,152	6,078	(458)

Source: Cornell Program on Applied Demographics, U.S. Census Bureau, Urban Partners

We should also note that 95% of this growth in senior households occurs by 2030 and it peaks in 2035; after 2035, the number of senior households begins to decrease modestly. Similarly, 85% of the loss of households headed by persons under 65 occurs by 2030.

On Table 96, we disaggregate this information to identify the increments of household demand likely to appear in Genesee County during the 2020 to 2040 period and the expected adjustments to supply to accommodate this demand.

The most significant growth in demand will be for senior homeownership with more than 1,400 additional senior homeownership homes needed by 2030. We expect this demand will be met by construction of a modest number of new senior homes (more than 150) through 2030. However, we note that not all this senior demand will need to be met by new construction. Most adjustment in supply will occur naturally as middle-age households age to senior status but remain in their own homes. However, there will be increasing pressure through the 2020-2030 decade for lower-maintenance housing adapted to senior living.

Table 96: Incremental Housing Need by Tenure & Age of Householder

	2020-2025	2025-2030	2030-2035	2035-2040	Total
Owner-Occupied Housing					
Householder Age 15 to 34	(126)	(120)	(36)	(8)	(290)
Householder Age 35 to 64	(693)	(359)	(236)	(32)	(1,319)
Householder Age 65 & Older	867	454	69	(241)	1,149
Total Growth In Owner-Occupancy	48	(24)	(203)	(281)	(460)
Rental Housing					
Householder Age 15 to 34	(149)	(142)	(43)	(9)	(343)
Householder Age 35 to 64	(201)	(104)	(68)	(9)	(383)
Householder Age 65 & Older	202	106	16	(56)	268
Total Growth In Renter-Occupancy	(148)	(140)	(95)	(75)	(458)
Total Demand Growth	(100)	(164)	(299)	(356)	(918)
Loss Of Supply	(200)	(220)	(265)	(310)	(995)
New Supply Needed	100	56	(34)	(46)	77
Senior Homeownership	100	56			156
Other Homeownership					-
Senior Rental					-
Other Rental					-

Source: Cornell Program on Applied Demographics, U.S. Census Bureau, Urban Partners

Similarly, on the rental side, growth in demand by senior households will largely be met by existing rental units shifting to senior renters from younger households. We also assume that loss of housing stock (demolition) will come disproportionately from the current rental stock. Expected demolitions through the forecast period should balance loss of household demand and maintain current vacancy levels.

Total new housing stock needed during the forecast period is 156 senior homeownership units.

Total Housing Requirements Including Impact of STAMP and Other New Employment

Finally, on Table 97, we aggregate this information to identify the increments of household demand likely to appear in Genesee County during the 2020 to 2040 period—assuming on-going buildout of the STAMP and other employment sites—and the expected adjustments to supply to accommodate this demand. With increased housing demand from new employees, more of the current housing stock can be occupied by these new households and a larger amount of senior-oriented housing can be constructed providing more appropriate housing options for the growing group of seniors.

Table 97: Total Housing Demand Through 2040 Including Planned Economic Growth Impacts

	2020-2025	2025-2030	2030-2035	2035-2040	Total
Owner-Occupied Housing					
Householder Age 15 to 64-Base	(819)	(479)	(272)	(40)	(1,610)
Senior Base	867	454	69	(241)	1,149
STAMP Impact	331	1,242	1,243	1,242	4,058
Planned Economic Growth Impact	99	171	171	171	613
Total Growth In Owner-Occupancy	478	1,389	1,211	1,132	4,210
Rental Housing					
Householder Age 15 to 64-Base	(350)	(246)	(111)	(18)	(725)
Senior Base	202	106	16	(56)	268
STAMP Impact	166	621	621	621	2,029
Planned Economic Growth Impact	50	86	86	86	306
Total Growth In Renter-Occupancy	68	567	612	633	1,878
Total Demand Growth	546	1,955	1,823	1,765	6,088
Loss Of Supply	(200)	(220)	(265)	(310)	(995)
New Supply Needed	746	2,175	2,088	2,075	7,083
Senior Homeownership	361	499	200	-	1,060
Other Homeownership	175	944	1,061	1,184	3,364
Senior Rental	125	113	-	-	238
Other Rental	85	619	827	890	2,421

Source: Genesee County Economic Development Center, U.S. Census, Urban Partners

Under these assumptions, a total of *more than 7,000 new housing units are required by 2040*, including 1,000 to replace units lost to demolition. This new housing includes *1,000 senior homeownership units and 200 senior rentals needed in the next decade. Younger households will require more than 3,300 new owner-occupied homes and 2,400 rental units* built at a pace generally paralleling the development of STAMP—assumed here to be reasonably even through 2040.

Key Takeaways of Future Housing Needs

STAMP Economic Impact: STAMP will bring around 4,900 jobs to Genesee County by 2040, with a large portion of workers, about 2,300, living in Genesee County—significantly increasing housing demand.

Indirect Job Creation: In addition to direct STAMP employment, another 4,900 indirect jobs will emerge from local services and industries, also with a portion living in Genesee County.

Local Business Growth: Other companies like Liberty Pumps, Rochester Regional Health, and Horizon Acres will contribute to housing demand with an additional 740 jobs by 2040 leading to 350 new Genesee County residents and another 740 indirect spillover jobs created.

Population and Household Trends: If not factoring in any anticipated economic growth, Genesee County's population is expected to decline by 6.2% and households by 6.3%, however, with a 19.2% increase in senior citizens and households.

Demolition Impact: 1,000 housing units are expected to be demolished, primarily older homes, affecting housing supply as well.

Workforce Housing Demand: more than 8,300 resident workers (including spillover from surrounding areas) will need housing in Genesee County.

Senior Housing Demand: A growing senior population will require 1,200 new housing units (1,000 owner-occupied, 200 rentals) by 2040 as well.

New Housing Units Needed: By 2040, Genesee County will require approximately 7,100 new housing units, including 1,200 units for seniors. This growth translates to a need for 355 new units per year (2020-2040), or a 27% increase in housing supply. The pace of needed housing development will correlate closely with STAMP's job growth, increasing steadily through 2040.

11. Recommendations, Strategies, & Action Steps

Addressing the housing challenges in Genesee County requires a collaborative and coordinated approach. No single municipality or submarket has the resources or capacity to resolve these issues alone. A collective effort involving the County, municipalities, non-profit organizations, and businesses is crucial for making measurable progress.

Developing effective housing solutions will require a comprehensive strategy that capitalizes on the unique strengths and expertise of each contributor. The County can offer overall guidance and resources to ensure alignment and efficiency. Partnering with municipalities allows for a localized approach that addresses the specific needs and dynamics of each submarket. Non-profit organizations bring valuable community insight as well as financial and on-the-ground support for housing initiatives. Businesses can also contribute financially, offer expertise in construction and real estate, and explore innovative public-private partnerships.

To support this collaborative effort, it is essential to establish a structured framework for communication and cooperation. Regular meetings, working groups, and a shared platform for data and information exchange will foster unity and a common purpose among all stakeholders. The challenges outlined in the report are manageable through a united approach and combined resources, ensuring that the county's housing needs can be effectively met across all communities.

The following housing recommendations, implementation strategies, and action steps are based on the quantitative analysis performed above, with input and guidance from Genesee County staff, municipal representatives, key stakeholders, and the public at-large. They represent the most significant themes for the County and its housing partners to pursue in the coming decade, with policies the County may consider in the effort to promote a healthy and balanced residential market in Genesee County.

Recommendation 1: Increase housing variety in the county to offer more attainable options.

Implementation Strategies	Key Action Steps	Involved Partners	Proposed Timeframe
<p>1.1. Secure community support for a diversified housing stock that includes more non-single-family detached homes and higher-density residential products.</p>	<p>A. Create a countywide Housing Working Group to provide a shared platform for data and information exchange to match housing needs with opportunities toward the goal of producing more homes.</p>	<p>Department of Planning, Builders/Developers, Genesee County Economic Development Center (GCEDC), Leadership of Large Employers, Housing Advocates</p>	<p>Short-Term</p>
	<p>B. Share the housing study broadly throughout the county. Emphasize housing needs data with developer stakeholders.</p>	<p>Department of Planning, GCEDC, Housing Working Group, Builders/Developers</p>	<p>Short-Term</p>
	<p>C. Provide evidence-based information to elected officials, municipal leaders, and planning/zoning boards about the fiscal and community benefits of denser residential development patterns. Provide housing-related assistance, particularly to those with outdated comprehensive plans.</p>	<p>Department of Planning, Municipal Representatives</p>	<p>Short-Term</p>
	<p>D. Support municipalities in joining the Pro-Housing Community Program to facilitate the development of more housing and receipt of discretionary funding (https://hcr.ny.gov/phc).</p>	<p>Department of Planning, Municipal Representatives, GCEDC</p>	<p>Short-Term</p>
	<p>E. Continue to encourage redevelopment and infill residential projects in the city and villages.</p>	<p>Department of Planning, Municipal Representatives, Housing Working Group</p>	<p>Short-Term</p>
	<p>F. Continue to encourage new residential development in Priority Development Area locations and away from productive agricultural land.</p>	<p>Department of Planning, Municipal Representatives, Housing Working Group</p>	<p>Short-Term</p>
<p>1.2 Reduce barriers to entry for first-time home buyers to build wealth through home ownership.</p>	<p>A. Develop or expand programs/incentives to assist potential homebuyers, particularly lower-income households, with down payment assistance, low-interest loans, grant funding, enhanced mortgage products, and other financial assistance. Example: SONYMA program (https://hcr.ny.gov/sonyma), Homebuyer Dream Program (https://www.fhlny.com/community/housing-programs/hdp/), USDA Rural Development Single Family Loan Program (https://cms1files.revize.com/geneseecountynew/docs/502_PreQual.pdf) and Monroe County’s First Time Home Buyer Program through Pathstone (https://www.thehousingcouncil.org/).</p>	<p>Department of Planning, GCEDC, Banks and Lending Institutions</p>	<p>Short-Term</p>

	B. Examine the feasibility of establishing employer assisted housing programs by leveraging public-private partnerships with large employers, healthcare providers, educational institutions, housing providers, and county agencies.	Department of Planning, GCEDC, Housing Working Group	Short-Term
1.3. Retain and create new income-restricted rental housing for low-income and vulnerable households.	A. Evaluate the feasibility of establishing a county housing trust fund that's tied to a permanent self-funding mechanism. Example: Tompkins County Community Development Fund (https://tompkinscountyny.gov/planning/housing-choices-housing-fund).	Department of Planning, GCEDC, Department of Social Services	Mid-Term
	B. Collaborate with the New York State Housing Finance Agency (HFA), municipal agencies, and private/non-profit housing development organizations to preserve existing income-restricted rental housing stock (i.e., devise a plan for projects with expiring compliance periods).	Department of Planning, Department of Social Services, Housing Working Group, Batavia Housing Authority	Short-Term
	C. Work with the HFA, municipal agencies, and private/non-profit housing development organizations to build additional income-restricted rental units targeted to low (below 80% of AMI) and very low-income residents (below 50% of AMI).	Department of Planning, Department of Social Services, Housing Working Group, Builders/Developers, Batavia Housing Authority	Mid-Term
	D. Coordinate with social service providers and housing development organizations to build and/or retain homes for low-to-moderate income residents with special needs (e.g., individuals experiencing homelessness including teens, domestic abuse victims, individuals with physical/mental disabilities, and veterans).	Department of Planning, Department of Social Services, Veterans Services Agency, Housing Working Group, Batavia Housing Authority	Long-Term
	E. Work with elected officials, municipal leaders, and non-profit housing partners to identify a fair and sensible distribution of income-restricted/affordable rental housing throughout the county.	Department of Planning, Department of Social Services, Housing Working Group	Short-Term
1.4. Expand the County's housing-supportive personnel.	A. Explore establishing a dedicated county housing staff position situated within the Department of Planning to coordinate the complete spectrum of housing development and supportive services across the county. This could include managing emergency housing services, homelessness support, weatherization programs, developer recruitment, and other related functions.	Genesee County Legislature, Department of Planning, Department of Social Services, Housing Working Group	Long-Term
	B. Create a countywide housing advisory board consisting of elected officials and/or representatives from each municipality to identify and address specific housing challenges, identify key housing initiatives, and pursue housing opportunities.	Department of Planning, Municipal Representatives, GCEDC	Short-Term
	C. Facilitate regular meetings and roundtable discussions with the staff person and advisory board.	Department of Planning, Municipal Representatives	Short-Term

Recommendation 2: Facilitate the expansion of new housing development in the county’s Priority Development Areas to both stimulate and prepare for growth associated with STAMP and other economic development.

Implementation Strategies	Key Action Steps	Involved Partners	Proposed Timeframe
2.1. Evaluate existing land use and housing policies to ensure that growth can be accommodated.	A. Assess zoning standards within the county’s Priority Development Areas deemed appropriate for higher-density housing to ensure developers can build by right. Create ability for municipalities to increase units through incentive zoning to allow clustered development.	Department of Planning, GCEDC, Housing Working Group, Municipal Representatives, Developers/Builders	Mid-Term
	B. Assist municipalities with updating comprehensive plans to align with the community’s housing goals and zoning.	Department of Planning, Municipal Representatives	Short-Term
	C. Explore the suitability of inclusionary initiatives for developers such as density bonuses, ADUs, and real estate tax abatements to encourage and incentivize more affordable development.	Department of Planning, GCEDC, Housing Working Group, Real Property Division, Municipal Representatives, Developers/Builders	Mid-Term
	D. Monitor infrastructure capacity to absorb desired residential growth. Continue engaging in countywide discussions regarding the need for additional infrastructure investments in suitable locations.	Department of Planning, Housing Working Group, Municipal Representatives	Short-Term
2.2. Streamline the County’s housing delivery services.	A. Coordinate with municipalities to identify grants for infrastructure improvements that will assist developers with financing new housing projects.	Department of Planning, GCEDC, Housing Working Group, Municipal Representatives, Developers/Builders	Short-Term
	B. Provide technical assistance to local jurisdictions to ensure that zoning provisions allow more varied housing typologies and higher densities.	Department of Planning, Housing Working Group, Municipal Representatives	Short-Term
2.3. Increase the supply of housing for future employees.	A. Incentivize developers and home builders to construct more market-rate for-sale housing, including smaller homes targeted to the “workforce” sector.	Department of Planning, GCEDC, Housing Working Group, Developers/Builders	Mid/Long-Term
	B. Promote the development of mixed-use and multi-family apartments, townhomes, and condominiums in Priority Development Areas with existing infrastructure near transportation and services.	Department of Planning, GCEDC, Housing Working Group, Municipal Representatives, Developers/Builders	Long-Term

Recommendation 3: Expand housing options for the growing senior population.

Implementation Strategies	Key Action Steps	Involved Partners	Proposed Timeframe
3.1. Assist older adults with staying independent in their current homes as long as possible.	A. Initiate a senior home modification program that offers grants, low-interest loans, and/or volunteer labor for a variety of items to help mobility-challenged seniors live safely in their current homes (such as ramps, stair lifts, bathroom grab bars, roll-in showers, and ground floor bedroom conversion). Example: Tompkins County Community Development Fund (https://tompkinscountyny.gov/planning/housing-choices-housing-fund).	Department of Planning, Office for the Aging	Short-Term
	B. Continue promoting the Genesee County Handyman Program to assist low-income seniors with small, household repairs.	Department of Planning, Office for the Aging	Short-Term
3.2. Increase the desirable supply of new, lower-maintenance housing in mixed-age, walkable, amenity-rich neighborhoods with design features that are suitable for senior living.	A. Offer technical assistance to municipalities to encourage/incentivize accessory dwelling units (ADUs) where appropriate as an affordable housing option for seniors.	Department of Planning, Office of the Aging, Housing Working Group, Municipal Representatives	Short-Term
	B. Coordinate with retirement home communities to build sufficient units/beds in various levels of care (independent living communities, assisted living facilities, and nursing homes) in the next twenty years.	Department of Planning, Office of the Aging, Housing Working Group, Developers/Builders	Long-Term
	C. Coordinate with affordable housing providers to build new low-income senior housing and retain the supply of such units. Prioritize areas serviced by public transit, social services, and medical facilities.	Department of Planning, Office of the Aging, Housing Working Group, Developers/Builders, Batavia Housing Authority	Long-Term

Recommendation 4: Stabilize and rehabilitate the county’s aging housing stock.

Implementation Strategies	Key Action Steps	Involved Partners	Proposed Timeframe
<p>4.1. Minimize the negative impacts of vacant and/or dilapidated housing units.</p>	<p>A. Maintain a real-time inventory of vacant or distressed homes along with key property information (such as ownership with mailing address, lien/judgment status, tax payment status, mortgage, etc.).</p>	<p>Department of Planning, Housing Working Group, Real Property Division, Municipal Representatives</p>	<p>Short-Term</p>
	<p>B. Evaluate the feasibility of instituting a vacant property registration program to monitor and ensure a minimum standard of maintenance and enforcement. Consult with private companies that offer property registration services on behalf of municipalities.</p>	<p>Department of Planning, Housing Working Group, Municipal Representatives</p>	<p>Mid-Term</p>
	<p>C. Evaluate the feasibility of establishing a county land bank (similar to Wayne and Seneca Counties) to address any problems of vacant, abandoned, derelict, contaminated, or tax delinquent property in a coordinated manner through the acquisition and disposition of real property and returning that property to productive use.</p>	<p>Department of Planning, Housing Working Group, Municipal Representatives</p>	<p>Mid-Term</p>
	<p>D. Encourage the repair and rehabilitation of vacant rental units and other vacant spaces to increase the supply of critically needed apartments for low- and moderate-income renters. Example: Vacant Rental Improvement Program (https://hcr.ny.gov/v-rip).</p>	<p>Department of Planning, Housing Working Group, Municipal Representatives</p>	<p>Short-Term</p>
<p>4.2. Support home renovation activities for older housing stock.</p>	<p>A. Partner with various service providers to launch a multi-faceted home improvement program in mature urban core city and village neighborhoods where focused intervention efforts will reverse disinvestment and stabilize the housing stock. Support basic systems repairs, weatherization, lead paint removal, and façade improvements, leveraging any existing programs. Example: USDA Rural Development Home Repair Loan/Grant Program (https://cms1files.revize.com/geneseecountynew/docs/504_PreQual.pdf).</p>	<p>Department of Planning, Municipal Representatives</p>	<p>Short-Term</p>
	<p>B. Incentivize the demolition and replacement of overly distressed homes by offering grants based on the appraised value of the newly built replacement home. Institute deed restrictions to keep replacement homes from being converted to short-term rental units.</p>	<p>Department of Planning, GCEDC, Municipal Representatives, Developers/Builders</p>	<p>Long-Term</p>
	<p>C. Provide incentives for owners of older apartments to replace lost rent during renovations to improve energy efficiency. Example: Property Assessed Clean Energy (https://www.energy.gov/scep/slsc/property-assessed-clean-energy-programs).</p>	<p>Department of Planning, GCEDC, Municipal Representatives, Developers/Builders</p>	<p>Long-Term</p>

Appendix 1: Existing Plans Review Summary

Several plans and documents have been prepared for Genesee County to guide its future growth. Many of those plans are related to housing, either directly or indirectly. The following is an inventory of the plans as well as a summary of any goals, strategies, and recommendations included therein that should be considered in this Housing Needs Assessment and Market Analysis.

Genesee County Housing Needs & Market Assessment (2018)

Key Findings: Demographic and Housing Characteristics

- **Single-Family, Owner-Occupied Units Dominate the Market:** As can be anticipated in a rural County, roughly three out of every four housing units in the County are single family, owner-occupied units. While this is a somewhat obvious finding, it is very relevant for housing policies in the County, associated programs to assist homeowners, and for developers to understand market preferences.
- **Very low-Income Households Predominately live in Multi-family Rental Units:** More than 50 percent of households that earn less than \$35,000 annually live in multi-family rental units. Some of the families live in multi-family complexes but many also live in older, multifamily units throughout the County. While many complexes have built in maintenance programs because of funding, multi-family rental units outside of complexes do not have similar funding assistance for maintenance.
- **Almost 50 percent of Renter Households have Housing Problems and Cannot Afford Market Rents:** 49 percent of renters are living in units that are not affordable. Some of the affordability issues are addressed with the more than 800 Housing Choice vouchers available in the County but that only addresses a fraction of the need. 46 percent of renters also have housing problems including incomplete kitchens or bathrooms and more than one person/bedroom.
- **More than 50% of the Housing Stock is 50 Years or Older:** Housing maintenance is therefore a major priority in the County.
- **Renters and Homeowners Both Have Housing Problems:** While a significant percentage of renters have housing problems, the *number* of owners that have housing problems (3,885) exceeds the *number* of renters that have housing problems (2,975).
- **The Return on Investment for both Owners and Rental Developers is Low.** Rental rates, in inflation adjusted dollars, have not changed in 15 years. Home values have slightly decreased. The lack of growth in values discourages upgrades and maintenance of homes as well as the attraction of new development. While there has been some development and proposals for new rental units in the County recently the majority of them have been for projects subsidized by grants or low-cost financing.
- **Population and Employment Levels are Stable:** Genesee County's population and employment levels have remained stable over the last 15 years. While stability is good for the County, increases in both would increase the demand for housing.

- **The Population is Getting Older:** The average age of residents in the County increased from 37.4 to 42.7 years of age from 2000 to 2015.
- **Household Sizes Continue to Shrink:** The average household size of owner occupied homes dropped from 2.74 to 2.54 from 2000 to 2015.

Key Findings: Market Analysis

- **An Oversupply of Owner-occupied Units Affordable to Very Low-Income Households.** There is an oversupply of owner-occupied units for homeowners that earn less than 50% of the HUD (U.S. Department Housing and Urban Development Department) Area Median Family Income (HAMFI). However it should be noted some of the supply is of low quality.
- **There is Demand for Owner-Occupied Units Affordable to Low Income and Above Moderate Income:** There are not enough owner-occupied homes for those households above 50 percent of the HAMFI with an especially significant shortage for those earning more than 80 percent of HAMFI.
- **Rental Housing Units are Needed for Extremely Low-Income Households:** Rental households earning 30% or less of the HAMFI do not have enough housing units available that are affordable to them. This is especially true for households with incomes below \$15,000. However, much of the need is addressed with Housing Choice rent vouchers.
- **There is an Excess Supply of Rental Units Affordable for Very Low to Moderate Income Households:** There are too many rental units in the County that cater to those earning between 31-80% of HAMFI.
- **There is Demand for Higher Priced Apartments:** For households earning more than \$50,000 there are not enough units in the market that they can afford.
- **More New Rental Units will be needed than Owner Units in the Future:** Because of changes in age, income, family sizes and consumer preferences there will be a greater need for rental units regardless of population scenarios.

Housing Demand through 2040

Low Growth Scenario – The low range estimates of future housing demand are based on Cornell Community and Regional Development Institute (CARDI) population projections utilized by the New York State Department of Labor. CARDI projects a decline in Genesee County’s population from 59,458 in 2015 to 54,153 in 2040.

Mid-Range Growth Scenario – The mid-range estimates of future housing demand are based on population projections prepared by the Genesee Finger Lakes Regional Planning Council (GFLRPC). GFLRPC projects a steady but minimal increase in Genesee County’s population from 59,458 in 2015 to 61,449 in 2040.

High End Growth Scenario – The high range estimates of future housing demand are based on population projections assuming STAMP will be at full buildout in 20 years with an

estimated 10,000 jobs. This is a conservative approach that estimates population will increase from 59,458 in 2015 to 69,182 in 2040 based on Genesee County benefitting from a third of the population growth created by STAMP.

Solutions and Recommendations

1. **Establish a single family, moderate income, owner occupied Countywide Housing Rehabilitation Program:** While some communities have applied independently for housing rehabilitation grant programs, and some agencies provide funding for extremely low income individuals, there is a significant demand for individuals to upgrade their homes as there is a limited supply of homes for those earning between 51-80% of HAMFI. The program should be county-wide to have the greatest impact and also realize efficiencies with administration.

2. **Establish a Rental Unit Rehabilitation Program County-Wide:** There are an estimated 2,975 renter units with housing problems. While a rental rehabilitation program is administratively difficult because it involves tracking incomes of renters who often move, it may be easier to start with larger landlords that have the capacity to help in obtaining income information or tie it in with other government programs where income is already available and certified.

3. **Require Aging in Place or Accessibility Improvements with Rehabilitation Programs:** A minimum requirement of all rehabilitation programs should require an assessment and implementation of improvements that will make units accessible for the population as it ages. This may be simple improvements like adding grab bars to more involved improvements like installing ramps. There should also be a focus on making those improvements in first floor apartments that limit the number of steps.

4. **Construct or Rehabilitate Accessible Apartments for Extremely Low Income Households, Elderly, and Veterans:** The demand exceeds the supply of extremely low income housing and there are multiple grant, funding and tax incentive programs that support very low income projects.

5. **Construct Market Rate Apartments:** There is a significant demand for market rate (nonsubsidized) apartments for those households earning 80% or more of HAMFI. Moreover, all growth scenarios predict a change in consumer preferences for apartments.

6. **Construct New Moderate Income to Market Rate Owner Occupied Housing or Rehabilitate Older Units to Meet the Need:** There is significant demand for owner occupied units above \$100,000 (2015 dollars), with the exception of those in the \$200,000 - \$250,000 range.

7. **Prepare for and Support the Development of Smaller Owner Occupied Lots:** Both national trends and the study’s community survey suggest that more residents are looking for smaller lots to reduce costs and maintenance.

8. **Construct/Rehabilitate Transitional Housing for Veterans** – With the exception of a handful of units available at the Veteran’s Administration campus, there is no transitional housing available in the County for Veterans.

9. **Build New Housing in Downtowns and Main Streets with sidewalks, trails, internet and amenities** – Almost 500 residents participated in County wide survey and a large majority indicated they would look for Downtown/Main Street locations if they were to move. Amenities such as trails, sidewalks and public transit were among the highest amenities requested. While not all housing options are appropriate or scalable to downtown, multifamily, townhome, small lot and rehabbed or re-repurposed housing options are suitable for downtown.

10. **Update Zoning Procedures and Prepare for Future Housing** – While a comprehensive review of municipal zoning ordinances and Comprehensive Plans suggested most communities promote most housing types, the reality is that some housing types, including multi-family housing, often get rejected at the Planning, Zoning or Municipal board levels for various reasons. If the market demand for specific housing recommended in this report is not met, it could potentially stunt economic development efforts and promote out migration of current residents.

11. **Provide Incentives for Market Rate Housing** – Grants or tax incentives should be provided to promote new construction and rehabilitation. The Return on Investment (ROI) to build new and rehabilitate existing housing units is low or negative.

Community Assessment Survey for Older Adults (2023)

The Community Assessment Survey for Older Adults (CASOA) gathers feedback from older adults to assess their needs and strengths. This data helps local governments, organizations, and businesses understand the resources needed to support an aging population. It allows stakeholders to shape public policy, educate the community, and sustain a high quality of life for older adults.

The report identifies housing as a key “Community Livability Topic” within the Community Design “Domain of Community Livability”. It states that a well-designed community enhances the quality of life for its residents by encouraging smart land use and zoning, ensuring that affordable housing is accessible to all, and providing mobility options to support residents aging in place.

The survey reveals that most older adults want to age in place; however, many do not have homes that feature universal design allowing access for walkers and wheelchairs and providing safety for those who are frail or experiencing mobility impairments. Ensuring the availability of housing stock that is both affordable and suitable for seniors is necessary as a community's population ages.

Genesee 2050 Comprehensive Plan (2023)

Genesee County recognized the importance of comprehensive planning in the late 1990s to preserve its character and quality of life. In 1997, the county adopted a plan in collaboration with stakeholders from various sectors. This plan was seen as a starting point, with ongoing involvement from individuals representing different levels of government, nonprofits, businesses, and citizens. The plan was updated to extend its scope to 2050, incorporating new voices and ideas. The update includes planning goals, objectives, policies, and programs to guide future development. Housing Opportunities is an element of the plan.

Housing Opportunities

- **“What We Know”:**
 - Genesee County's housing stock is primarily single-family homes, reflecting its rural setting, with about three-quarters of homes being owner-occupied.
 - The County's population has been stable for 30 years but is projected to grow incrementally by 2040, potentially changing with the buildout of the Western New York Science and Technology and Advanced Manufacturing Park (STAMP).
 - A full buildout of STAMP at 10,000 jobs could increase the County's population by 17%, or about 10,000 people, leading to demand for thousands of new housing units.
 - The COVID-19 pandemic has had far-reaching impacts on housing, with historic low financing rates increasing sales and tightening the market, but home ownership remains out of reach for lower income households.
 - Genesee County faces ongoing challenges such as maintaining older housing units, lack of accessible housing, housing shortages for the lowest income population, demand for higher-end rentals, and problems with housing stock and affordability, while also struggling to provide new housing within the guidelines of the Smart Growth Plan.
- **“What Does it Mean?”**
 - Nationally, about 20% of new housing is affordable for the middle class, creating a "missing middle" in the housing market, characterized by a lack of diverse housing types and affordability.
 - In Genesee County, 73% of housing is owner-occupied, with a similar proportion being single-family homes, contributing to the missing middle phenomenon.

- Although housing prices in Genesee County were slow to recover from the housing crisis of 2007-2008 and have been relatively flat since, housing choice and affordability remain significant issues.
- According to the Genesee 2050 survey, 80% of respondents consider housing choices very important (44%) or somewhat important (36%), but less than 40% are very satisfied (9%) or satisfied (30%) with their housing choices.
- A majority of respondents also consider housing prices very important (53%) or important (34%), but only about half are very satisfied (9%) or satisfied (35%) with housing prices, indicating a gap between importance and satisfaction levels.
- **“Why is this Element Important for Genesee County?”**
 - Genesee County's zoning ordinances and comprehensive plans encourage a mix of housing types, aiming for greater diversity.
 - Communities with dense downtowns, amenities, sidewalks, trails, and mixed-use buildings are ideal, similar to Ithaca, Corning, Sackets Harbor, and Saratoga Springs.
 - Despite the appeal of such communities, most Genesee residents prefer traditional single-family homes.
 - A survey for the Housing Needs Assessment found that 64% of respondents planning to move in the next five years are considering a single-family home.
 - Respondents' needs and wants are evolving; while 21% want larger homes, almost 36% want smaller homes.
 - Survey respondents are interested in amenities associated with denser communities, such as trails, sidewalks, public transportation, a downtown commercial center, public utilities, internet, and an aging-friendly public realm.
- **“Charting a Course for the Future”**
 - The COVID-19 pandemic has had unclear impacts on housing in Genesee County and nationwide, with ongoing updates available on the Genesee 2050 Hub Site.
 - State and federal laws protecting tenants unable to pay rent due to income loss were extended through August and October 2021, but federal funds for tenant assistance were slow to reach those in need.
 - Supply chain issues and price increases for building materials increased costs for new housing and caused delays in construction, with some housing starts being delayed or canceled.
 - Long-term, the housing market is expected to correct itself, but the cost of newly constructed homes may remain \$30,000-\$40,000 higher than pre-pandemic levels.
 - Genesee County faces a need for more housing of all types, with challenges including the age and supply of existing housing stock, threatening the county's ability to benefit from economic expansion.

- There is a need to incentivize investment in new housing, with the Genesee County Economic Development Center (GCEDC) exploring ways to contribute to solutions.
- Rental housing for the lowest-income tenants is often substandard, with owners of obsolete manufactured homes facing challenges in replacing them due to existing debt.
- New funding being debated in Congress could be transformational, considering housing as part of the nation's infrastructure, but until secured, new solutions are needed.
- Solutions are being considered for supportive housing, accessible housing, senior housing, and quality rural multifamily housing, with developments underway in various locations in 2021, albeit with funding gaps.

Genesee County Smart Growth Plan (2022)

Recommendations

- **Promote farmland protection outside of smart growth areas**
 - Coordinate with Agricultural District Program
 - Coordinate with Agricultural and Farmland Protection Plan
 - Encourage conservation of high-quality farmland through conservation easements
- **Zoning techniques**
 - Agricultural protection zoning
 - Density averaging (clustering)
 - Incentive zoning
 - Transfer of development rights
 - Form-based codes
 - Planned unit development (PUD)
- **Promote revitalization of city and village industrial areas, business districts, and residential neighborhoods**
 - Support the use of state-recognized New York State smart growth principles where appropriate
 - Encourage redevelopment and reuse of industrial sites and buildings in areas with access to infrastructure
 - Revitalize existing city and village business districts
 - Encourage local zoning regulations to be consistent with the smart growth plan
 - Encourage local and state infrastructure investments to be consistent with the smart growth plan

Appendix 2: Residential Tapestry Segmentation

In addition to the traditional demographic data from the U.S. Census Bureau, a Psychographic Segmentation was analyzed for Genesee County residents. Whereas the census data provide historical resident profiles in a particular geographic location, psychographics broadens the scope by identifying lifestyle habits, values, attitudes, and other defining attributes.

For this study, ESRI Tapestry Segmentation dataset—which classifies resident groups into 67 unique segments in easy-to-visualize terms based not only on demographics but also on socioeconomic characteristics—was analyzed for Genesee County residents.

According to ESRI, the segment called Salt of the Earth is the most prevalent in the county, followed by the Traditional Living, Midlife Constraints, Small Town Sincerity, and Rustbelt Traditions. Nearly eighty percent (79.1%) of all households fall in one of these five segments (Table 87).

Table 98: Top ESRI Tapestry Segments

	Genesee County Households %	All U.S. Households %
1. Salt of the Earth	44.3%	2.8%
2. Traditional Living	19.5%	1.9%
3. Midlife Constraints	7.1%	2.4%
4. Small Town Sincerity	4.3%	1.8%
5. Rustbelt Traditions	3.9%	2.1%

Source: ESRI, Urban Partners

The following pages show detailed profiles for the top segments.