



Figure 40. Proximity to Open Space. Source: City of Rochester

Neighborhood and City-Wide Amenities

Rochester residents are proud of their park system, which includes a growing number of small greening projects, small neighborhood parks, recreation centers and larger park systems that are draws for City and County residents alike. The entire City is within a 10-minute walk of a local park, athletic field, school playground, or recreation center, with the majority of blocks within a five minute walk. These local parks are anchored by regional open space attractions that stem from Frederick Law Olmsted's original designs for the City which began in 1888. Rochester is just one of four cities nationwide that offer an entire park system designed by Olmsted. Highland Park, Genesee Valley Park and Seneca Park were all designed by Olmsted and remain significant assets to the City and region. Since that time, Rochester has extended his vision through the creation of additional open space attractions including Cobbs Hill Park and Reservoir, Durand Eastman Park, Maplewood Park, and Ontario Beach Park. Three large cemeteries – Mt. Hope, Riverside and Holy Sepulchre – are also notable as their attractive greenery has had a positive impact on surrounding blocks.

Water has long played an active role in the City's open space. Lake Ontario serves as the primary amenity for Lake Ontario Beach Park, the Durand Eastman Park and the re-opened Durand Eastman Beach. High Falls, one of Rochester's most unique assets, has for quite some time been earmarked by the City for new development. The City has also rediscovered its Genesee River, with a trail that connects Lake Ontario, Turning Point Park and Seneca Park in the north to Genesee Valley Park and the Erie Canal Trail in the south through downtown.

While the larger regional parks provide for special programs and activities, much of what is experienced on a day to day basis by residents is the quality of neighborhood-based open spaces. The enhanced value that open space brings to housing is well documented, and there are many instances around the country where a central open space has served as the focal point for a growing level of public and private investment. Further, Rochester's commitment to greening as the "Flower City" is evident with well-maintained street plantings and a growing number of community gardens.

There are instances, however, where existing park spaces may seem physically removed from their surrounding communities. Due to limited visibility, deteriorated play equipment / fields, changes in topography / elevation or unattractive fencing, the potential of these parks to buoy the surrounding residential blocks has not been capitalized upon.



Athletic fields lacking strong connections to the surrounding community.



Examples of parks and trails in Rochester that are major neighborhood assets.



City and community greening projects.



Cultural assets in Rochester.

Rochester continues to be the center of culture and the arts in the region. The Strong National Museum of Play, the George Eastman House, the Rochester Museum and Science Center, the Memorial Art Gallery as well as the University Avenue Art Walk, the Corn Hill Arts Festival, the Lilac Festival, the Clothesline Festival, and galleries on Park Avenue anchor the ways in which the City is imagined and experienced by visitors and residents alike. Reflecting the City's musical legacy rooted by the Eastman School of Music, Rochester also has a thriving music scene: the City is home to 10 community orchestras, 20 community choral groups, the Rochester International Jazz Festival, and the Rochester Philharmonic Orchestra - the only orchestra supported by a mid-size city. Richard Florida's Creative City rankings in *The Rise of the Creative Class: and how it's transforming work, leisure, community and everyday life* place Rochester 4th in innovation and 25th in overall creativity nationally. These factors help to promote Rochester as a vibrant, urban destination that offers housing intermingled with attractive cultural destinations.

Downtown Rochester continues to blossom into the center of many activities. With an increasing number of new households, downtown is diversifying and expanding from an office core to one comprised of new entertainment, restaurants and attractions. The Center City Master Plan as well as the efforts of the Rochester Downtown Development Corporation have recognized downtown's potential and are working to bring about a sustained renaissance.

Rochester's universities and colleges remain a strong asset to the local economy. The University of Rochester is an anchor within the City, spurring redevelopment in the Strong neighborhood and, recently, across the River in Plymouth Exchange. It is the largest employer in Rochester and, combined with the Damon City Campus of Monroe Community College in downtown, continues to generate an influx of college aged students to Rochester's neighborhoods. The Rochester Institute of Technology, though located outside of the City, also contributes to this base of local students.



A mix of new and existing homes are attracting new downtown residents.



Figure 41. Local Institutions of Higher Education. Source: City of Rochester

- College or University
- 5-Minute Walk
- 10-Minute Walk



The University of Rochester, Eastman School of Music, and Monroe Community College serve as anchors and magnets for the City and downtown Rochester.

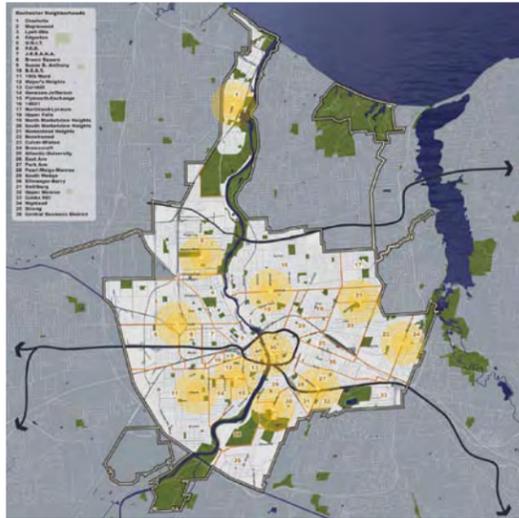


Figure 42a. Libraries
Source: City of Rochester

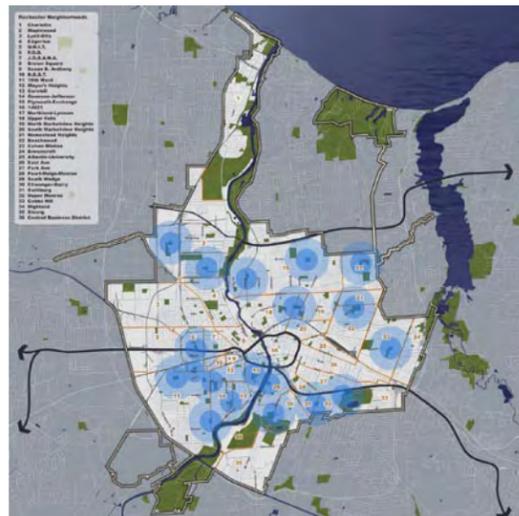


Figure 42b. Recreation Centers
Source: City of Rochester



Figure 42b. Community Centers
Source: City of Rochester

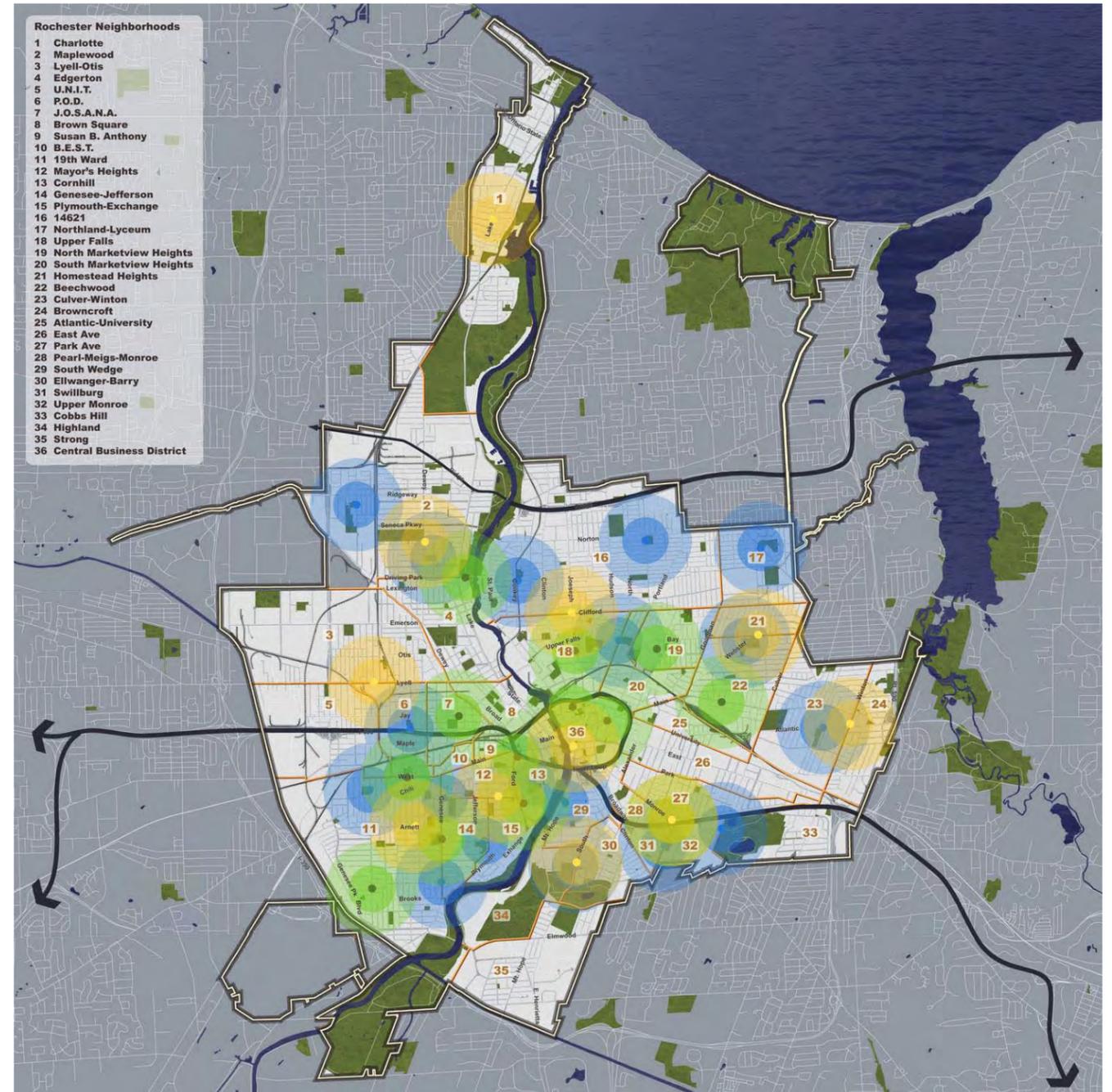


Figure 42d. Community Facilities Overlay. Source: City of Rochester

Many residents have ready access to a recreation center, library or community center within a five- to 10-minute walk from their home. Charlotte, Maplewood, 14621, Edgerton and Lyell-Otis are notable exceptions. Given that the highest proportion of families with children live in 14621 and Edgerton (see Figure 14 on page 21), these neighborhoods appear to be underserved with regard to recreation facilities and community centers.

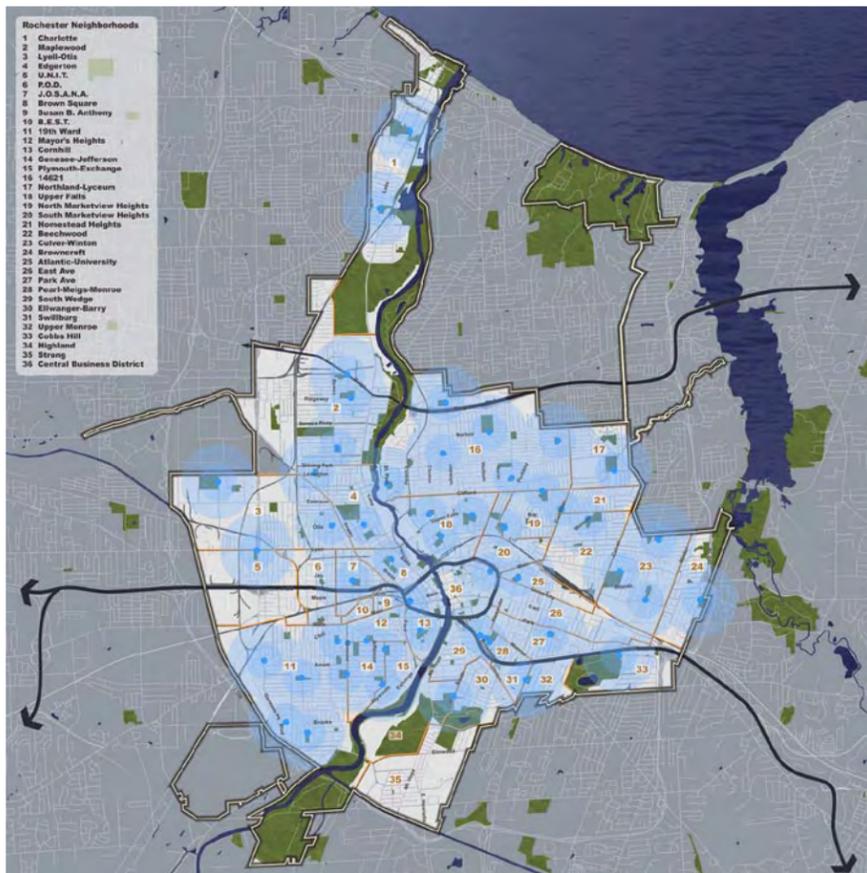


Figure 43. Public Schools. Source: City of Rochester



With the exception of the Strong neighborhood and the western edge of the City, most residents are within a five- to 10-minute walk of a nearby public school. Supplementing this network are a number of private and charter schools. There are four charter schools in the City, two of which are within a 10- to 15-minute walk of downtown. Private schools are primarily concentrated in the southeast and in the Maplewood area.

For families, schools remain one of the single largest issues in their choice of where to live. Although the primary perception is that local schools perform poorly, the reality is that some of the schools within the Rochester City School District are excellent. In fact, Rochester's Wilson Magnet High School was recognized in May 2006 as one of the best schools in the nation, ranking 24th on the "Challenge Index," a measure of International Baccalaureate (IB) and Advanced Placement (AP) program enrollment. In 2000, Wilson became the first school in Monroe County to authorized to teach the IB curriculum and the fourth in New York State.²⁰

²⁰ See <http://www.rcsdk12.org/IBWilson/index.htm>.

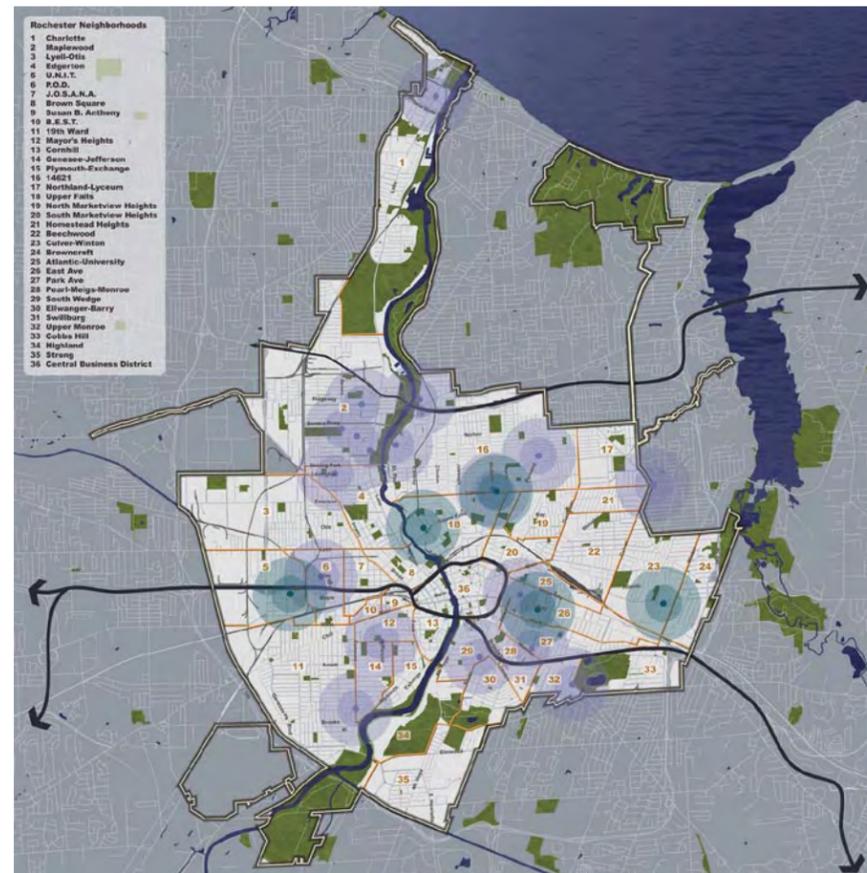


Figure 44. Private and Charter Schools. Source: City of Rochester



Given the value to be found within the public school system, many parents choose to send their children to local public schools despite the city-wide negative perception. It is clear that a primary concern of City residents is choice and predictability. Many participants interviewed expressed a desire for more local choices in terms of the need for additional charter schools. Others expressed discontent over current policies that do not guarantee that a child living in a specific neighborhood will be sent to the local school. In essence, many feel that local schools are not neighborhood schools.

While these are important factors for any neighborhood investment policy, addressing the real and perceived issues of schools requires thoughtful and committed long-term planning. Additionally, as documented in the accompanying market study, only a small portion of new households in the City are looking at schools as a factor impacting their decision. This builds on historic trends of increased city living by empty nesters, unmarried couples and other non-traditional family types. Thus, as schools remain a

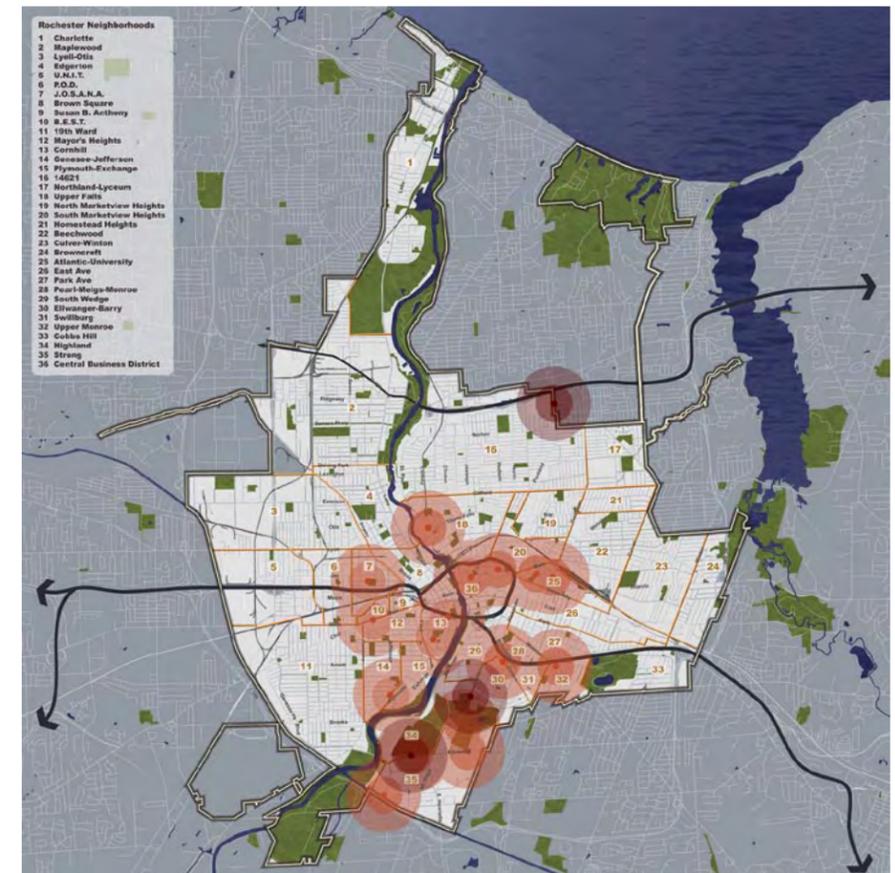


Figure 45. Health Centers and Hospitals. Source: City of Rochester



real issue to be addressed within the context of broader neighborhood revitalization, they are often not the largest factor in determining living patterns.

Almost all of the public and private health centers are located in the southeast and southwest areas of the City, extending northward into downtown. Only three centers are located north of the inner loop – one in J.O.S.A.N.A. on Orchard Street, Jordan in Upper Falls and Wilson at the City / County boundary near Ridge Road. Rochester is best known for the Strong Memorial Hospital, which is consistently ranked as one of the best in the nation, as well as the Rochester General Hospital which has New York's 4th largest cardiac center.

A list of Libraries, Recreation Centers, Community Centers, Public Schools, Private Schools, Charter Schools, Health Centers, and Hospitals is provided in the Interface Studio Appendix to this Study.

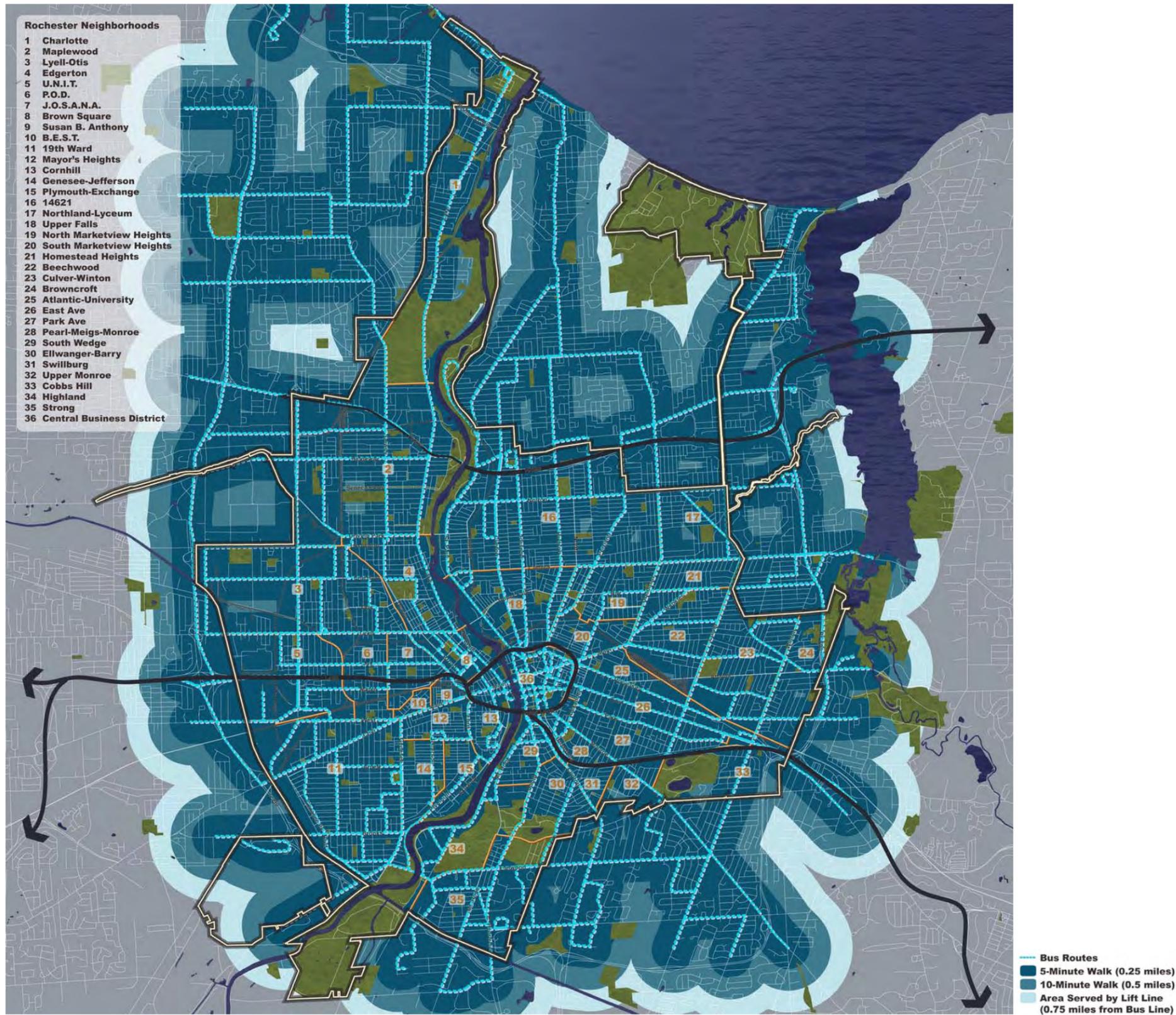


Figure 46. Proximity to Public Transit. Source: Rochester Genesee Regional Transportation Authority

For non-drivers or those without a car, accessing any of these neighborhood assets can be a significant challenge. The entire City is within a five-minute walk to a Regional Transit Service bus line, the majority of which are located on the City's main streets. However, those taking public transit face long waits, even during peak hours, and many bus lines connect only through downtown. For disabled passengers, the Lift Line is available, which requires a reservation a day in advance and flexibility, as pick up times are assigned within one hour of the requested reservation time.

Summary

The combination of these quality of life and physical characteristics reflects many of the trends documented in the socio-economic data. Rochester is physically unique with a number of assets and characteristics that provide a strong foundation from which to build a neighborhood revitalization policy. These include the diversity of local open spaces, numerous cultural attractions and historic neighborhoods. At the same time, many trends in the City are also faced by other cities both in Upstate New York and across the country. From crime to a continual increase in vacancy rates in 'inner city' neighborhoods, Rochester faces significant challenges. The last part of this Atlas reviews the impacts of these characteristics on Rochester's housing environment.

HOUSING TRENDS IN ROCHESTER

Occupancy Status

There has been a long-standing concern in Rochester regarding the plummeting homeownership rate. In 2000, only 40 percent of occupied housing units were owner occupied. This is compared to the national average of 66 percent and 76 percent for Monroe County (including the City). This figure puts Rochester in the lowest tier of multiple national rankings:

- 24,539 out of 25,117 total cities in the U.S.;
- 226 out of 245 of the U.S. cities with 100,000 or more residents; and
- 80 out of 88 of the U.S. cities with 200,000 or more residents.

There are only a few neighborhoods with owner-occupancy rates above 60 percent. These include Northland-Lyceum, Culver-Winton, Browncroft, Cobbs Hill, and pockets within Charlotte, Maplewood and the 19th Ward. The area with the highest ownership rate in 2000 is in Charlotte, immediately north of the Riverside and Holy Sepulchre Cemetery.

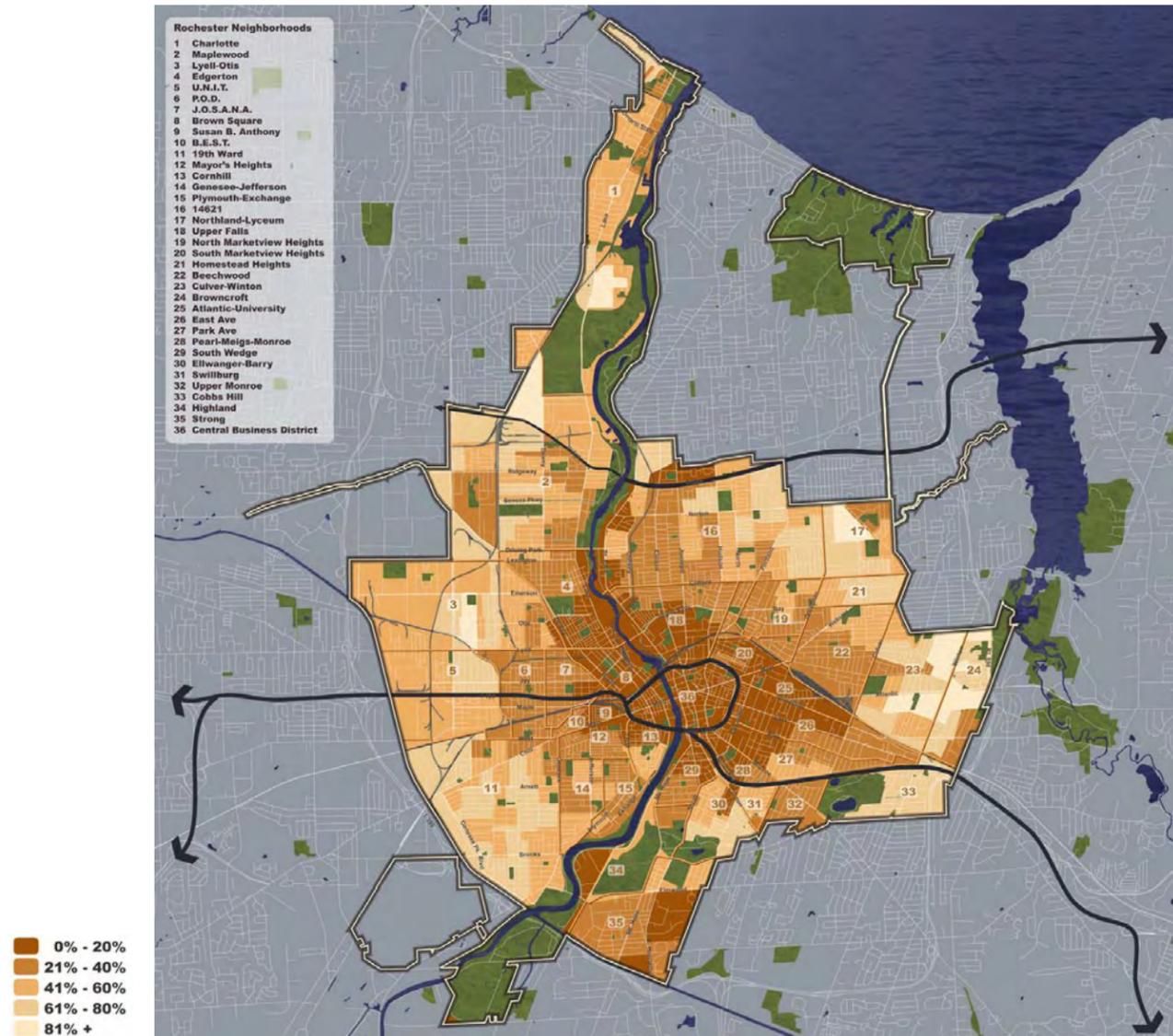


Figure 47. Percent of Occupied Housing Units Owner Occupied, 2000. Source: U.S. Census, 2000

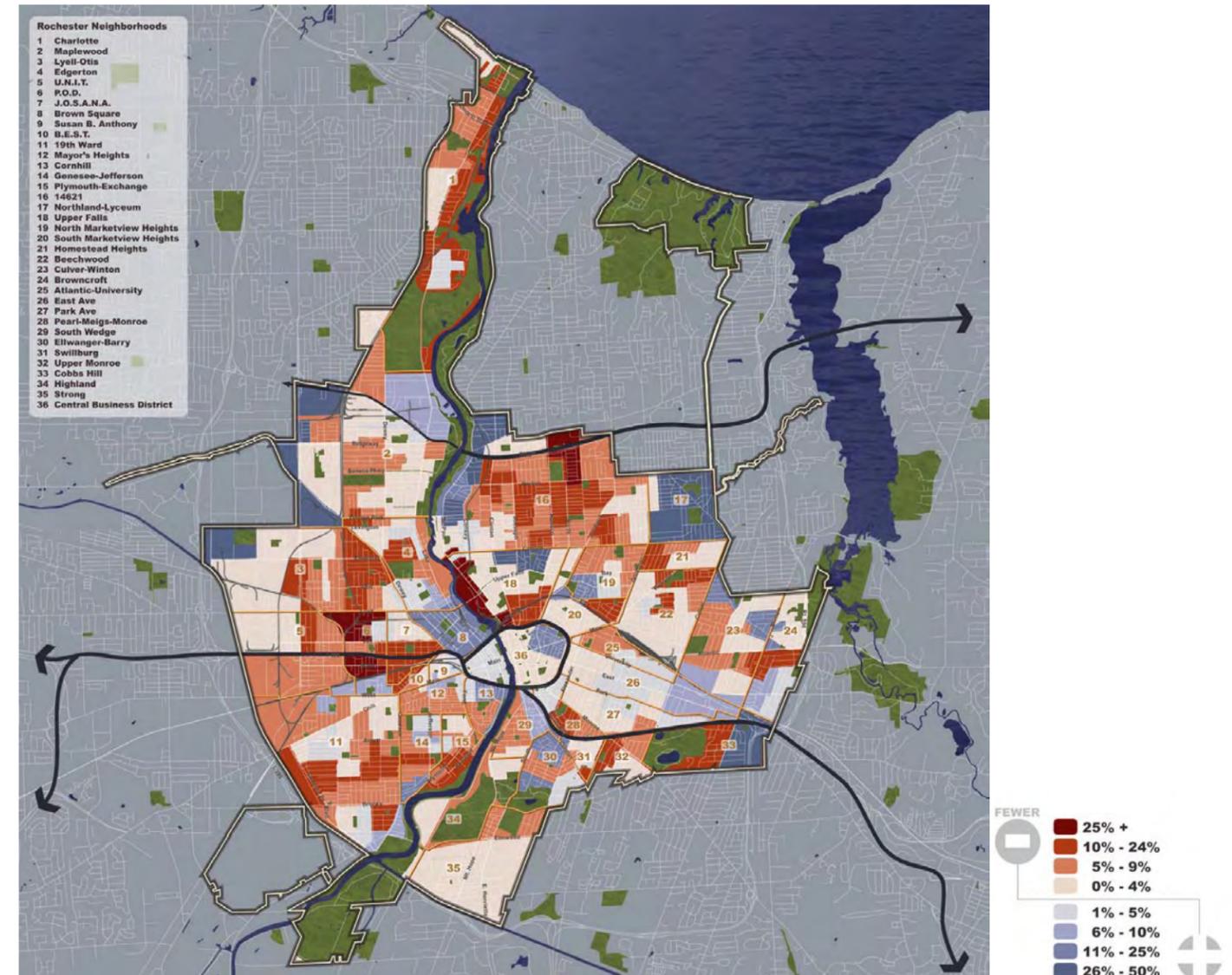


Figure 48. Percent Change in Owner Occupied Housing, 1990-2000. Source: U.S. Census, 1990 and 2000

The opposite trend is apparent in a swathe of the City stretching from Edgerton southeast through downtown into Park Avenue and East Avenue. These neighborhoods all have ownership rates of less than 20 percent but for very different reasons. Park Avenue and East Avenue comprise a lot of market-rate rentals for students and young couples. Stretching north from downtown into 14621 and extending west into neighborhoods such as Edgerton, Brown Square, P.O.D. and J.O.S.A.N.A., the rental units comprise more subsidized units and represent a continuing out-migration of owners from these neighborhoods.

Unfortunately, these figures are just the latest of a long trend toward a rental dominated City. As the numbers of home owners fell, the number of renter-occupied housing units actually increased – by 833 in the 1990s. Almost all neighborhoods in the City experienced a continued drop in homeownership, and much of the overall decrease was due to a 27 percent decline in white owner-occupied homes. At the same time, the number of minority owners increased by 30 percent.

The only places where owner-occupancy increased are in a limited number of small pockets scattered across different neighborhoods including South Marketview Heights, Northland-Lyceum, Maplewood, 14621 and Ellwanger-Barry to name a few. Many of these areas have witnessed these increases due to recent City or not-for-profit investment in new housing, which transformed formerly vacant land into owner-occupied units.

Claritas estimates for 2006 indicate that the ownership rate has remained steady in the City since 2000 yet increased four percent in Monroe County.

Housing Type

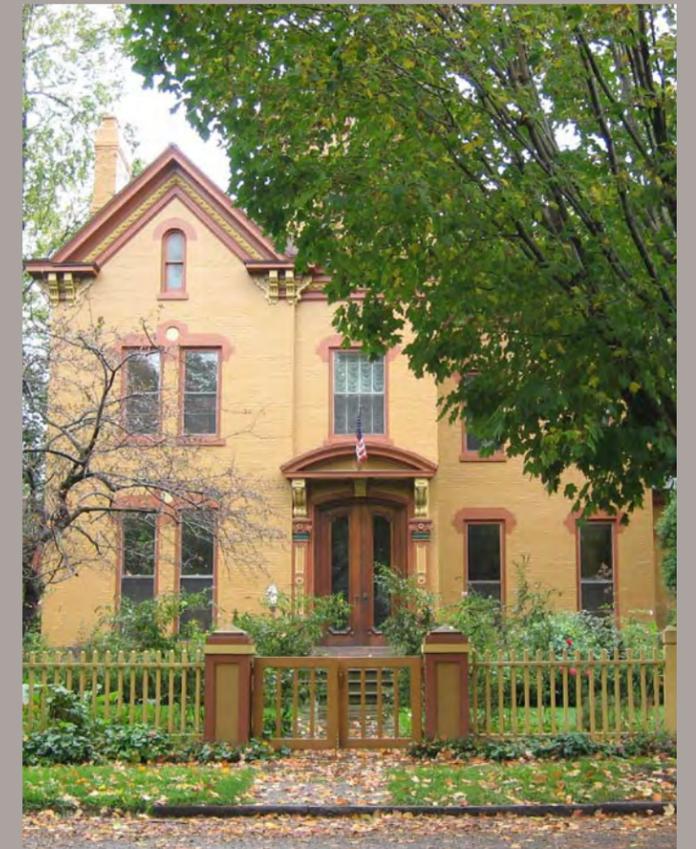
The majority of Rochester’s housing stock (47.5 percent) is single-family, and only 4.5 percent of housing in Rochester was built since 1980. This combination of an aging housing stock with a limited range of available housing products brings specific challenges in the context of changing market preferences. Nationally, a growing number of families are looking for different housing options beyond the standard single-family detached home. Interest in single-family homes on smaller lots, townhomes, apartments, lofts and condominiums have all spiked within cities. The response in Rochester has been a push for new housing products in and near downtown combined with the adaptive reuse of existing homes to accommodate the demand for apartments. Through this process, Rochester’s existing and aging housing stock has evolved in multiple ways. In some areas, the housing has retained its value, exhibiting high median sales and / or higher rents in such neighborhoods as Park and East Avenues. In others, the housing stock has declined significantly concurrent with declining homeownership rates.

Numerous concerns have been expressed by participants in this Study about both the ownership rate and the quality of the rental market in the City. Many of the larger homes have long been converted to two-, three-, or four-family rental properties. In fact, two- to four- unit structures comprise a third of all units in the City, and some neighborhoods are composed of up to 50 percent of these unit types including Marketview Heights, Brown Square, Edgerton, and Pearl-Meigs-Monroe. The size and cost associated with upkeep of many homes has impacted the physical quality of these structures – some past the point of no return. In response, the City has stepped up demolition in certain neighborhoods but, similar to many cities, there is an ongoing tension between the desire to save older homes and the need to clear unsafe structures.

As indicated by numerous participants in this Study, a significant cause behind the City’s deteriorating housing stock is the increasing number of “reluctant” or “accidental” landlords. Unable to sell their homes to recoup their costs, these owners end up renting their property as a last resort. These landlords are usually unprepared for the actual cost and work necessary to find tenants and maintain the property. The properties then deteriorate and further diminish both the image of the block and value of adjacent homes. The 1998 American Housing Survey by HUD (the last year data was collected for Rochester) indicated that 777 households in the City – 8.9 percent of occupied homes – were identified as having experienced moderate or severe physical deterioration of their place of residence. Despite this deterioration, it should be noted that the conversion of single-family homes offers a unique rental experience in the City. The majority of rental structures outside of the City are found in large, often dense developments. In contrast, the City’s stock of converted housing offers lower densities than those found in the County as well as urban amenities in closer proximity. The drawback is that these conversions rarely accommodate those with disabilities.



Source: Rochester City Hall Photo Lab



Rochester’s housing stock.



Rochester's housing stock.

Rochester's housing stock.

Recent and ongoing residential reinvestment in Corn Hill, South Marketview Heights, and Grove Place.

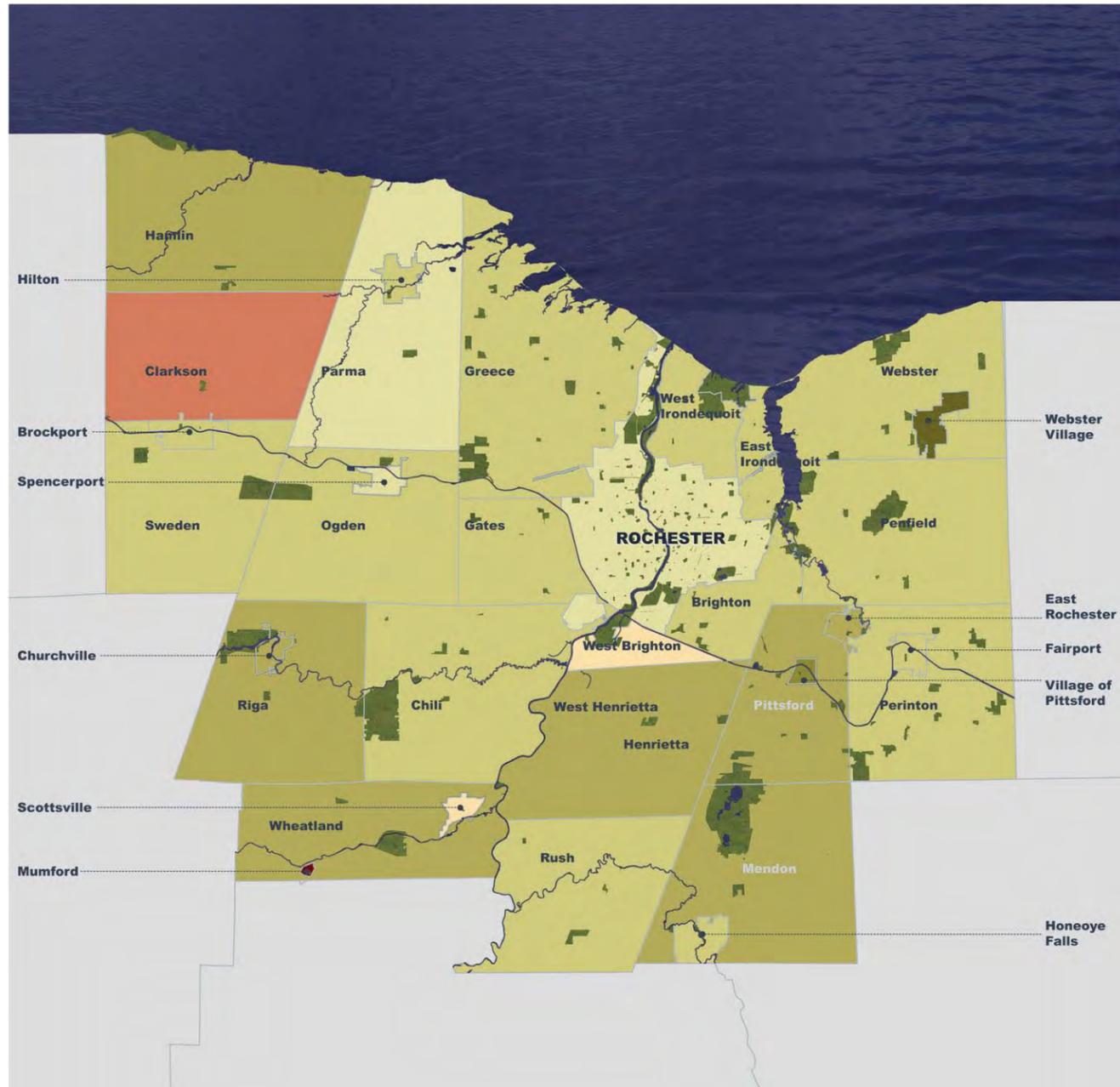
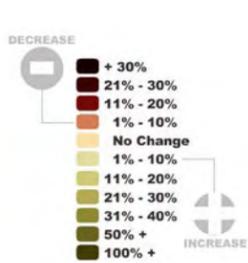


Figure 49. Percent Change in Median Single-Family Detached Sales Prices in Monroe County Municipalities, 2001-2005. Source: MLS Data provided by GRAR



Homeownership Market

As it relates to housing sales, Rochester has long been one of the slowest growing metropolitan areas nationally in terms of sales price increases. Along with other cities such as Buffalo and Rockford, IL, Rochester has not seen the wild speculation and price fluctuations exhibited in other cities.

Using Multiple Listing Service (MLS) data provided by the Greater Rochester Association of Realtors, the sales trends in Monroe County were calculated from 2001-2005. (The MLS data is provided in

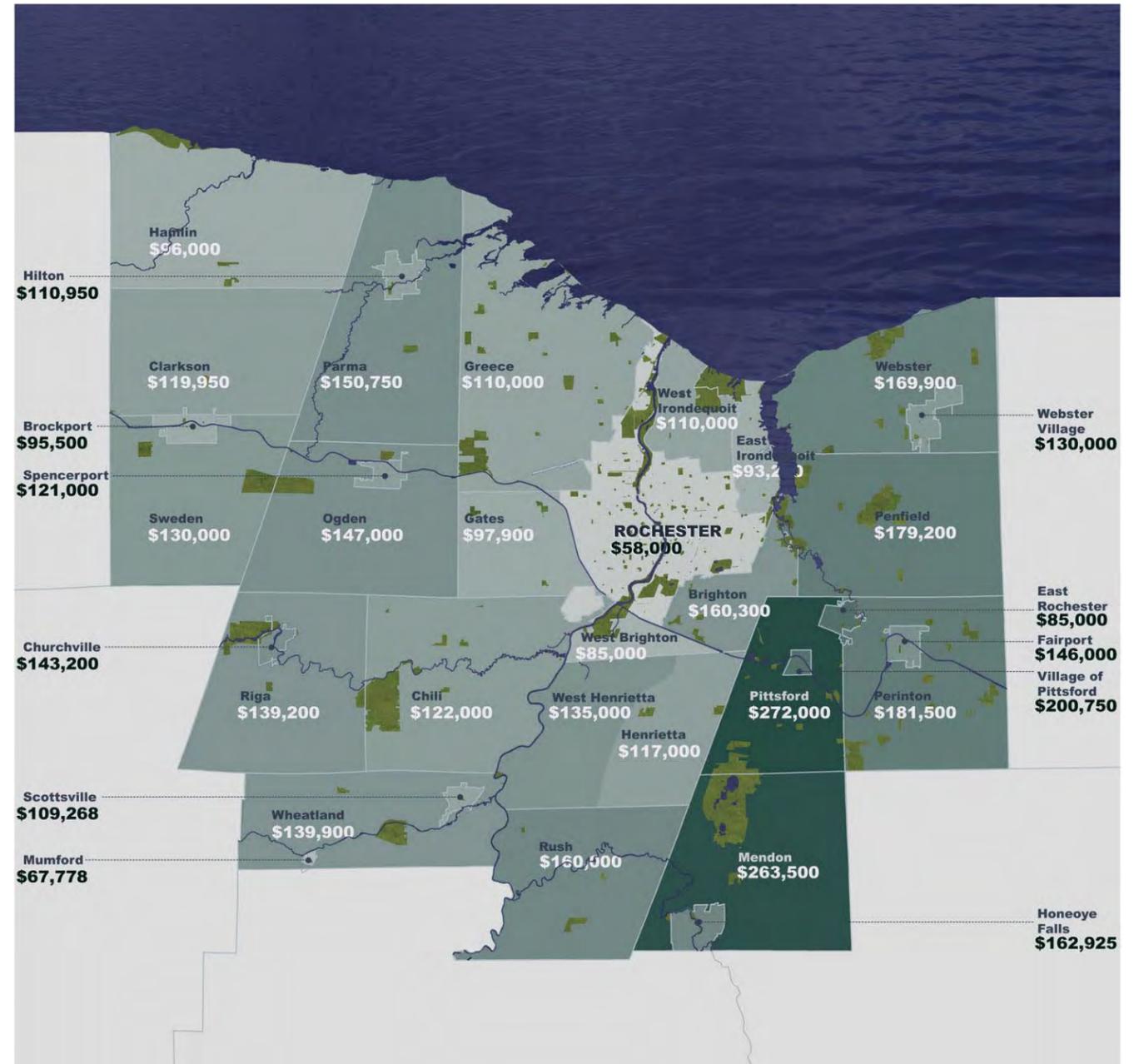


Figure 50. Median Single-Family Detached Sales Prices in Monroe County Municipalities, 2005. Source: MLS Data provided by GRAR



tabular format in the Interface Studio Appendix to this Study). A total of 45,657 sales were recorded, 86 percent of which were single-family detached homes. Only 22 percent of these sales occurred in Rochester, while the remaining sales (30,489) were located outside of the City in the County. Rochester's median sales price for single-family detached homes climbed from \$54,000 to \$58,000 during that time, a seven percent increase. In contrast, the County's median sales price for single-family detached homes climbed 15 percent to \$139,900. The County's strongest median sales prices were found in Pittsford at \$272,000 and Mendon at \$263,500 in 2005. The majority of County townships saw increases in line with the County-wide price change while some townships experienced minor median price increases (Parma) or losses (West Brighton and Clarkson).

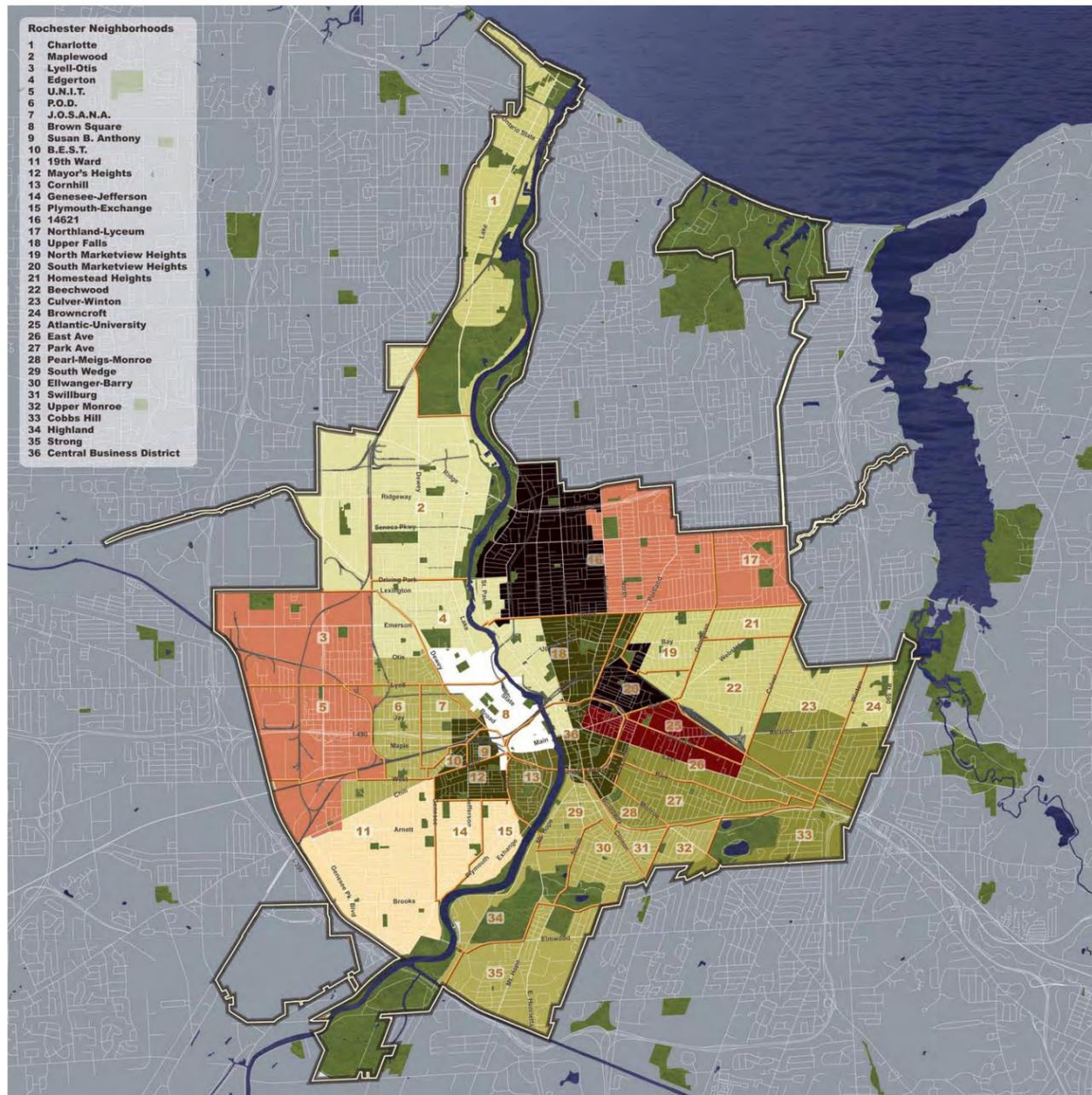
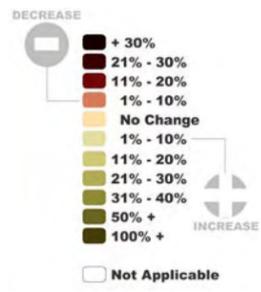


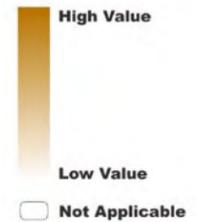
Figure 51. Percent Change in Median Single-Family Detached Sales Prices by City Assessment Districts, 2001-2005. Source: MLS Data provided by GRAR
 Note: Assessment Districts do not conform to neighborhood boundaries.



Unlike the County, the City experienced a wider range in median sales price change for single-family detached homes, which accounted for 73 percent of all sales. The western portion of 14621 dropped in median sales price by 39 percent to \$24,000 with 525 total sales since 2001. South Marketview Heights also experienced a 30 percent loss, but there were far fewer sales (21). Mayor's Heights, Susan B. Anthony and portions of Pearl-Meigs-Monroe and Upper Falls saw dramatic increases in median sales prices, but each of these



Figure 52. Median Single-Family Detached Sales Prices by City Assessment Districts, 2005. Source: MLS Data provided by GRAR



areas were severely undervalued in 2001. Each of these areas had less than 50 total sales since 2001. The southeast continued to experience price increases, with at least a 21 percent surge in median sales prices and a large number of total sales. The highest numbers of recorded sales occurred in the 19th Ward, Northland-Lyceum / the eastern edge of 14621, Beechwood / Culver-Winton and Maplewood including the northern section of Edgerton.

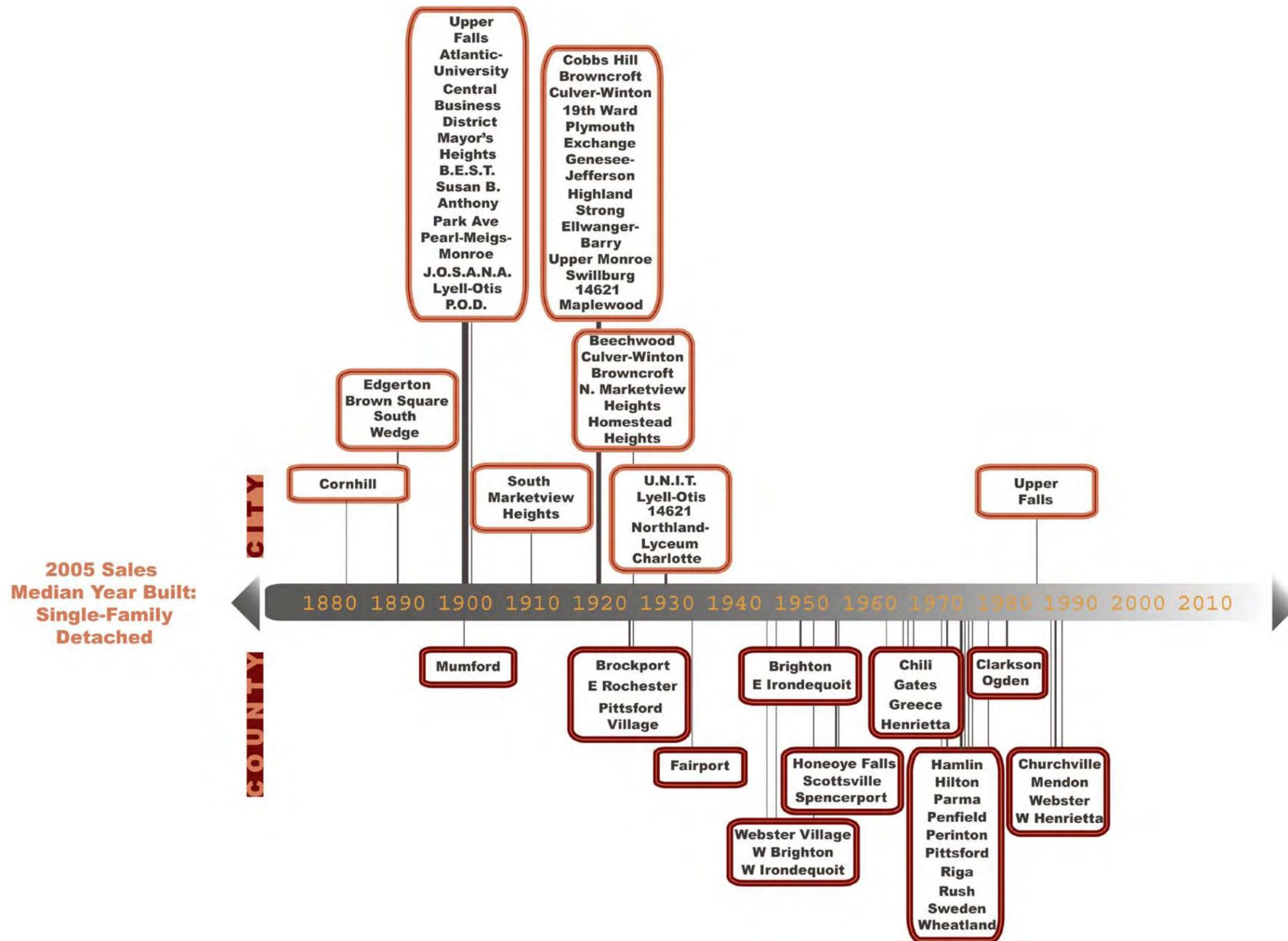


Figure 53. Summary of the Median Year Built for Single-Family Detached Houses Sold in Monroe County, 2001-2005. Source: MLS Data provided by GRAR

In 2005, the median sales prices for single-family detached homes reflect many of the perceptions and realities of the City. The southeast remains strong, and areas closest to downtown such as Corn Hill exhibit healthy market activity. The lowest median prices in 2005 were found in Upper Falls, Brown Square, Mayor's Heights, J.O.S.A.N.A., P.O.D., Susan B. Anthony, B.E.S.T. and the South Marketview Heights neighborhoods.

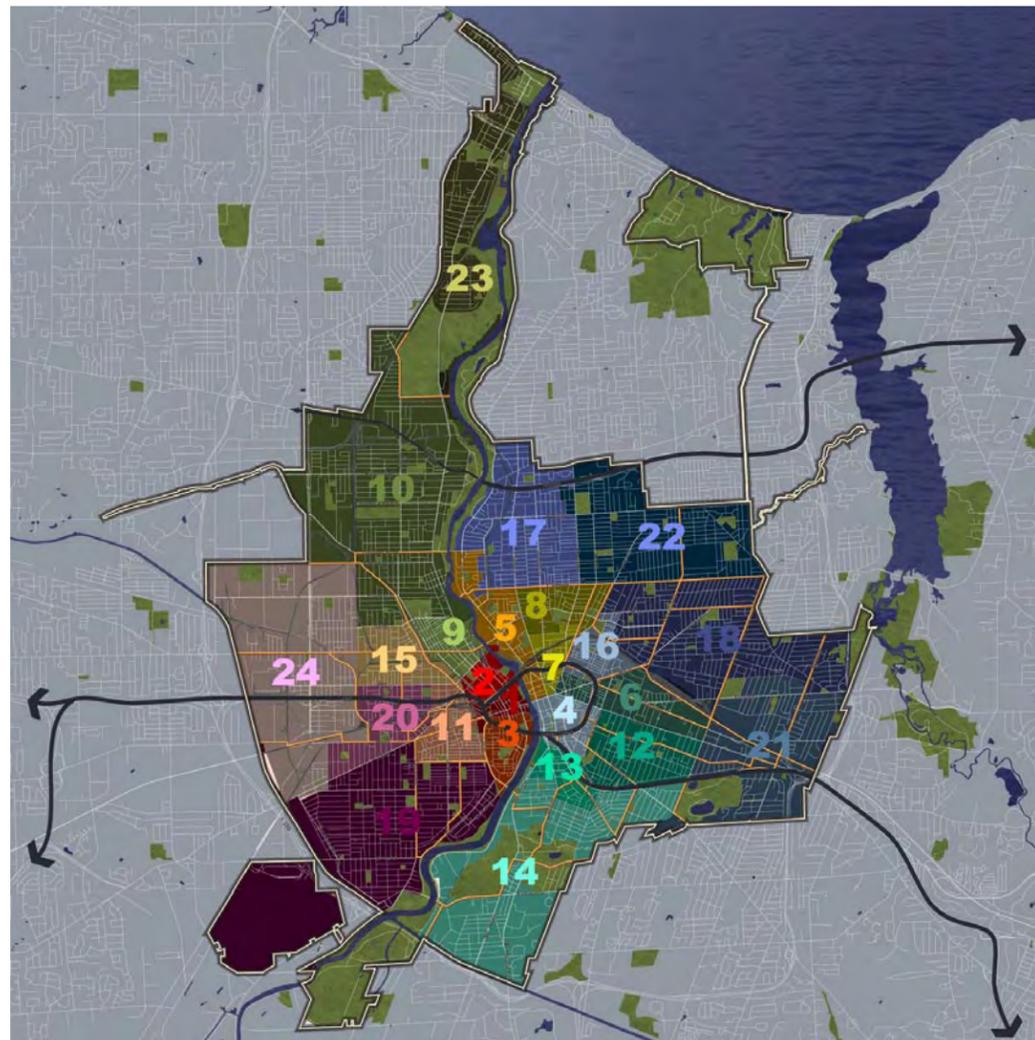
In reviewing the 2005 median sales by median year built, it is clear that the majority of single-family detached sales in the City reflect its older housing stock. As experienced by neighborhoods such as Corn Hill, older stock can, in fact, differentiate the City and its housing products from the more limited choices in the County.

In comparing median sales prices from different neighborhoods in the City to County townships, specific neighborhoods such as East Avenue and Park Avenue mirror the median sales values of single-family detached homes in Perinton and Penfield – some of the highest valued townships in the County. Other neighborhoods such as Atlantic-University and Corn Hill are similar to West Henrietta, Wheatland, Churchville and Fairport in the County. The 21st Assessment District, which includes Browncroft and Culver-Winton, posted higher median single-family detached sales than the Gates, Hamlin, Brockport and East Irondequoit townships.

The high sales prices for single-family detached also compare or exceed County high sales at times. High sales were posted in Charlotte and Browncroft that exceed the high sales in all County townships except Brighton, Pittsford, Webster and Mendon.

The City accounts for 87 percent of County multi-family sales and 10 percent of County condominium sales. Since 2001, both the County and City percent share of units sold for single-family detached declined. In its place is a growing number condominium and townhouse sales. For multi-family median sales, Rochester's median sales price was almost \$57,000, almost \$10,000 less than the County's. More telling is that the median sales price for condominiums and townhomes swelled by 52 percent in the City with a 2005 median price of \$120,000. Sales at The Sagamore on East reflect this trend and posted the highest County sales for that year. The average median sales price in the same year excluding the City reaches \$113,000.

These growing trends indicate a desire for a more varied housing stock. Recent projects completed in and near downtown have helped to change the perceptions of what people will buy. Given the national trends and recent move toward urban living in Rochester as expressed by the success of downtown projects, there is a continued need for new designs and products that affirm Rochester's underlying urban character.



Assessment District Locator Map.



Figure 54. Comparison of Median Single-Family Detached Sales in the City and County, 2005. Source: MLS Data provided by GRAR

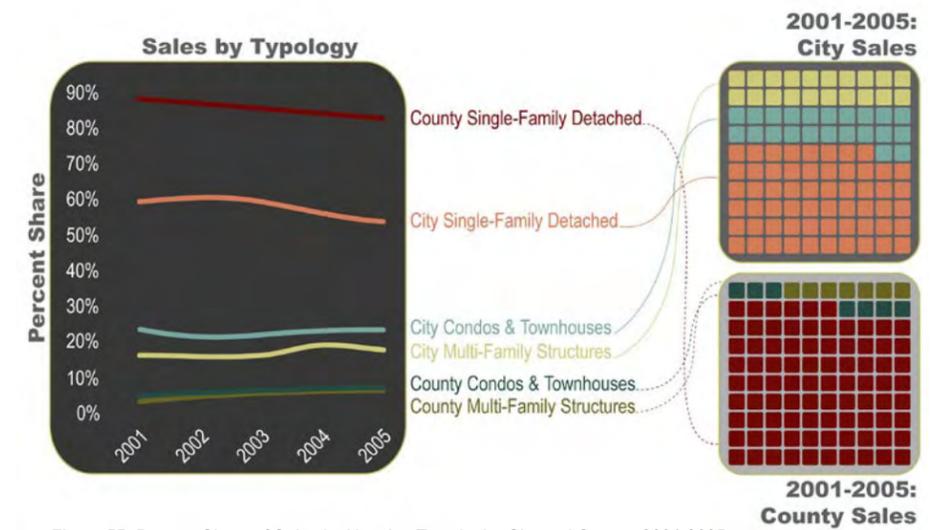


Figure 55. Percent Share of Sales by Housing Type in the City and County, 2001-2005. Source: MLS Data provided by GRAR

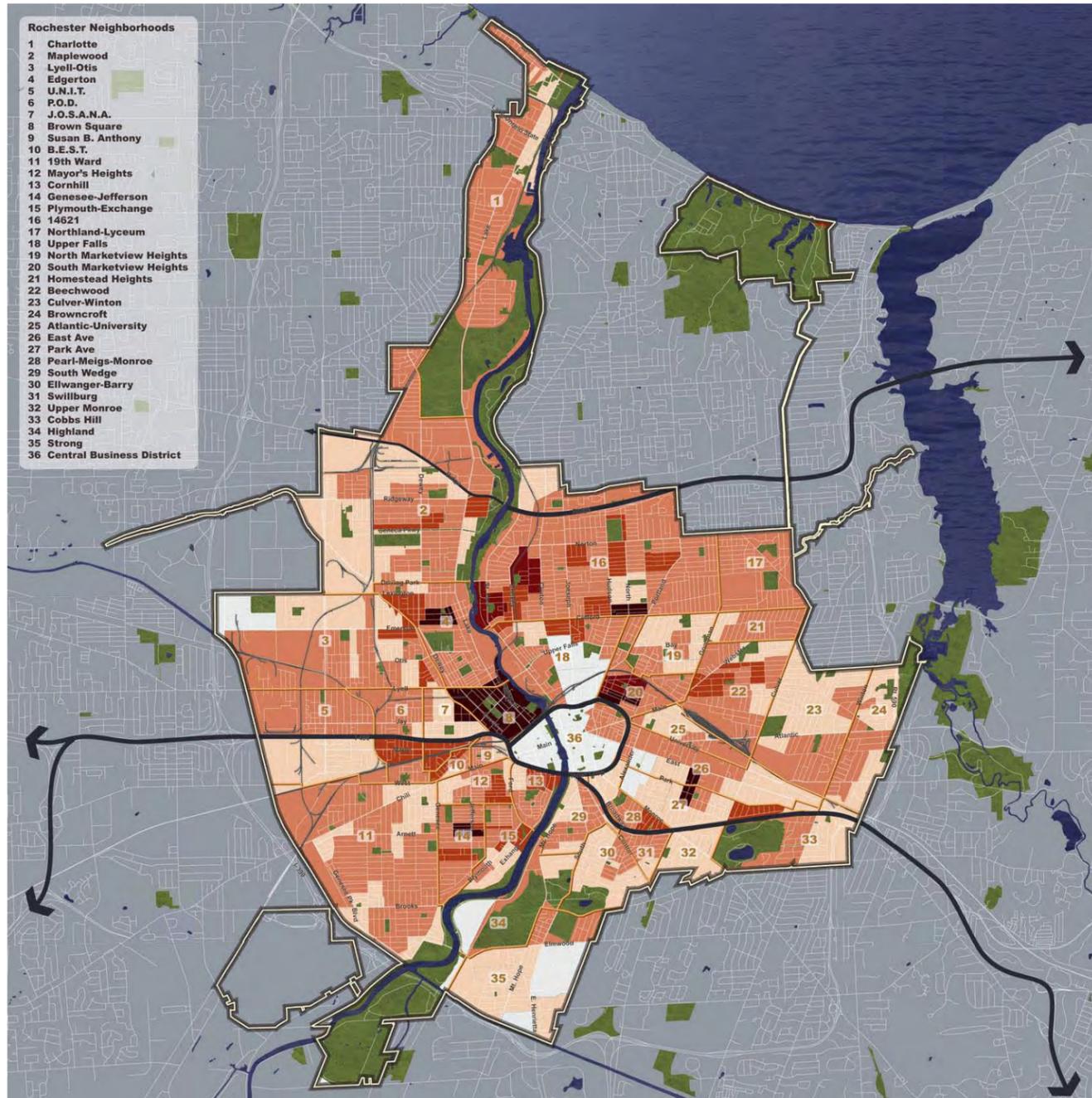


Figure 56. Percent of Owner Household Income Spent on Monthly Housing Costs (with Mortgage), 1999. Source: U.S. Census, 2000



While Rochester's median sales prices remain low, particularly compared to County prices, there remains a large proportion of homeowners that pay above 30 percent of their income on housing costs. According to 1999 Census data, the median monthly owner costs exceeds 30 percent of household income for 29 percent of all households in the City. The trend is particularly clear in portions of the South Marketview Heights, 14621, Brown Square and Edgerton neighborhoods, where families are paying greater than 40 percent, and at times, 50 percent of their monthly income toward housing owner costs.

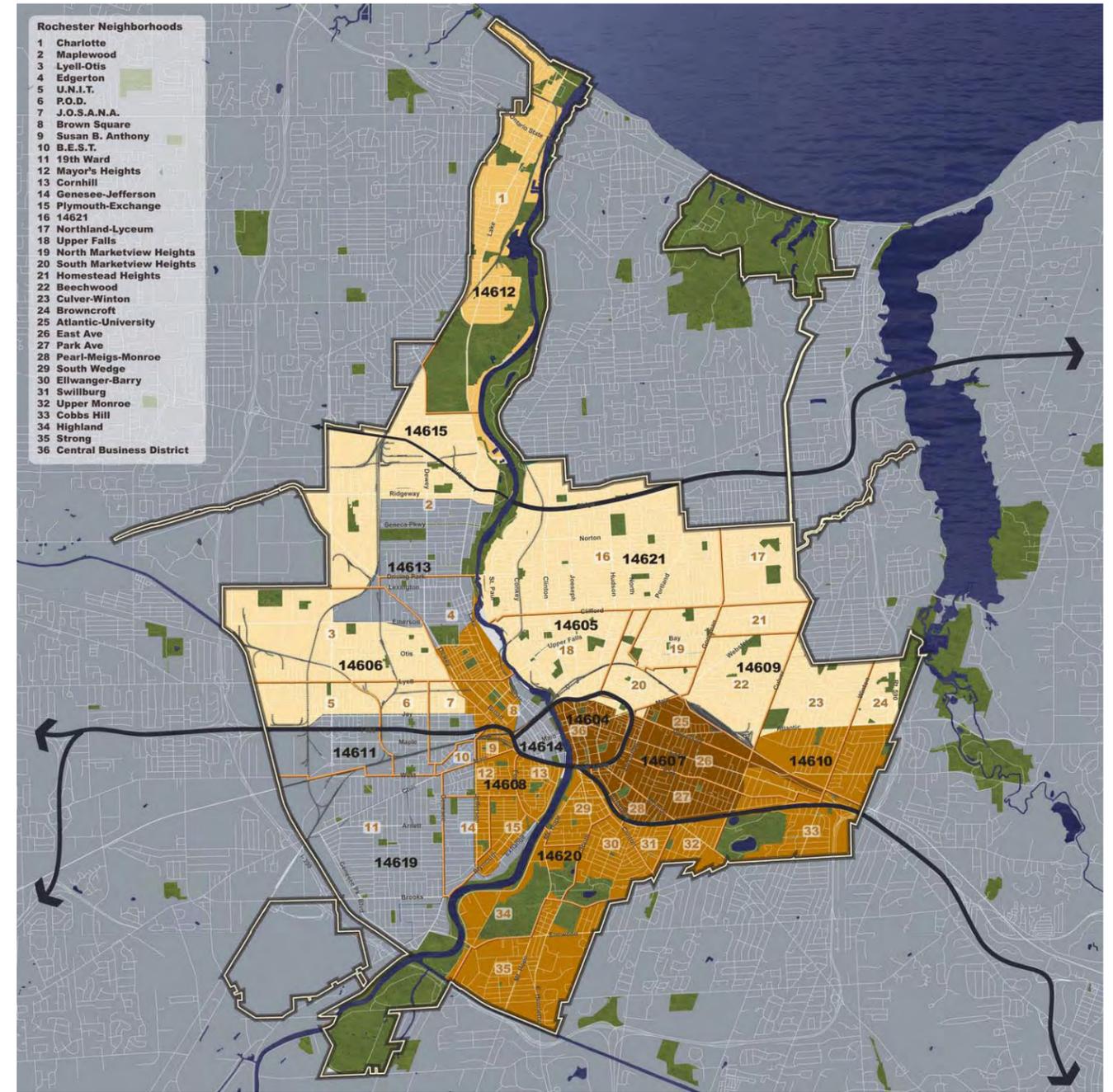


Figure 57. Unsubsidized Rental Rates for Apartment Complexes by Zip Code, 2007. Sources: The Housing Council Rental Registry, www.rent.com, www.rochester.therentalguide.com, ZVA Market Study



Rental Housing

Large apartment complexes and large single-family homes that have been converted into multiple apartments comprise the majority of the rental market in Rochester. Rents at apartment complexes are significantly higher than rents for apartments in modified single-family homes or small apartment buildings. For example, the average two-bedroom rent at an unsubsidized apartment complex is \$791 versus \$515

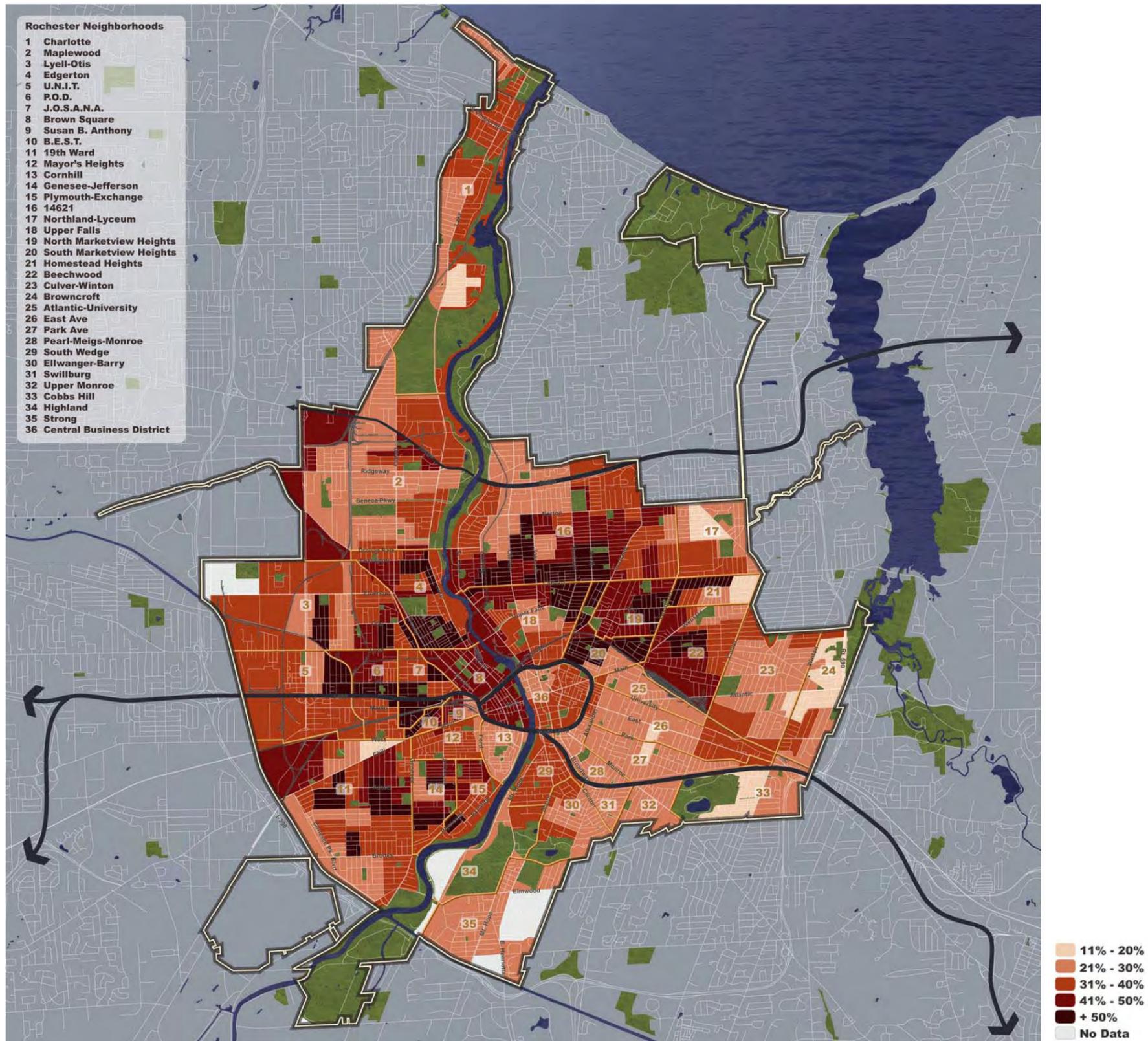


Figure 59. Percent of Renter Household Income Spent on Median Gross Rent, 1999. Source: U.S. Census, 2000

a significant problem in the City of Rochester. Based upon data from the 2000 Census, in 1999, 50 percent of all renter households in Rochester were paying more than 30 percent of their income for rent. Of more concern is the fact that, in 1999, 29 percent of all renters were paying more than 50 percent of their income for rent. These high rent burdened households, while found all across the City, are primarily located in lower rent cost areas.

Summary

The market trends in Rochester and the surrounding County have indeed remained flat for some time. There has been slow growth in the County, largely supported by the loss of households from some City neighborhoods. While Rochester missed the speculation and increased investment in cities during the national housing boom, there is a growing market for urban living and a need for new products to capture this market. In fact, according to Moody's Economy.com, Rochester is projected to rank first in the northeast (including Delaware through Maine) in terms of price appreciation in 2007. At a modest 4.5 percent, this reflects the slowdown of the housing market in other areas such as New York City and Philadelphia but also the comparative advantages Rochester has over other upstate cities.

For Rochester to fully leverage its assets, an integrated look at the health of neighborhoods is a necessity. The next section overlays key pieces of the data collected in this chapter to arrive at a rating system for neighborhood health.