NORTH STAR DESTINATION STRATEGIES

making communities more competitive

Montgomery County, NY

Final Report

March 23rd, 2015

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INTRODUCTION

About North Star Destination Strategies

North Star Destination Strategies comprises over two dozen talented individuals dedicated to growing destination brands through integrated marketing solutions. North Star offers communities a combination of research, strategy, creativity and action. This process – called Community BrandPrint™ – provides direction for the community's brand development, like a blueprint guides the construction of a home. And just like a blueprint, the priorities and targets of each Community BrandPrint™ are stated in clear and unambiguous language. The resulting brand personality is as revealing as an individual's fingerprint, and just as unique.

About the BrandPrint Process

Through the Community BrandPrint™ process, North Star determines Montgomery County's most relevant and distinct promise. From that promise, we create a strategic platform intended to generate a brand position in the minds of residents, visitors and businesses. We then develop powerful Brand Action Ideas and a Brand Identity Package (creative expressions), all of which reinforce the positioning and ensure brand equity and growth.

This process is divided into four stages: Understanding, Insights, Imagination and Evaluation.

EXECUTIVE SUMMARY

Branding Partners

The City of Montgomery County contracted with North Star Destination Strategies to determine Montgomery County's true, unique and relevant brand position to help the community stand out in the marketplace. This Executive Summary represents a snapshot of the critical highlights from phases of the BrandPrint process for Montgomery County: Understanding, Insights and Evaluation. Detailed findings are compiled in the report that follows.

Understanding

North Star conducted more than a dozen pieces of research to identify what differentiates Montgomery County from its competitors. By examining the community (resident and business stakeholders), consumers (visitors, site selectors, regional/state officials in tourism and economic development) and the competition (neighboring and other counties), North Star determined a strategy for Montgomery County to assert across all community assets to implement an effective, meaningful and relevant brand. Findings are summarized below.

EXECUTIVE SUMMARY

The research revealed many advantages in Montgomery County. Situated on major transportation assets like the NY Thruway as well as rail, Montgomery is conveniently located between their Capital Region of Albany and other upstate centers like Utica and Syracuse. Affordable and available land make a strong business case for relocation here with an abundance of hard working talent. Agricultural interests are strong with easy access to large markets.

The spectacular landscapes whether pastoral farmland or the majestic Mohawk and nearby Adirondacks make Montgomery County a beautiful place to live. It's like an outdoor recreation playground out your back door. No chaos. Just fresh air. A nice distinction from the crowded, choked air of the city that is just a few miles away. Montgomery County offers a range of communities to fit most interests looking for a more comfortable pace and a fuller wallet. Add in a great quality of life around youth or semi-pro sports, and you have a strong foundation for building the future you choose.

EXECUTIVE SUMMARY

Although brands are not built around anything negative, those perceptions were also gathered. This information can often direct communities to priorities in managing their reputation. Montgomery County suffers from some negative perceptions including remote and hick towns. There is pride in the upstate area here but no demonstrative pride in the County. Many bemoan a lack of a cohesive image for the area and indecision on a strong vision. Blight is a concern of several as are weak schools or at least that perception. Montgomery County offers little entertainment and lacks hotel product for business travelers. Research also pointed to a lack of amenities that young professionals seek. The economic downturn in recent years is still impacting growth in Montgomery County. The community struggles to attract significant investment from the private sector.

But Montgomery County is primed for growth particularly with new leadership and a stronger regional focus collectively leveraging the advantages of a greater area to benefit those in Montgomery County. The determined nature of those in Montgomery is a compelling point for growth. It is a characteristic that businesses seek in a talent pool. It promises greater productivity. And the quality of life in such a beautiful setting will attract those who want to escape the hustle and hassle of larger metros. Even Montgomery County's history points to a great future with its legacy of innovation and reinvention. Another example of hard work and determination.

EXECUTIVE SUMMARY

INSIGHTS:

Montgomery County is a comfortable and supportive place to live and do business. The location presents spectacular beauty and also commands resourcefulness and resilience. A strong work ethic permeates the community as people pursue a better quality of life, outdoor adventure, education, and small business development. Like farmers (some of the earlier settlers of this land), Montgomery County is hopeful and optimistic. It's in their nature. Having a vision and turning ideas into action and enterprises comes naturally here. And commitment and perseverance has provided much of Montgomery County's success and presents its greatest opportunity for growth. Montgomery County residents are strong just like the land they have set roots in. Qualities anyone would seek as they run a business or choose a neighbor. A community where a strong handshake reflects trust, honor, and commitment.

STRATEGIC BRAND PLATFORM

Strategic Brand Platform

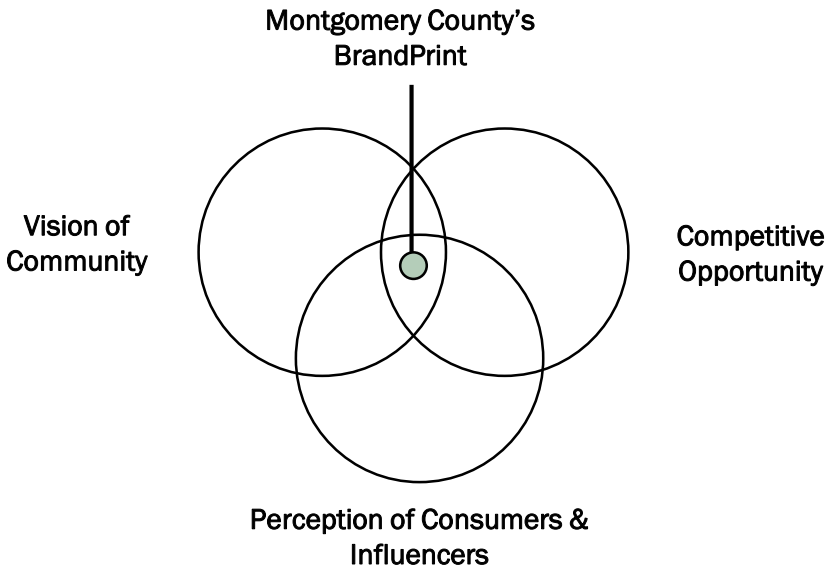
North Star funnels strategic insights for the brand into a single sentence, the brand platform. The brand platform is used as a filter for the formation of creative concepts and implementation initiatives. All communications, actions and product development should connect to the essence of this relevant and defining statement.

Target Audience:	*For people of strength (strong character, strong convictions, strong work ethic, strong will)*
Frame-of-Reference	*Montgomery County, New York, nestled in the natural beauty and abundant resources of the Mohawk Valley*
Point-of-Difference	*is a place where a history of determination and hard work welcome the future with a firm handshake*
Benefit	*providing you, your family and your business a home you can count on.*

UNDERSTANDING

Where the Brand Has Been and Why
This stage addresses the community's current brand positioning. We assess the environment; demographics and psychographics of residents; perceptions of visitors, residents, and stakeholders; current communications and the competition. Most importantly, we gather input from Montgomery County and its constituents.

We are looking for current attitudes regarding the brand. We are also trying to spot behavioral trends that exist around that brand. This stage is critical because it uncovers the relationship between three factors: the community's physical qualities, communication materials, and the position the community holds in the minds of its consumers.



IN-MARKET STUDY

Purpose

The purpose of the In-Market Study is to gain an understanding of the perceptions and attitudes of Montgomery County residents and stakeholders towards their community and to experience first-hand what makes it a unique destination for visitors, potential residents or business prospects.

Methodology & Results

The following summary reflects observations and input received during the North Star Destination Strategies In-Market visit from August 12-15, 2013. The information is not meant to be all-inclusive, but rather highlight the most common themes experienced on the trip. This includes an area familiarization (FAM) tour, stakeholder focus groups, stakeholder one-on-one interviews and local community one-on-one perception interviews.

MATERIALS REVIEWED

Materials Reviewed

This is a sampling of the materials reviewed as part of the Research and Materials Audit, prior to the In-Market Study.

Economic Development

- Real Estate Options, Incentive Programs and Services produced by the Montgomery County Business Development Center print off (2013)
- Montgomery County Business Development Center Annual Report booklet (2012)
- Montgomery County Business Development Center folder
  - "Your Gateway to Success" newspaper
  - Information sheet print off
  - Business card for Kenneth F. Rose, CEO/Director
  - Print offs information about businesses
    - ❑ Hill & Markes Inc.
    - ❑ M.H. Stallman Co.
    - ❑ Richardson Brands Company
    - ❑ Carolina Clubs, Inc.
    - ❑ DAIM Logistics, Inc.
    - ❑ Fulton-Montgomery Community College
    - ❑ HERO/Beech-Nut

Fulton-Montgomery Regional Chamber of Commerce

- Montgomery County Street Map & Resource Guide brochure
- Email print off of Chamber Weekly News
- Livability magazine for Fulton-Montgomery Region (2013, 2012)
- NewsLine booklet (2013)
- Membership Application print off
- Health Insurance Enrollment and Billing Guidelines print off(2013)
- Chamber Check Gift Certificate Program print off
- New Membership Information brochure
- "Chamber Checks" envelope/brochure
- Payment Authorization form print off (2013)

MATERIALS REVIEWED

Materials Reviewed

This is a sampling of the materials reviewed as part of the Research and Materials Audit, prior to the In-Market Study.

Outdoor Recreation

- Fulton-Montgomery Counties Snowmobile Trails Map
- Cycling the Hudson Valley brochure (2013)
- Cycling flyer (2013)
- Harvest Tour map
- Simply Getaway magazine

Local Attraction Brochures

- The Kateri Shrine; Fonda, NY
- Adirondack Kayak Warehouse; Amsterdam, NY
- Stone Arabia Stone Church; Palatine Bridge, NY
- The Land Arboretum
- The Story of Old Fort Johnson
- Mowhawk Hudson Land Conservancy
- Amsterdam Waterfront Foundation presents Riverlink Summer Concert Series (2013)
- Montgomery County Department of History & Archives
- Windfall Barn
- Fort Plain: At the Crossroads of History
- St. Johnsville, NY information booklet published by the Chamber of Commerce
- Mowhawk Valley Museums
- Schoharie River Center
- Shrine of Our Lady Martyrs (2012)
- Schoharie Crossing: State Historic Site
- The Arkell Museum at Canajoharie
- Historic City Hall; Amsterdam, NY
- The Arkell Museum at Canajoharie Calendar (Spring/Summer 2013)
- Lodging
  - Super 8 Motel; Amsterdam, NY
  - Valley View Motor Inn; Amsterdam, NY
  - Amsterdam Castle Bed & Breakfast
  - Stone Rose Bed and Breakfast (A Country House)

MATERIALS REVIEWED

Materials Reviewed

This is a sampling of the materials reviewed as part of the Research and Materials Audit, prior to the In-Market Study.

Miscellaneous

- Print off sheet of the contents of the CD
- Tn Florida Comprehensive Plan Review (1996)
- Mont Co Ag Plan (1999)
- Tn Amst Comp Plan Complete (2004)
- Florida Comp Plan Chapter 6 Socioeconomics (2010)
- Florida CP Amendment Ch 1 DRAFT (2010)
- Florida CP Amendment Ch 8 DRAFT (2010)
- Cityamst Comp Plan (2004)
- Draft Town Florida Cp Amend (2010)
- Florida Land Use Map (2010)
- Mid Mont Co LWRP (2009)
- Minden Comp Plan (2012)
- Mohawk Valley Sustainability Plan
- MVREDC Strategic Plan Final (2011)
- MW Poster 2
- Via Ponte Master Plan March (2004)
- Western Mont Co
- Excerpt by Kelly Yacobucci Farquhar about Montgomery County's History (2004)
- Committee Organization Chart for Montgomery County (2012)
- Montgomery County Educational and Cultural Council on the Arts booklet
- MGVO Economic Impact
- "Our Town: Amsterdam" video

IN-MARKET STUDY

Most Mentioned Assets

- Transportation links (Thruway, Rail and Amtrak Access)
- Farming and agriculture assets
- Incredible natural beauty
- Distinct culture; nothing suburban here!
- Mohawk River
- History (Native American; Revolutionary War; Erie Canal)
- Proximity to Boston, Montreal and NYC - middle
- Shuttleworth Park - Amsterdam Mohawks
- Erie Canal history
- Arkell Museum (Art Museum)
- Kateri Shrine
- Shrine of Martyrs
- River links park in Amsterdam
- History of manufacturing Innovation –
    - Coleco; gloves; rugs; mills; Beechnut
- Four seasons, outdoor recreation

IN-MARKET STUDY

Most Mentioned Challenges

- Varying agenda on what “progress” looks like
- Lack of funding for tourism and arts
- Political infighting/Territorial
- No cohesive image - rural or old mill town?
- Diversity concentrated to Amsterdam
- Lack of hotels (no business class)
- Downtown "mall" area in Amsterdam
- Not much to do
- Negativity/bad attitudes
- See Amsterdam as blighted, poor, depressed
- "Good old days are gone" mentality
- People have pride of place, but not in county
- Perception that schools are not as good as neighboring areas (Fonda, Fultonville, Perth)

IN-MARKET STUDY

Most Mentioned Opportunities

- New political structure and leadership
- Relationship with Fulton County
- Mohawk River
  - Riverlinks Park
  - Potential for riverfront development
  - River and river culture
- Shuttleworth Park – Amsterdam Mohawks
- Agritourism and Amish
- Collaboration between tourism entities
- Economic Development (cheap land, location, wages)
- Outdoor recreation
- Have a “prove them wrong” attitude
- History of innovation – we’ve done it before; what’s next?
- Diversity of county
- Revolutionary War Connections
- Mohawk collective and rehab of Canajoharie

BRAND BAROMETER

Purpose

The Community Brand Barometer measures strength of the Montgomery County brand according to:

- Resident satisfaction with and advocacy for Montgomery County as a place to live, visit, and conduct business
- Montgomery County satisfaction/advocacy relative to the nation

Methodology & Results

Significant research* on a wide variety of customer satisfaction metrics found a single powerful question has the greatest ability both to measure current resident satisfaction and predict future community growth. That question, "Would you recommend your city to a friend or colleague as a place to live (or work or visit)?" is powerful because it surpasses the basic model of economic exchange, where money is spent for products or services. People who score their community high on the Brand Barometer actively recruit new residents, visitors, and businesses through positive word-of-mouth marketing. It is very personal. By making a strong recommendation, they are willing to risk their own character, trustworthiness and overall reputation for no tangible reward.

The methodology for the Brand Barometer has been carefully developed and determined to be statistically significant. Participants in the community-wide surveys answered three questions:

- Would you recommend living in Montgomery County to a friend or colleague?
- Would you recommend visiting Montgomery County to a friend or colleague?
- Would you recommend conducting business in Montgomery County to a friend or colleague?

**Research conducted by Satmetrix Systems, Inc., Bain & Company and Fred Reichheld, author of "The One Number You Need to Grow,"* Harvard Business Review *(Dec. 2003).*

BRAND BAROMETER

Methodology & Results

Responses are measured on a 10-point scale with 1 being "Not at all likely" and 10 being "Extremely likely." Results are presented on an individual respondent level as well as an aggregate Brand Advocacy Score. Scores are calculated with response percentages in the following categories:

- Promoters (9 or 10) – Loyal residents who will continue fueling your growth and promoting your brand.
- Passives (7 or 8) – Satisfied but unenthusiastic residents who are vulnerable to other opinions and brands.
- Detractors (1-6) – Unhappy residents who can damage your brand and impede growth through negative referrals.

Brand Advocacy Score = % Promoters – % Detractors

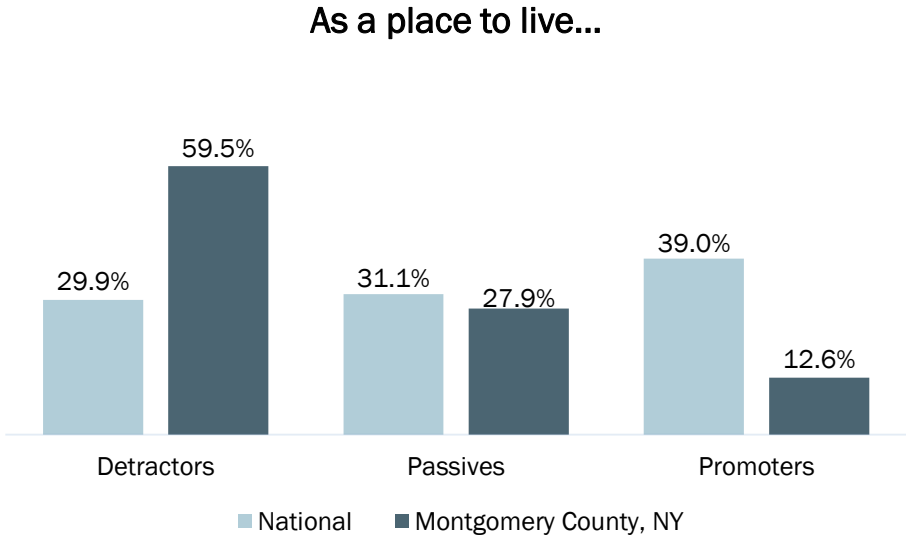
Montgomery County's Brand Advocacy Score can then be compared to a benchmark score that has been derived for the entire nation. North Star employs multiple survey methods through proprietary sources to determine national averages. Scores represent a stratified random sample of the entire U.S. population and are updated on a regular basis. You can use this information to track your own brand performance relative to national trends over time. In addition, you can repeat the Community Brand Barometer after a designated period and compare the results to your own benchmark score for an on-going metric of how community attitudes change over time and in response to specific events or activities.

Community

Brand Barometer

On a scale of 1 to 10 with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend **living** in Montgomery County to a friend or colleague?

Living in Montgomery County, NY		
1	11.05%	Detractors
2	7.37%	
3	14.21%	
4	7.37%	**59.47%**
5	11.58%	
6	7.89%	
7	14.2%	Passives
8	13.7%	**27.89%**
9	5.79%	Promoters
10	6.84%	**12.63%**



Observations:

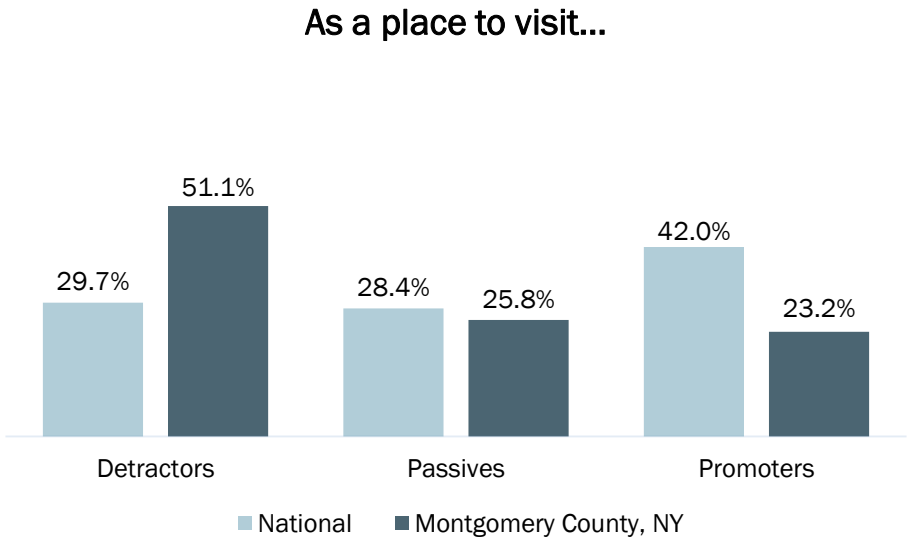
- With only 12% Promoters, Montgomery County will struggle to generate positive word of mouth promotion.
- Montgomery County suffers from a vocal two-third who are detractors. Education and engagement ,ust be a priority in brand implementation.

Community

Brand Barometer

On a scale of 1 to 10 with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend **visiting** Montgomery County to a friend or colleague?

Visiting Montgomery County, NY		
1	6.32%	Detractors
2	5.79%	
3	9.47%	
4	8.42%	51.05%
5	11.58%	
6	9.47%	
7	11.6%	Passives
8	14.2%	**25.79%**
9	6.8%	Promoters
10	16.3%	**23.2%**



Observations:

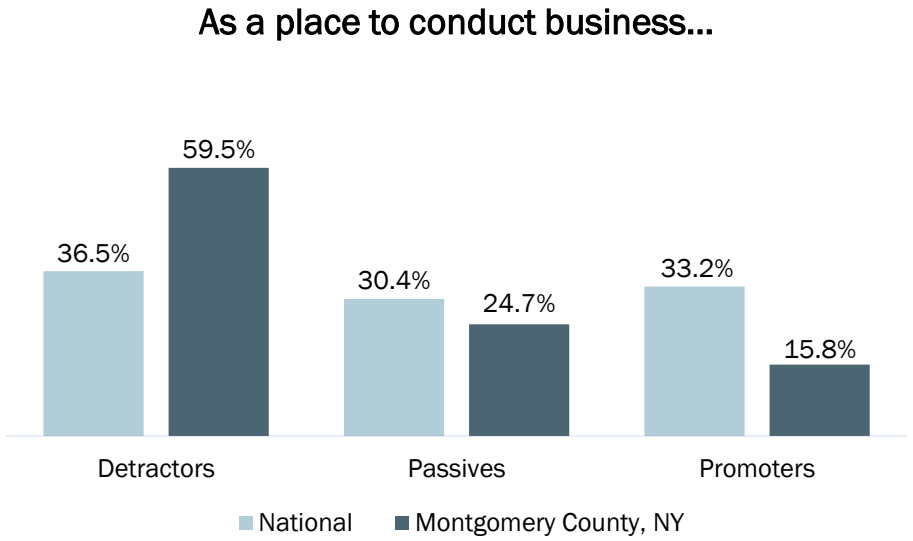
- Again more than half of Montgomery County residents are Detractors when considering it as a place to visit.
- The quarter of people who are Promoters should be engaged to reach their friends and neighbors. This is often the first step in advocacy awareness.

Community

Brand Barometer

On a scale of 1 to 10 with 1 being "not at all likely" and 10 being "extremely likely," how likely would you be to recommend **conducting business** in Montgomery County to a friend or colleague?

Conducting Business in Montgomery County, NY		
1	10.00%	Detractors
2	7.37%	
3	10.53%	
4	7.89%	**59.47%**
5	14.74%	
6	8.95%	
7	14.7%	Passives
8	10.0%	**24.74%**
9	6.3%	Promoters
10	9.5%	**15.8%**



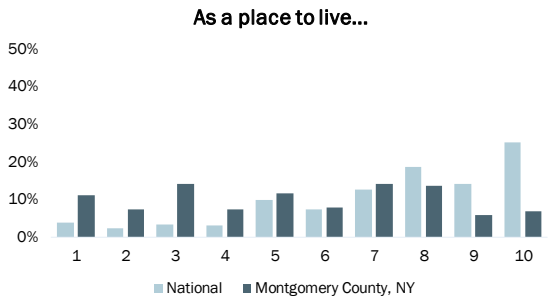
Observations:

- The Conducting Business category is often affected by pessimism towards the national economy. Also, this is not a direct statement about the County's ability to attract business, but more likely speaking of the struggles a business might face in the County.
- The small group of promoters need to turn up the volume and frequency. Cleary there are compelling stories to be told. They are just not reaching audiences in a compelling way or preferred format. Careful attention must be paid.

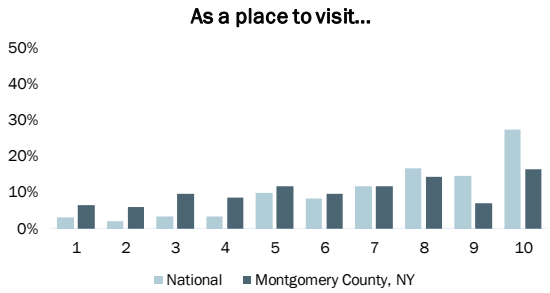
COMPARISON RESULTS | BY NUMBERED RESPONSE

The charts to the right allow comparison of numbered responses between Montgomery County residents and the national sample in each of the categories tested (living, visiting and conducting business). They illustrate how many respondents selected each individual number as their response choice. For example, 2.4% of all respondents in the national sample selected “2” when recommending their community as a place to live - *on a scale of 1 to 10 with 1 being "not at all likely" and 10 being "extremely likely."*

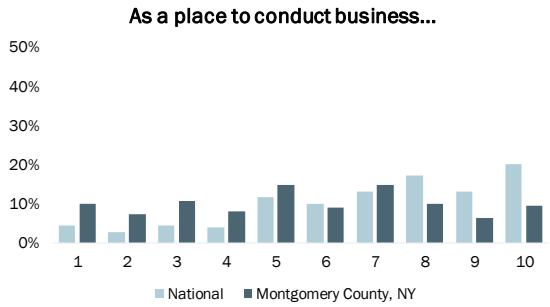
Living in Your City		
	National	Montgomery County, NY
1	3.9%	11.1%
2	2.4%	7.4%
3	3.4%	14.2%
4	3.1%	7.4%
5	9.7%	11.6%
6	7.4%	7.9%
7	12.6%	14.2%
8	18.6%	13.7%
9	14.0%	5.8%
10	25.0%	6.8%



Visiting Your City		
	National	Montgomery County, NY
1	3.0%	6.3%
2	2.1%	5.8%
3	3.2%	9.5%
4	3.3%	8.4%
5	9.9%	11.6%
6	8.3%	9.5%
7	11.7%	11.6%
8	16.7%	14.2%
9	14.6%	6.8%
10	27.3%	16.3%



Conducting Business in Your City		
	National	Montgomery County, NY
1	4.3%	10.0%
2	2.7%	7.4%
3	4.4%	10.5%
4	3.8%	7.9%
5	11.5%	14.7%
6	9.9%	8.9%
7	13.1%	14.7%
8	17.2%	10.0%
9	13.0%	6.3%
10	20.1%	9.5%

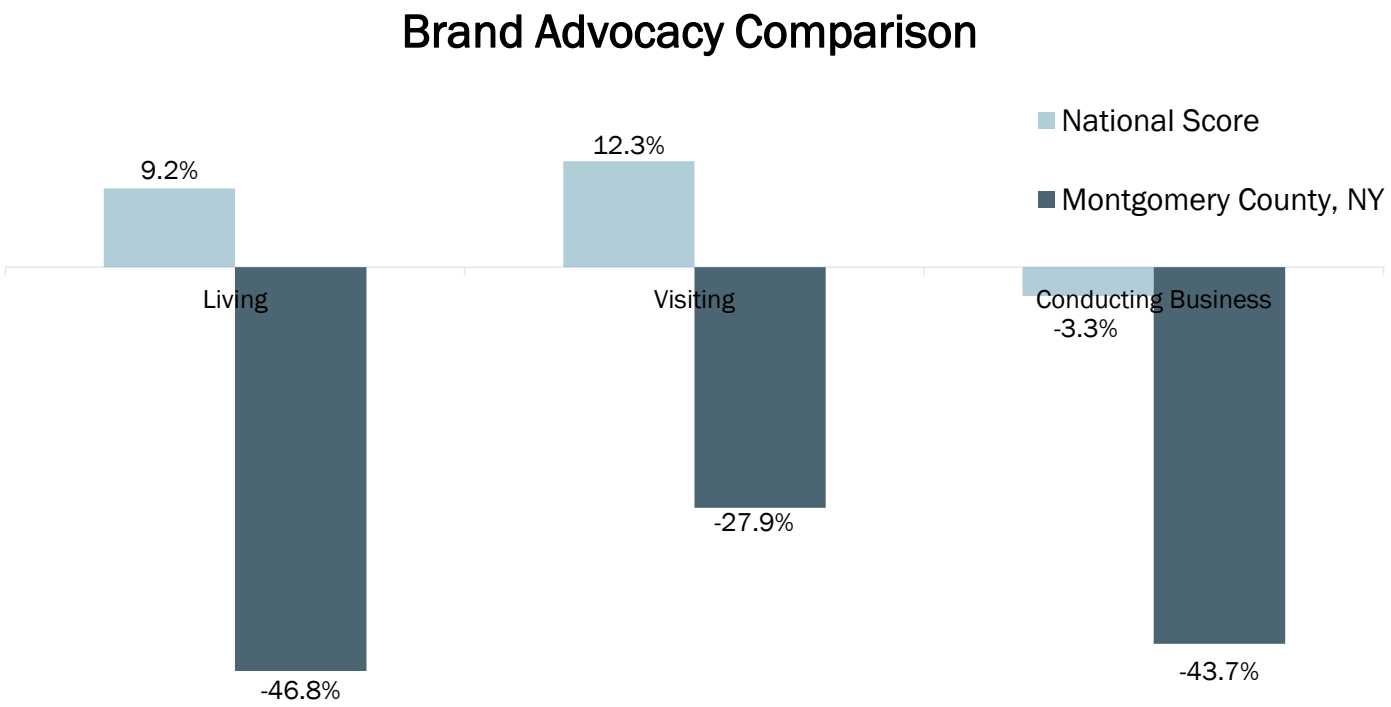


Community

Brand Barometer

Brand Advocacy Score = % Promoters – % Detractors

When removing the Passives category, Montgomery County underperforms the national average as a place to live, visit, and conduct business.



VISION SURVEY

Purpose

Part of the Understanding stage includes collecting stakeholder perceptions of Montgomery County. What do they like and dislike about their community? How would they make it better? What kind of things do they associate with Montgomery County? After all, no one knows Montgomery County better than those who form its backbone.

Methodology & Results

To understand stakeholder perceptions, a Vision Survey was emailed to key stakeholders in the community identified by the brand drivers. All questions were open-ended, allowing for a qualitative measure of stakeholder perceptions. Many of the questions in the survey focused on Montgomery County's direct strengths, weaknesses, opportunities and threats. Other questions focused on brand perception, allowing the respondent to translate the intangible elements of a brand into a tangible noun.

80 stakeholders responded to the survey. The top answers most reflective of all stakeholders are shown below.

See Appendix A on the Report CD for the complete Vision Survey results.

Community Leader Perceptions

DESCRIBE MONTGOMERY COUNTY

When you first think of the following, what three words first come to mind?

- Montgomery County
  - Mohawk River
  - Rural
  - Historic
- City of Amsterdam
  - Crime
  - Run down
  - Old
- Town of Amsterdam
  - Shopping
  - Business
  - Rural
- Town of Canajoharie
  - Beechnut
  - Arkell Museum
  - Amish
- Town of Charleston
  - Rural
  - Farms
  - Nice
- Town of Florida
  - Agriculture
  - Farms
  - Scenic

Community Leader Perceptions

DESCRIBE MONTGOMERY COUNTY

When you first think of the following, what three words first come to mind?

- Town of Glen
  - Farming
  - Amish
  - Quaint
- Town of Minden
  - Farms
  - Amish
  - Historic
- Town of Mohawk
  - Fonda
  - Farming
  - River
- Town of Palatine
  - Amish
  - Rural
  - History
- Town of Root
  - Rural
  - Farming
  - Country
- Town of St. Johnsville
  - Farming
  - Small town
  - Poor

Community Leader Perceptions

DESCRIBE MONTGOMERY COUNTY

How would outsiders (residents in other parts of New York) describe Montgomery County and its communities?

- Rural
- Beautiful
- Poor
- Boring

If you were in charge and could broadcast one message about Montgomery County, what would it be?

- *"Can't do it. The towns and villages all have unique characteristics – trying to figure out one unified message to cover them all would accomplish nothing."*
- *"It's an excellent place to work and live, and offers many opportunities for individuals and families needing assistance in achieving self-sufficiency."*
- *"Our communities are tight-knit and offer a great quality of life and great places to raise a family. Homes are affordable and we're close to Albany, Saratoga, Lakes, and major cities."*

Community Leader Perceptions

DESCRIBE MONTGOMERY COUNTY

What are Montgomery County's three greatest assets?

- Its ideal, central location
- Mohawk River
- The community's rich history
- Natural beauty of the area

What is Montgomery County's best kept secret?

- The historical assets
- Its location
- The land and natural assets

Community Leader Perceptions

DESCRIBE MONTGOMERY COUNTY

What in or about Montgomery County attracts most… ?

- **Residents**
  - Affordability
  - Location
  - Small town living
- **Visitors**
  - Historical significance
  - Outdoor recreation and assets
  - Natural beauty
- **Businesses**
  - Location
  - Available labor force
  - Affordability

Community Leader Perceptions

IMPROVING MONTGOMERY COUNTY

If you could change one thing (add, remove, or change something) about Montgomery County that would make a positive difference for its future, what would it be?

- Political differences
  - *"Better working relationship among the municipalities."*
  - *"Change the attitude of the government."*
- Resident attitude adjustments
  - *"Change the bad attitude and longing for the past."*
  - *"We have to believe in our own potential before others will."*
- Aesthetic improvements
  - *"I would take all the old buildings that are dilapidated and tear them down or restore them."*
  - *"Create well designed housing developments that incorporate trees and landscaped designs."*

Community Leader Perceptions

DESCRIBE MONTGOMERY COUNTY

In your opinion, if Montgomery County could make one investment to spur economic growth, what would that investment be?

- Encourage economic development and job growth
  - *"Attract large industry to attract jobs and boost the economy."*
  - *"Invest in becoming more attractive to entrepreneurs, especially those in the technology and IT fields."*
- Improve the school system
  - *"Education of its residents. Businesses want a labor market that can meet the demands of the 21st century."*
  - *"Improve the schools. Then more families might be interested in moving here, which might mean more investment in the community."*
- Utilize the river
  - *"Development of the riverfront in Amsterdam."*

Community Leader Perceptions

IMPROVING MONTGOMERY COUNTY

What business/industry is best suited for Montgomery County? Why?

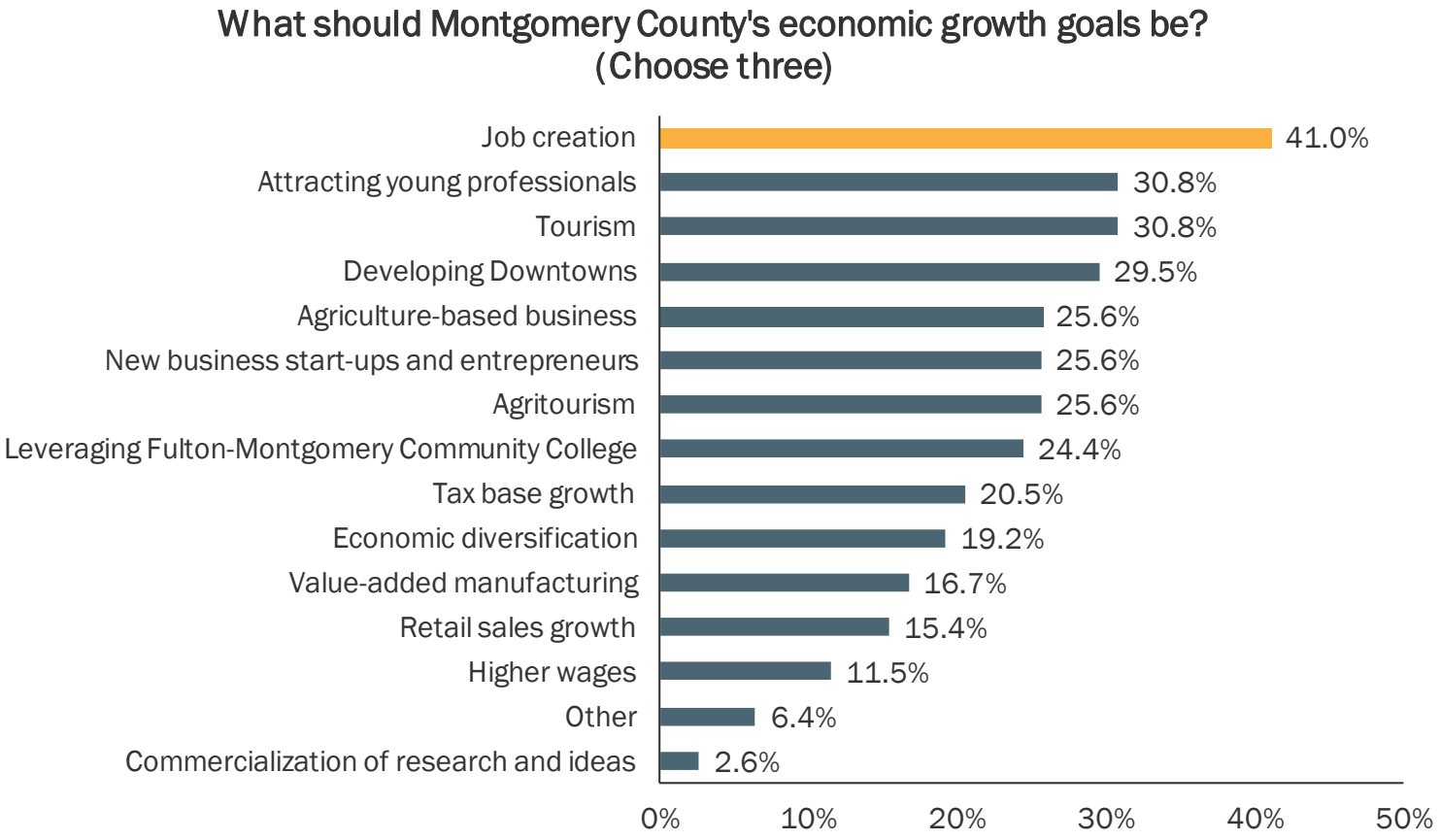
- Agriculture
- Distribution
- Manufacturing

What are the biggest challenges currently facing Montgomery County?

- Poverty and the job market
  - *"People are very poor and many do not have transportation to seek transportation outside of the county. They are forced to stay on welfare as they have no way to seek employment outside the county, and there isn't enough industry to employ them all here."*
- High taxes
- Negative attitudes
  - *"Attitudes have us behind the curve. Moving forward in a positive direction is made more difficult by the number of times one is forced to dodge yet another stick in the mud."*

Community Leader Perceptions

IMPROVING MONTGOMERY COUNTY

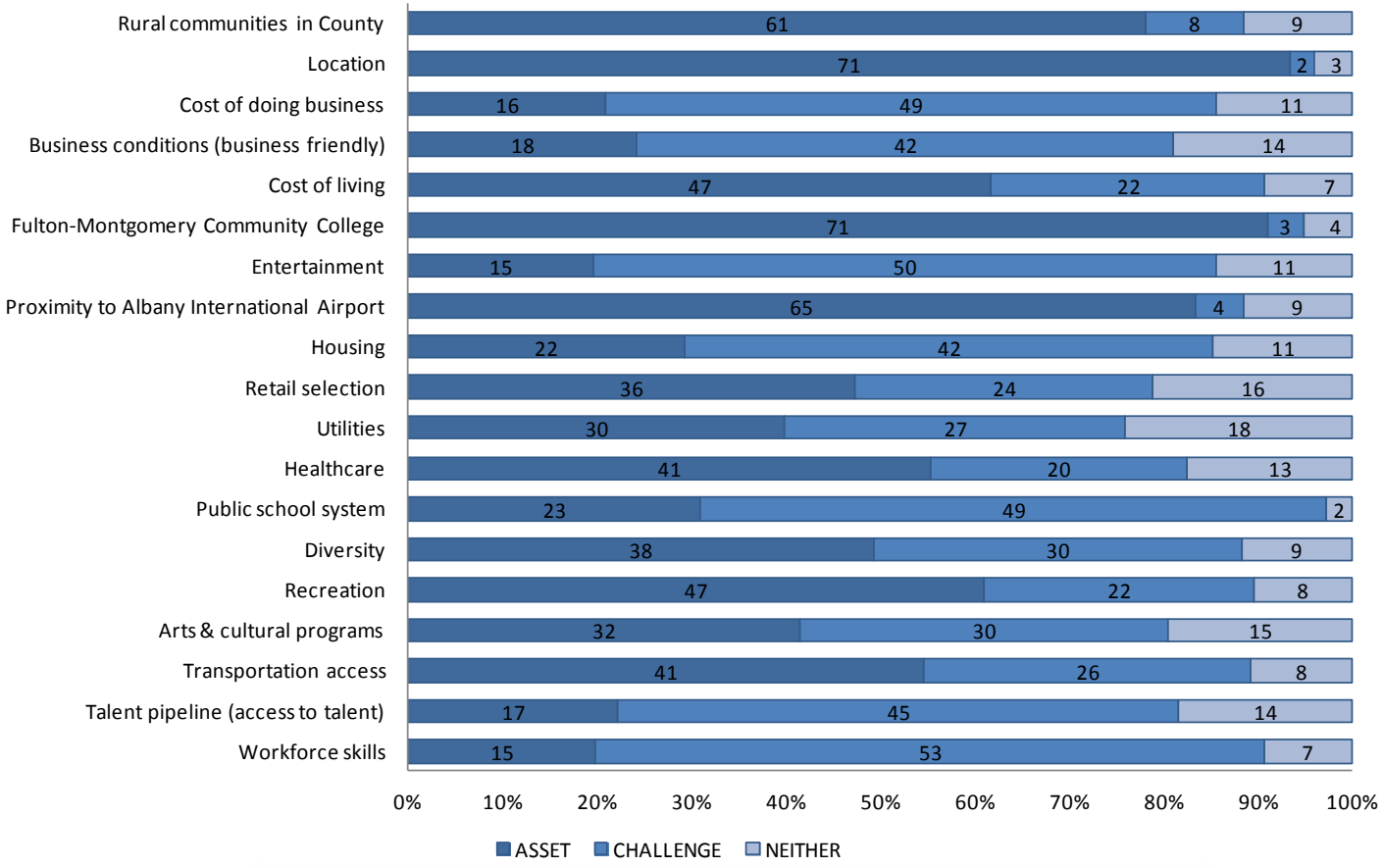


Other: Attracting second home buyers, invest in public schools

Community Leader Perceptions

IMPROVING MONTGOMERY COUNTY

Rate the following as an ASSET supporting economic growth, CHALLENGE hindering economic growth, or NEITHER.



Community Leader Perceptions

DEFINING MONTGOMERY COUNTY

What surprises people about Montgomery County?

- Its natural beauty
  - *"It's so scenic and beautiful."*
- Its location
  - *"The fact that we're located so close to the larger capital region and New York City."*
  - *"It's close to everything! The Capital District, Utica/Syracuse, Saratoga, Adirondacks."*

In your opinion, what is most important to Montgomery County's identity?

- History
  - *"Its historical importance to the development of our entire country."*
- Agriculture
- Mohawk River
  - *"Mohawk River recreation."*

Community Leader Perceptions

COMPETITOR COMMUNITIES

What is the first adjective that comes to mind when describing the following areas?

- **Central New York**
  - Rural
  - Beautiful
  - Depressed
- **Capital District**
  - Government
  - Technology
  - Busy
- **Schenectady**
  - Crime
  - Revitalized
  - Poor
  - Changing
- **Fulton County**
  - Poor
  - Lakes
  - Rural
- **Saratoga**
  - Horse racing
  - Vibrant
  - Fun
- **Schenectady County**
  - Suburban
  - I don't know
  - Growing
- **Herkimer County**
  - Rural
  - I don't know
  - Poor

Community Leader Perceptions

DEFINING MONTGOMERY COUNTY

What does Montgomery County add to the Capital District?

- Affordable housing
- An easy commute
- Bedroom community

What does Montgomery County add to the Mohawk Valley?

- Historical significance
  - *"A county rich with history."*
- Proximity to everything
  - *"A doorway to the Capital District."*
- Beauty

Community Leader Perceptions

DEFINING MONTGOMERY COUNTY

In your opinion, what will attract more young people to Montgomery County?

- Amiable job market
- More entertainment amenities
- Affordable housing

What unites Montgomery County?

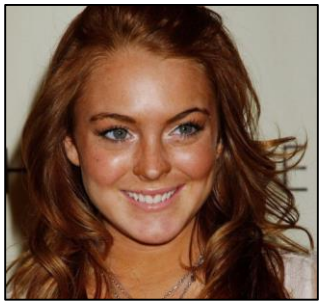
- Community pride
  - *"Whether in a time of disaster, death, or fundraising, the communities always come together to help when or wherever needed."*
- Nothing; we are not united
  - *"Who told you we're united?"*
- The river

Community Leader Perceptions

PERSONIFICATION OF MONTGOMERY COUNTY

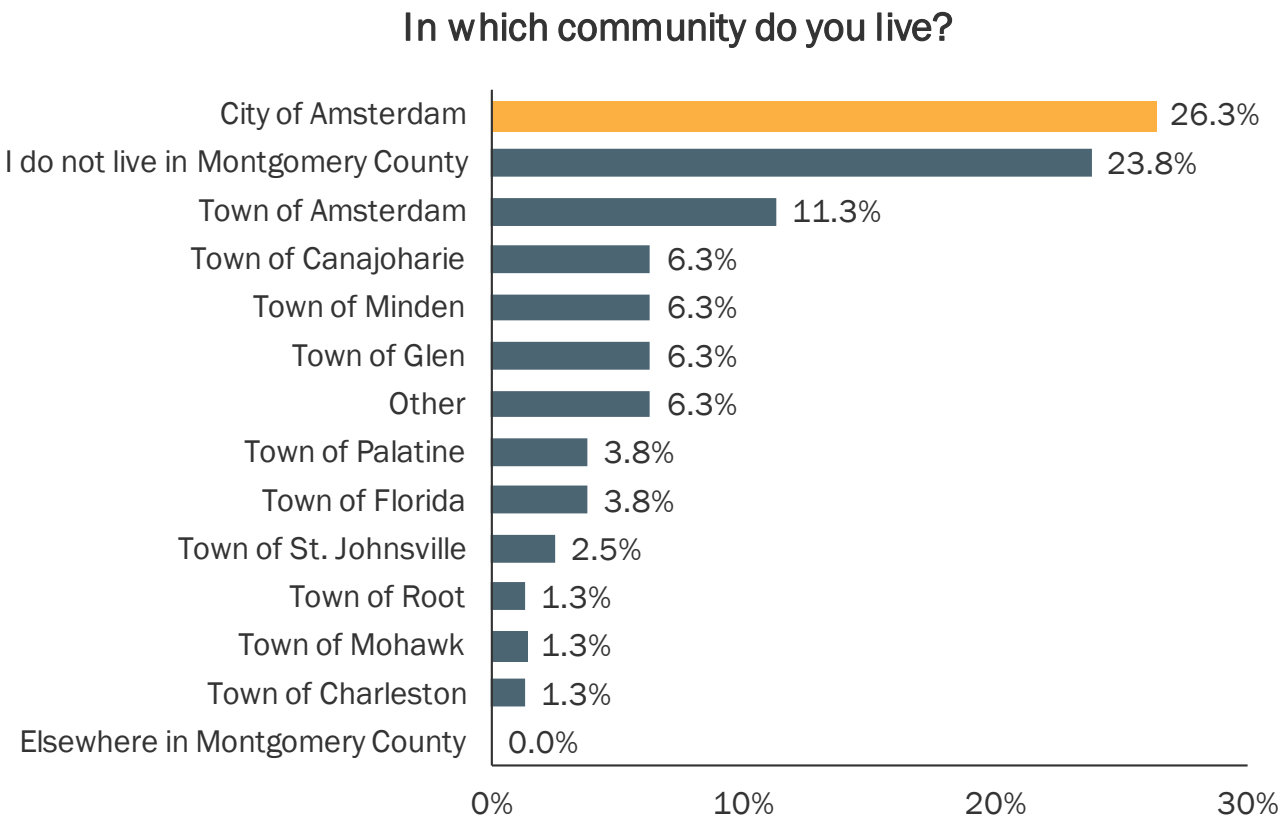
If Montgomery County were a famous person, who would it be? Why?

- Kirk Douglas
  - *"Although he came from poverty, he became a legendary actor who has now faded from the limelight because of physical deterioration due to age."*
- John Wayne
  - *"Because we have grit. We have a backbone of people who want to help us become a desirable place to be. We have people invested in making our community better."*
- Lindsay Lohan
  - *"Has a lot of potential but has gone down the wrong path and attracts the wrong type of people. Will self destruct if someone doesn't do an intervention. Soon."*



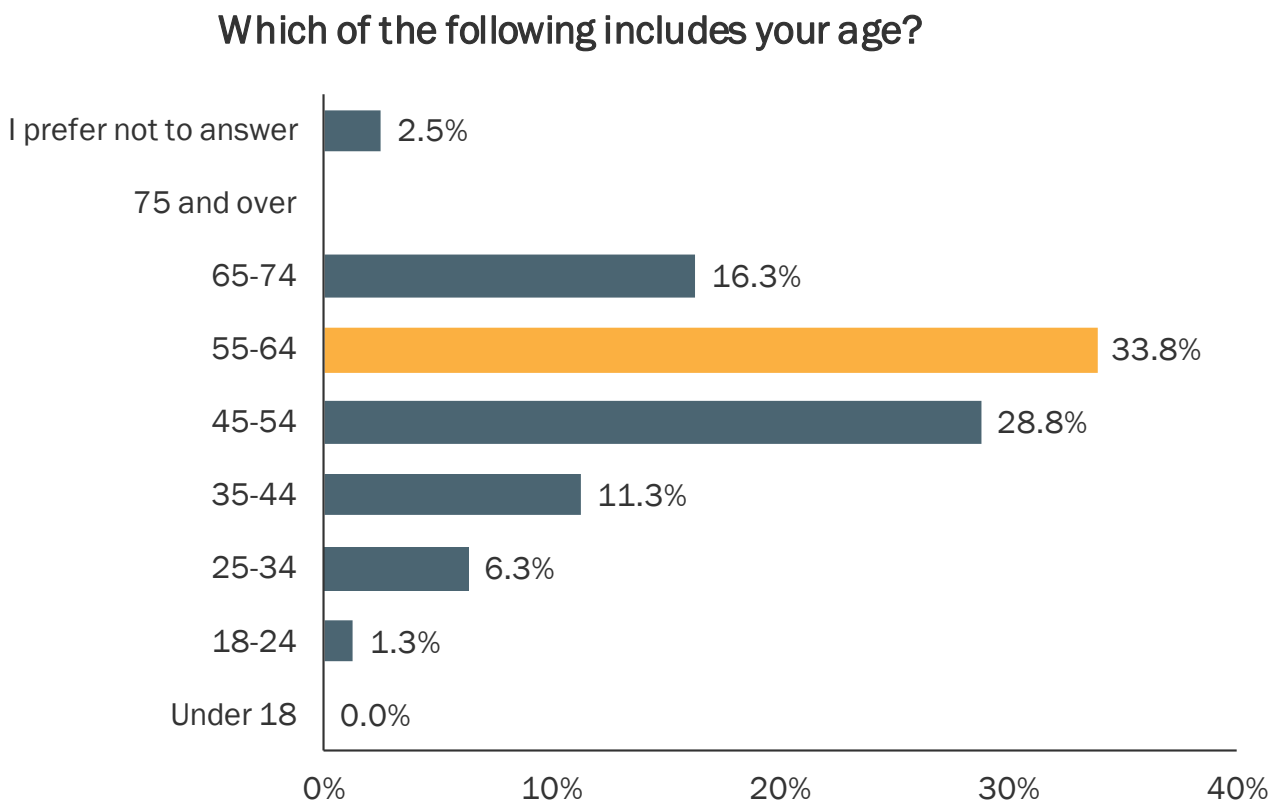
Community Leader Perceptions

DEMOGRAPHICS



Community Leader Perceptions

DEMOGRAPHICS



ONLINE COMMUNITY-WIDE SURVEY

Purpose

The purpose of the Online Community-wide Survey is to gain a quantitative measure of the community's perceptions of Montgomery County.

Methodology & Results

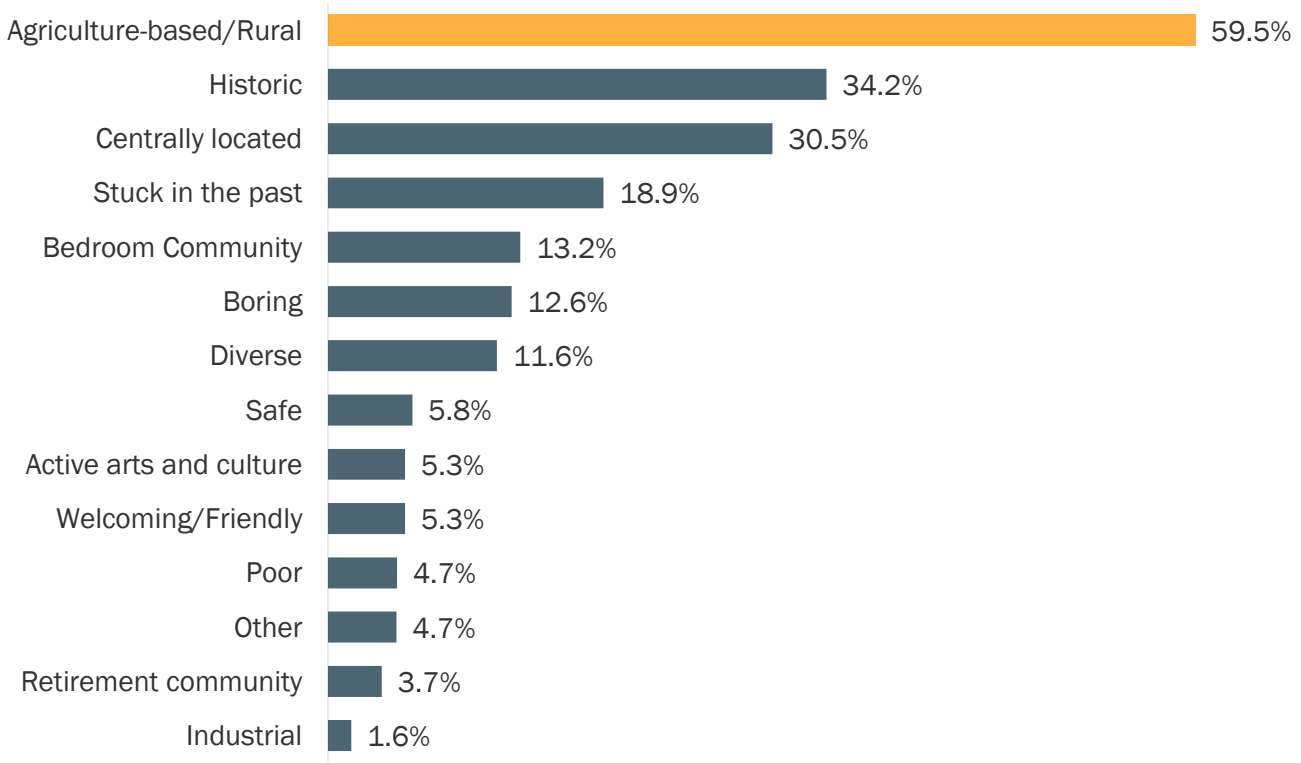
North Star developed an online survey based on the results of the qualitative Stakeholder Vision Survey and In-Market conversations. All questions were multiple choice, allowing for a quantitative measure of resident perceptions. Community members were encouraged to participate after the survey was posted on city websites and publicized in local media.

191 survey responses were collected for this survey.

The graphs on the following pages highlight responses for each question on the corresponding survey, allowing side-by-side comparison of results. Please refer to the Report CD and Appendix B for a detailed list of all "Other" responses.

Resident Perceptions

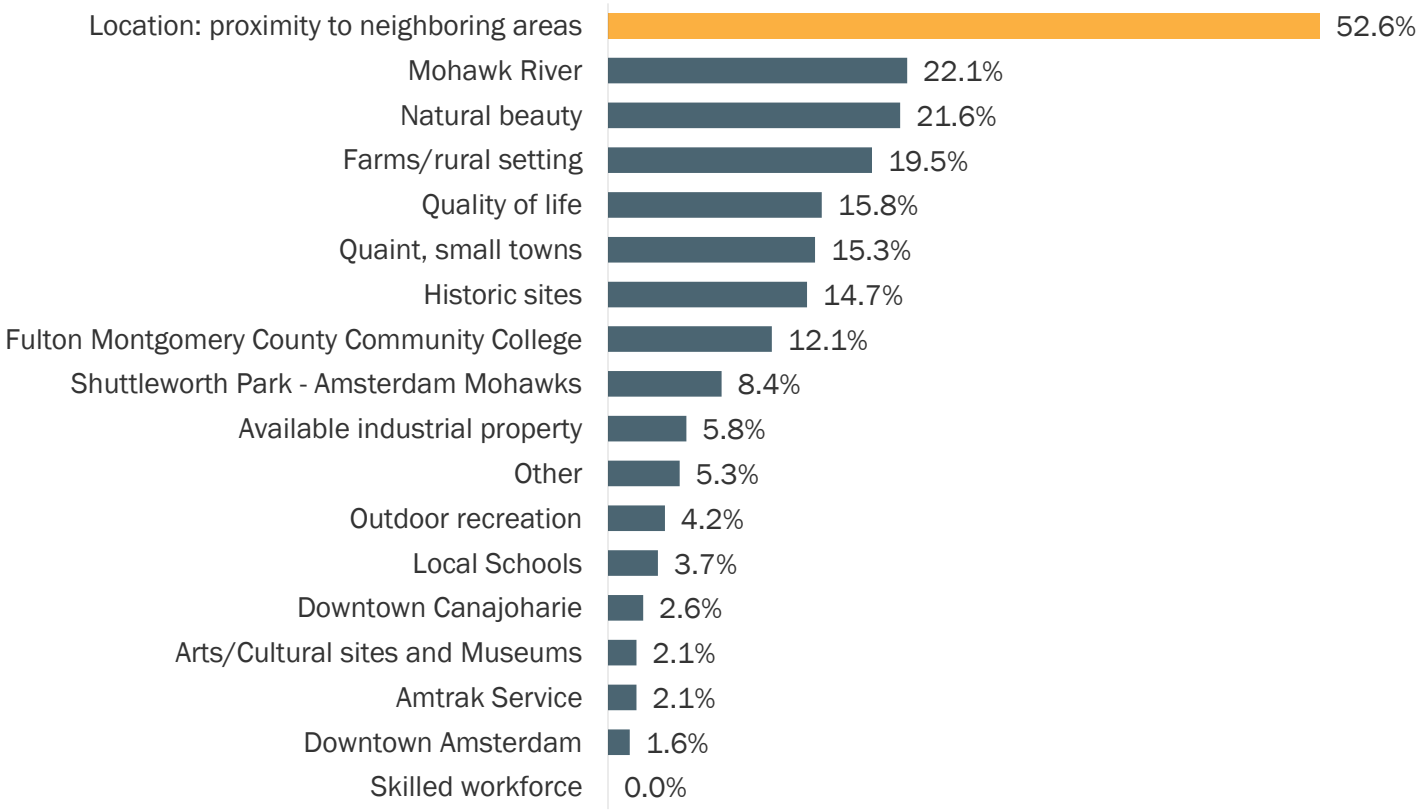
How would you best describe Montgomery County today? Choose two.



Other: Declining, poor, unfriendly

Resident Perceptions

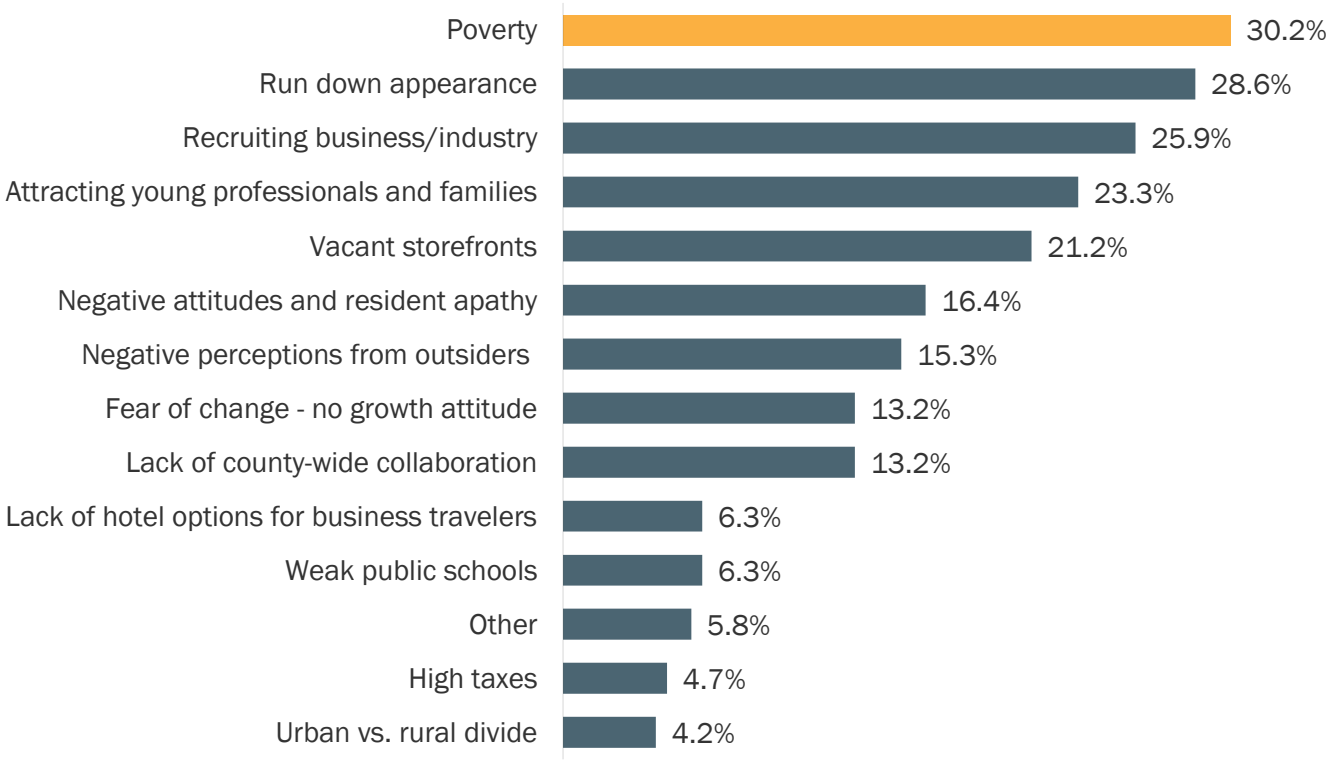
What is Montgomery County's greatest asset? Choose two.



Other: Potential for growth, Fonda fairgrounds, Amish attractions

Resident Perceptions

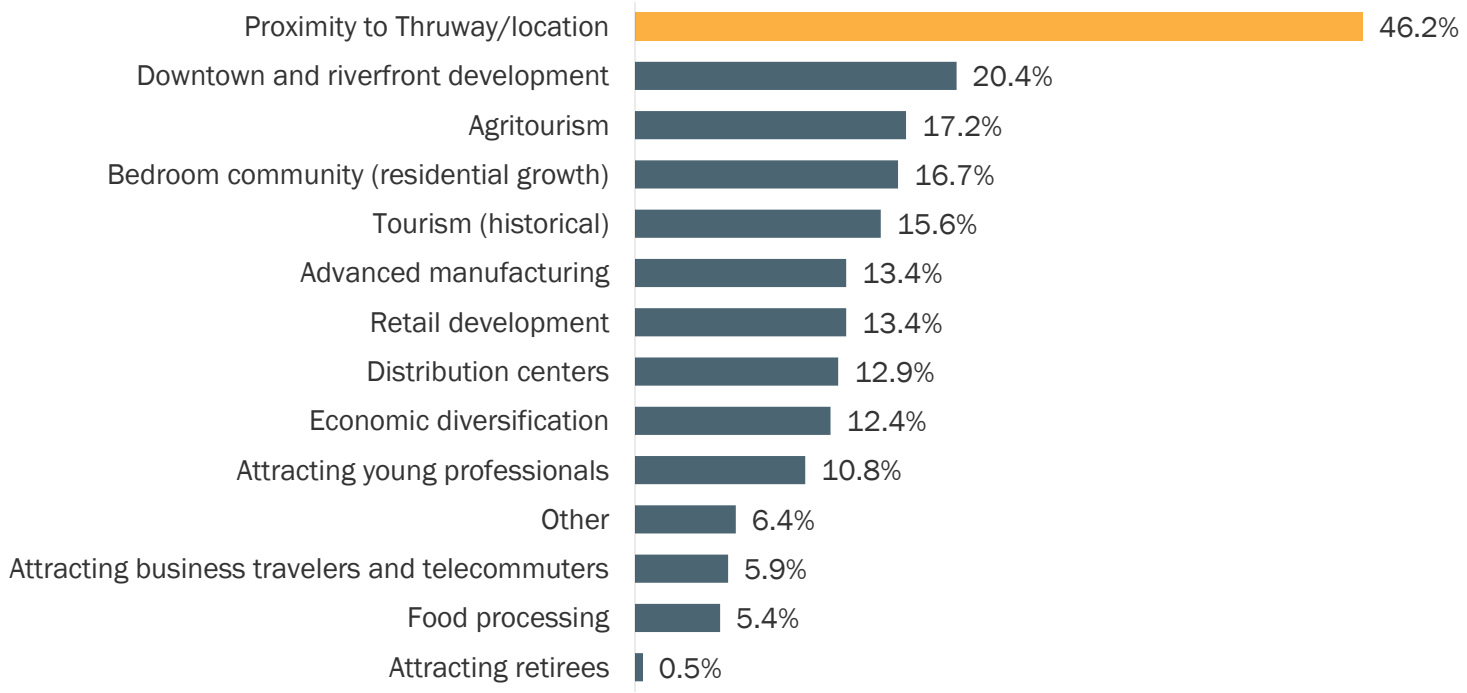
The greatest challenges currently facing Montgomery County are… Choose two.



Other: High taxes, crime

Resident Perceptions

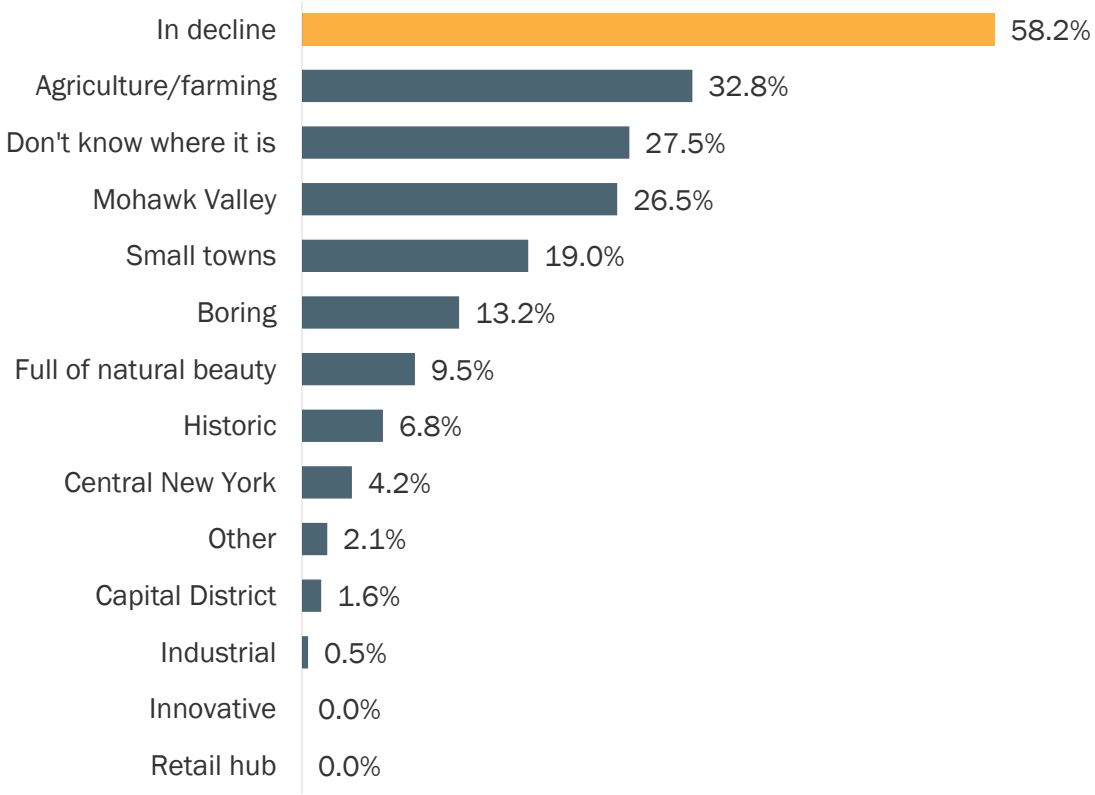
The greatest opportunities for growth in Montgomery County are… Choose two.



Other: Agriculture, lower taxes

Resident Perceptions

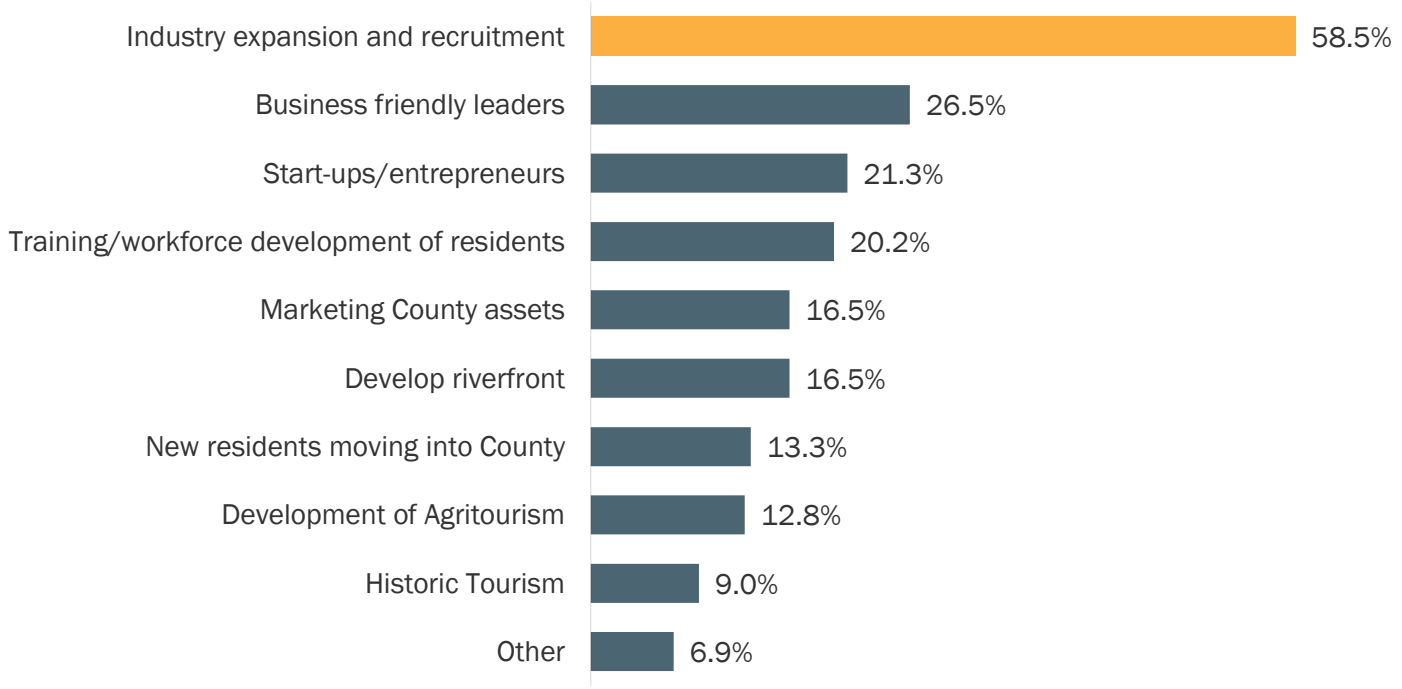
Most outsiders describe Montgomery County as… Choose two.



Other: Troubled, welfare County

Resident Perceptions

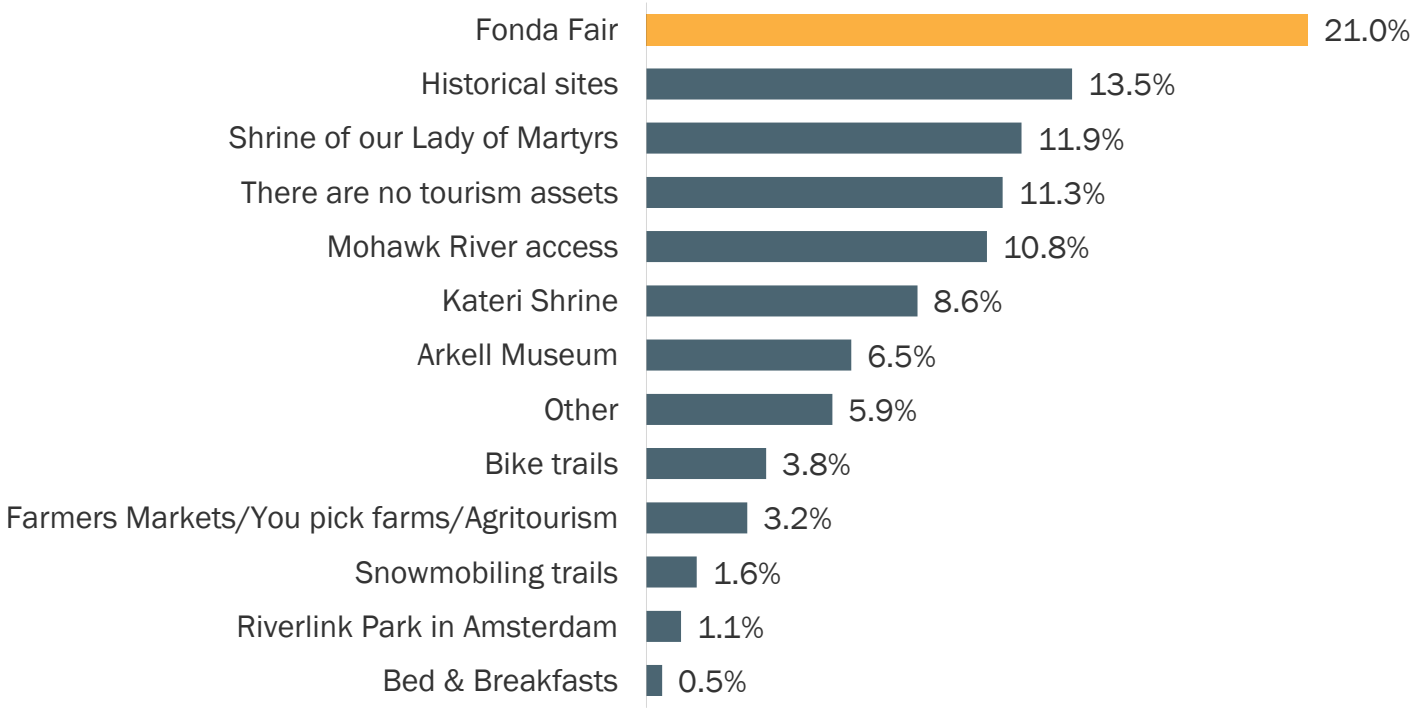
In your opinion, which of the following would create the most jobs for Montgomery County? Chose two.



Other: Lowering taxes, utilizing the freeway

Resident Perceptions

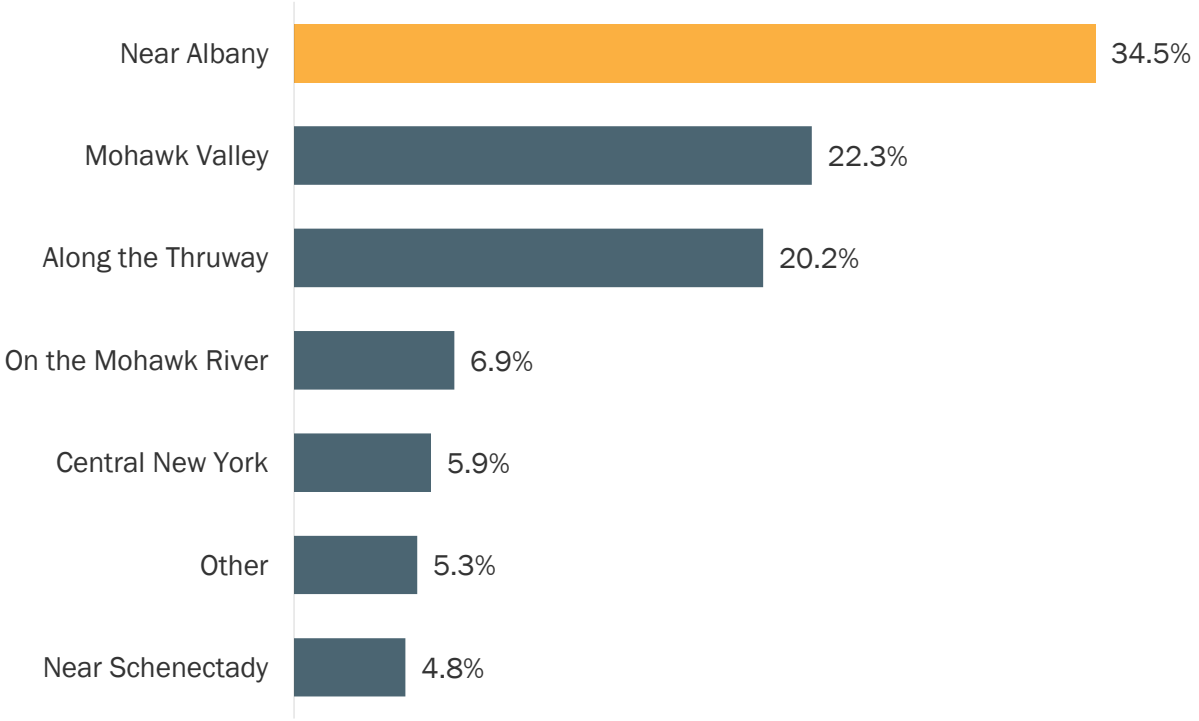
In your opinion, what tourism asset attracts the most people from outside Montgomery County to visit?



Other: Shuttleworth Park, location

Resident Perceptions

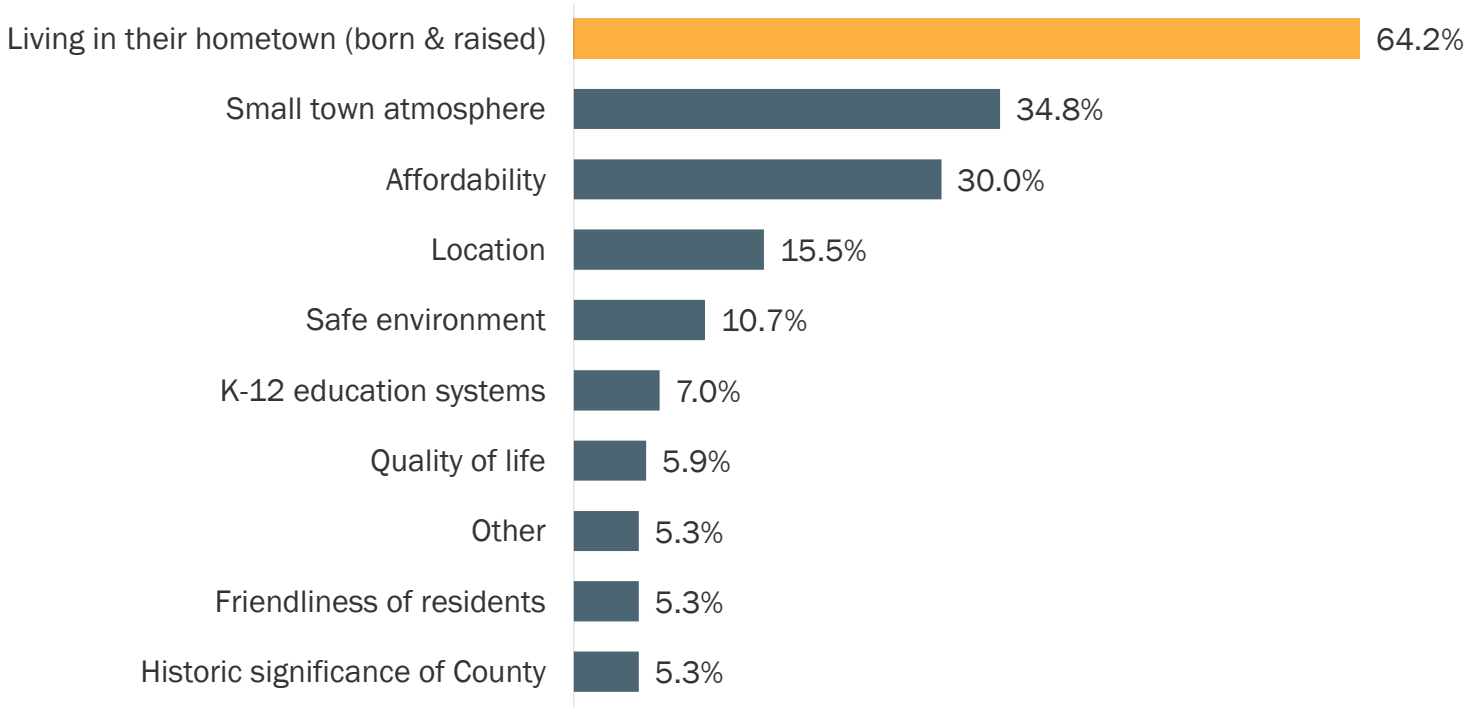
How do you describe where Montgomery County is located? What reference points do you use to tell people how to find Montgomery County?



Other: Near Amsterdam, between Albany and Utica

Resident Perceptions

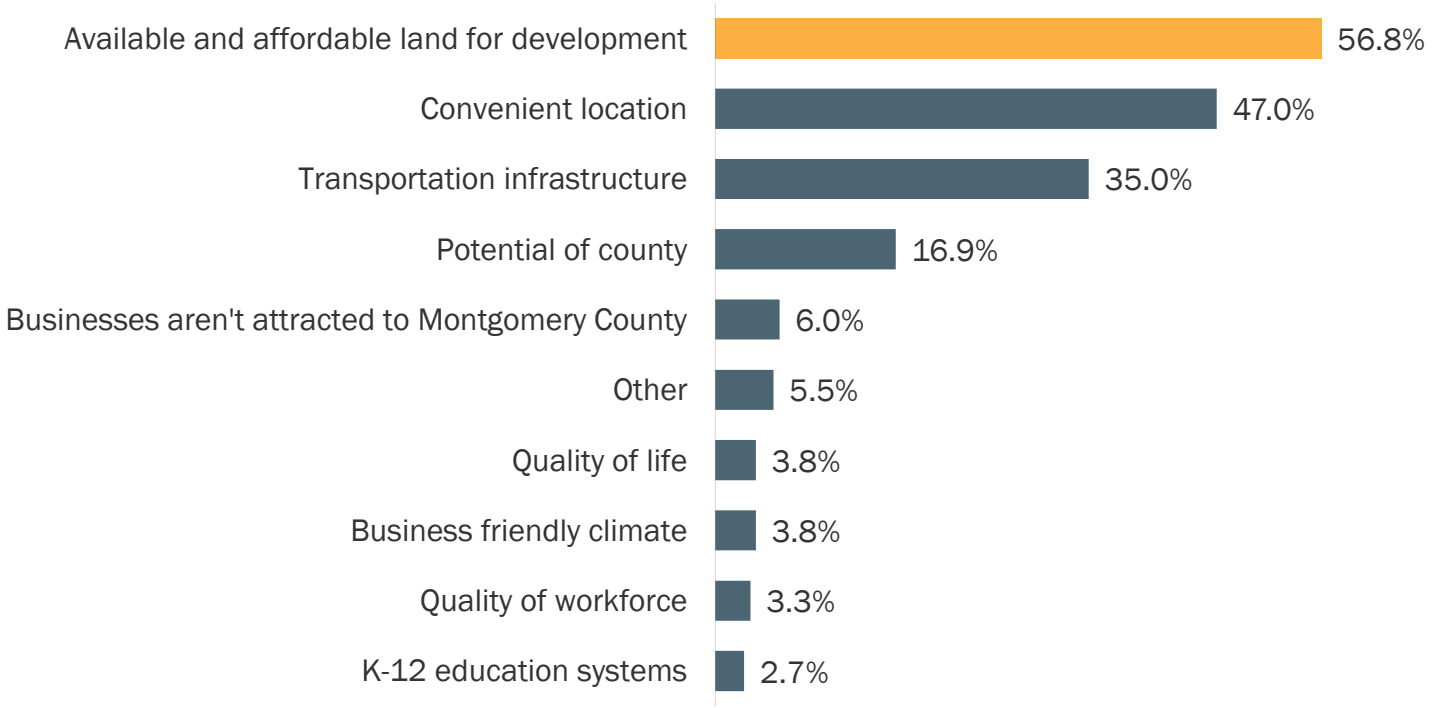
Most residents of Montgomery County are attracted to… Choose two



Other: Agricultural opportunity, welfare

Resident Perceptions

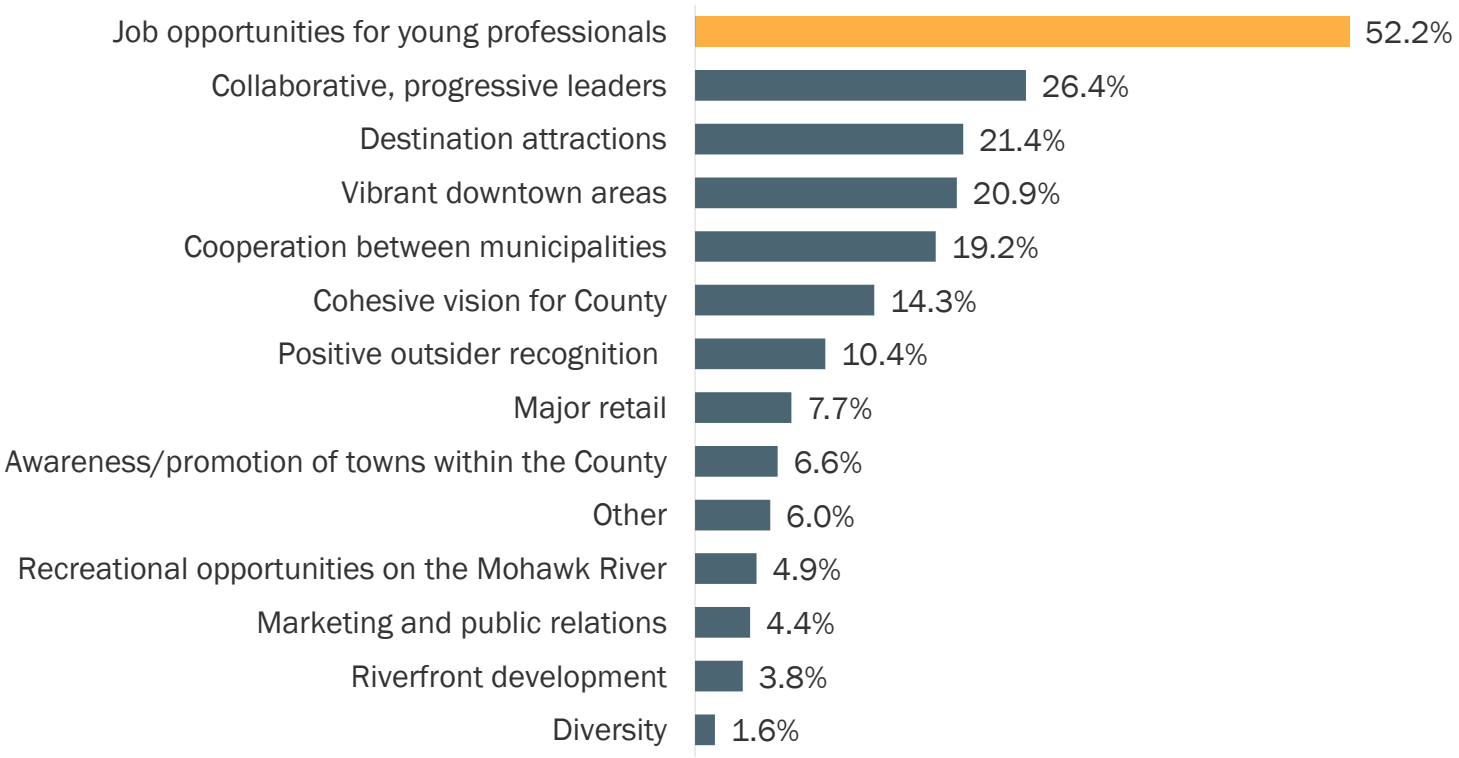
Most businesses are attracted to Montgomery County because of … Choose two



Other: Tax breaks, affordable labor

Resident Perceptions

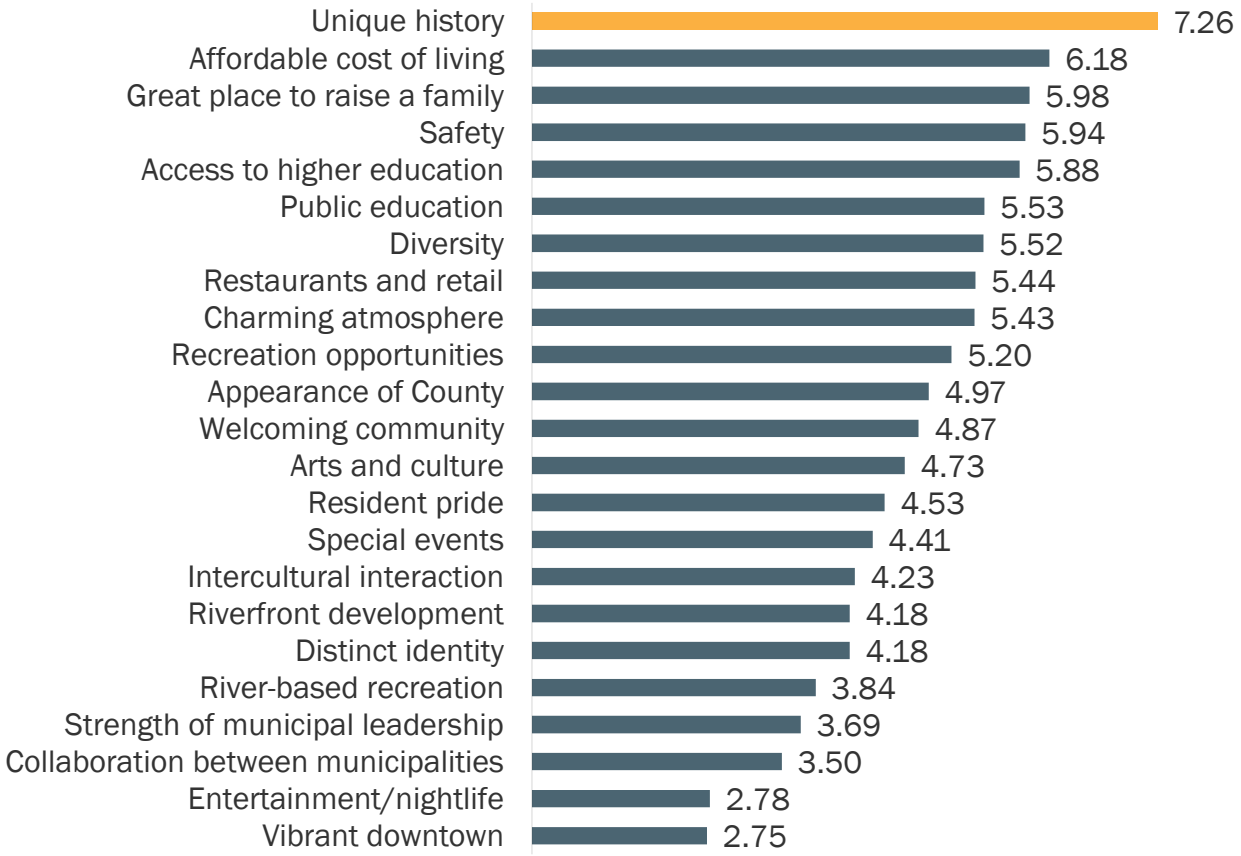
What is missing in Montgomery County? Choose two.



Other: Quality housing, good schools

Resident Perceptions

COMMUNITY ATTRIBUTES: Please rate the following Montgomery County attributes on a scale of 1 to 10, where 1 is "poor" and 10 is "excellent".

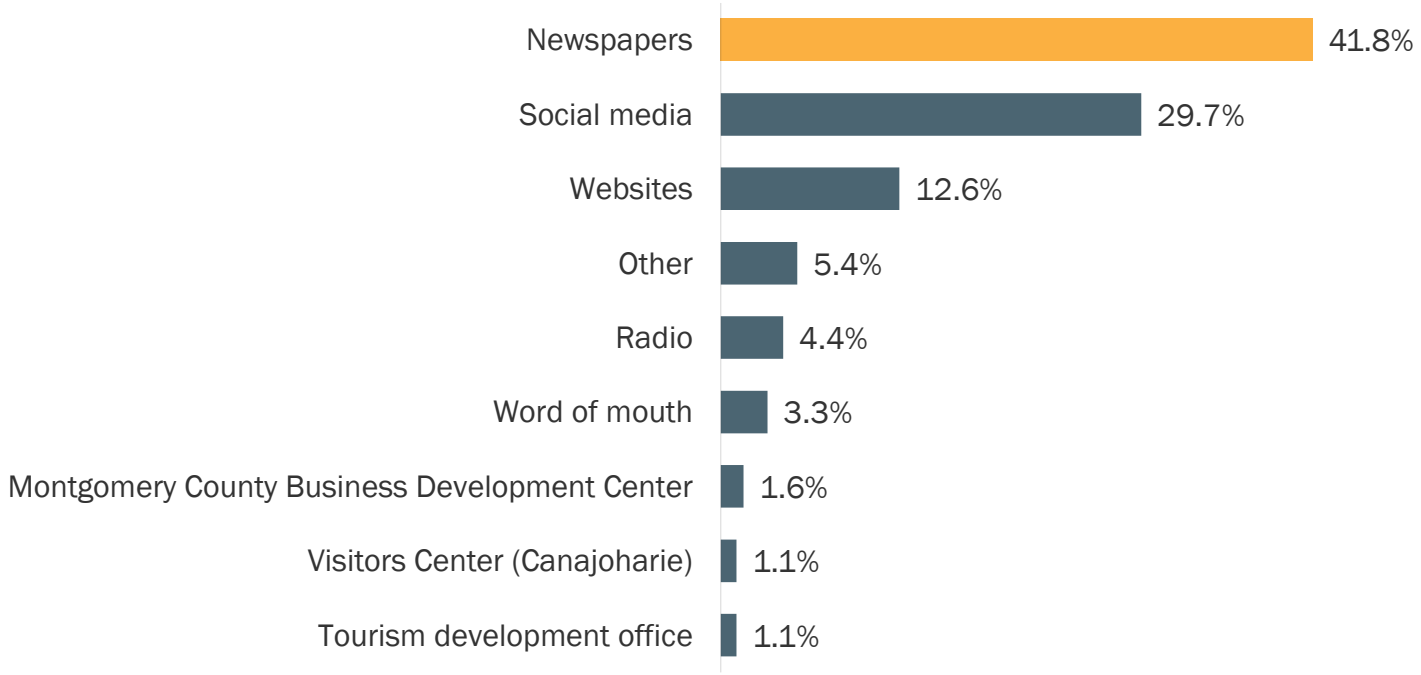


Resident Perceptions

BUSINESS ATTRIBUTES: Please rate the following Montgomery County business attributes on a scale of 1 to 10, where 1 is "poor" and 10 is "excellent".

Resident Perceptions

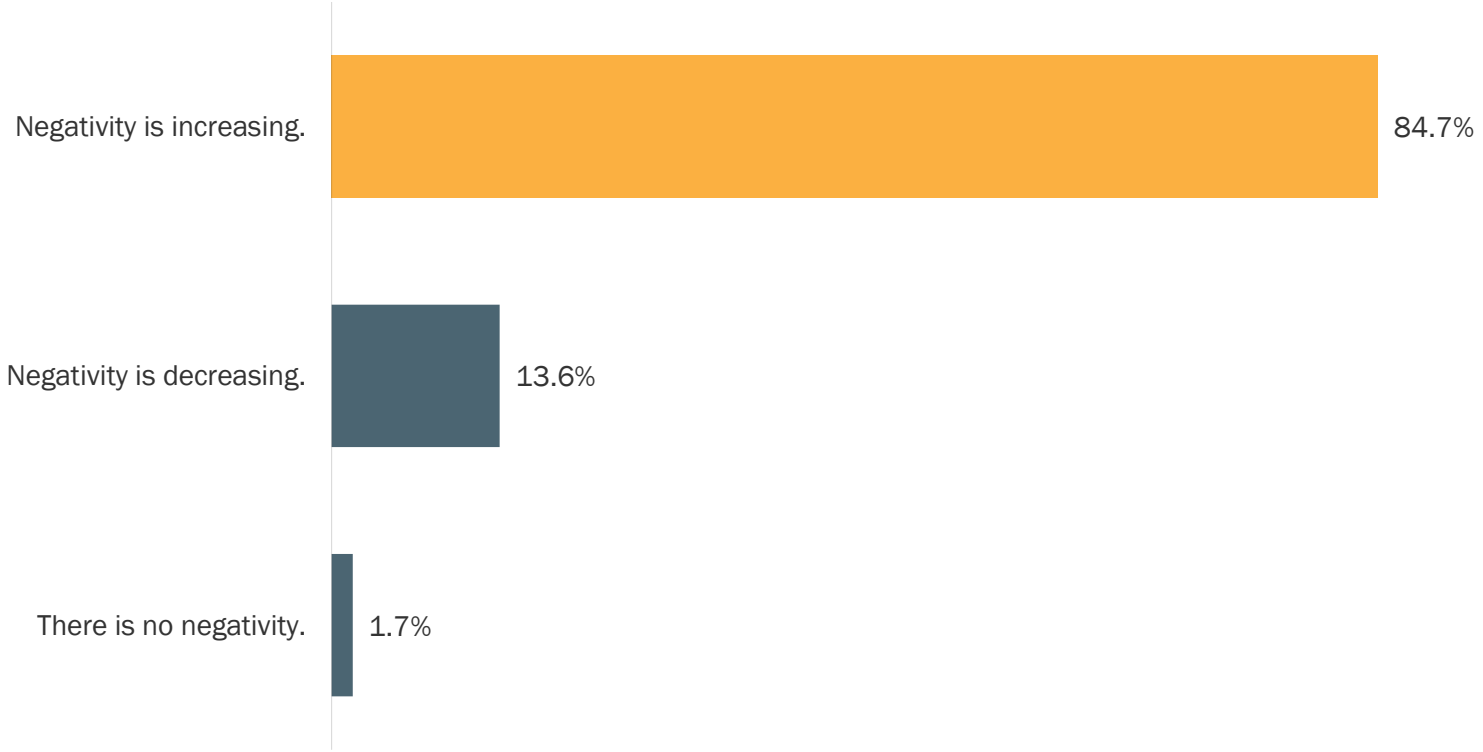
How do you get news about community events happening in Montgomery County?



Other: Chamber website

Resident Perceptions

Research has revealed some negativity among some residents in Montgomery County. In your opinion, which of the following statements is most accurate?



Resident Perceptions

What is the first adjective that comes to mind when describing the following communities?

City of Amsterdam
- Declining
- Crime
- Poverty

Town of Amsterdam
- Retail
- Growing
- I don't know

Town of Canajoharie
- Arkell
- Loss of Beech Nut
- I don't know

Town of Charleston
- Rural
- Farming
- I don't know

Town of Florida
- I don't know (majority)
- Rural
- Farming

Town of Glen
- Rural
- Amish
- I don't know

Resident Perceptions

What is the first adjective that comes to mind when describing the following communities?

Town of Minden

- I don't know (majority)
- Rural
- Nothing

Town of Palatine

- Amish
- Rural
- I don't know

Town of St. Johnsville

- Rural
- Poor
- I don't know

Town of Mohawk

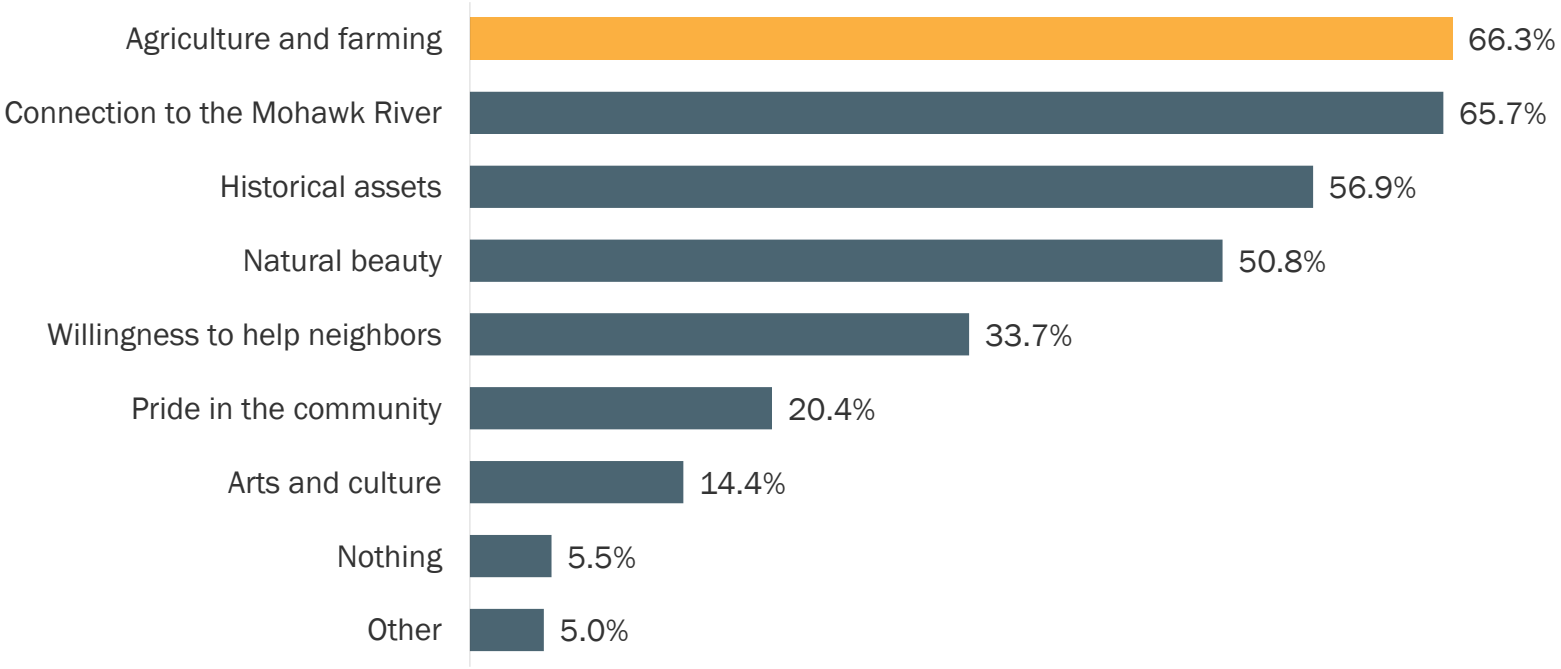
- I don't know (majority)
- County seat
- Fonda

Town of Root

- Rural
- Farming
- I don't know

Resident Perceptions

What do the diverse communities of Montgomery County share in common, if anything?



Other: Government

Resident Perceptions

If you left Montgomery County for another area, what would you miss most about the county?

- The beauty of the area
- Friends and family
- The small-town atmosphere
- The people
- Nothing

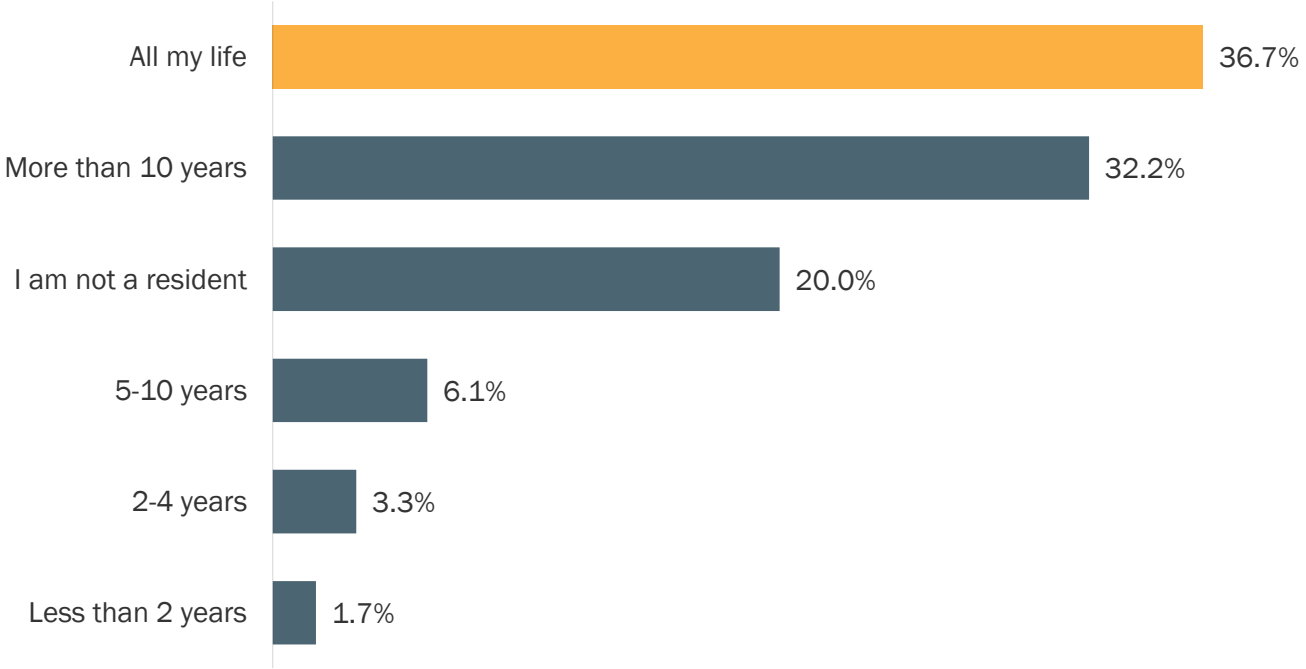
If you left Montgomery County to live in another area, where would you want to live?

- The South
- Saratoga
- Out of state

Resident Perceptions

Demographics

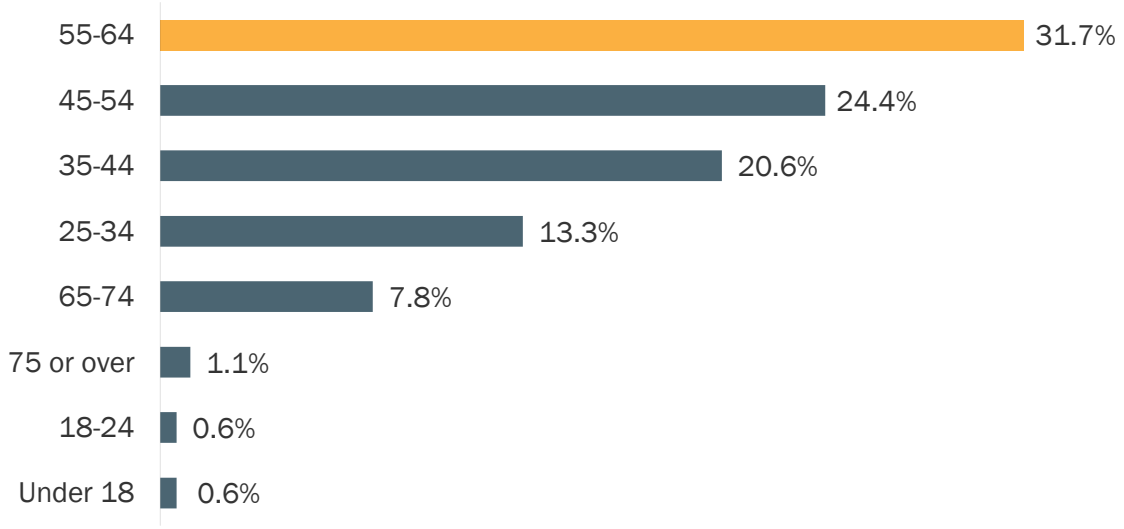
How long have you been a resident of Montgomery County?



Resident Perceptions

Demographics

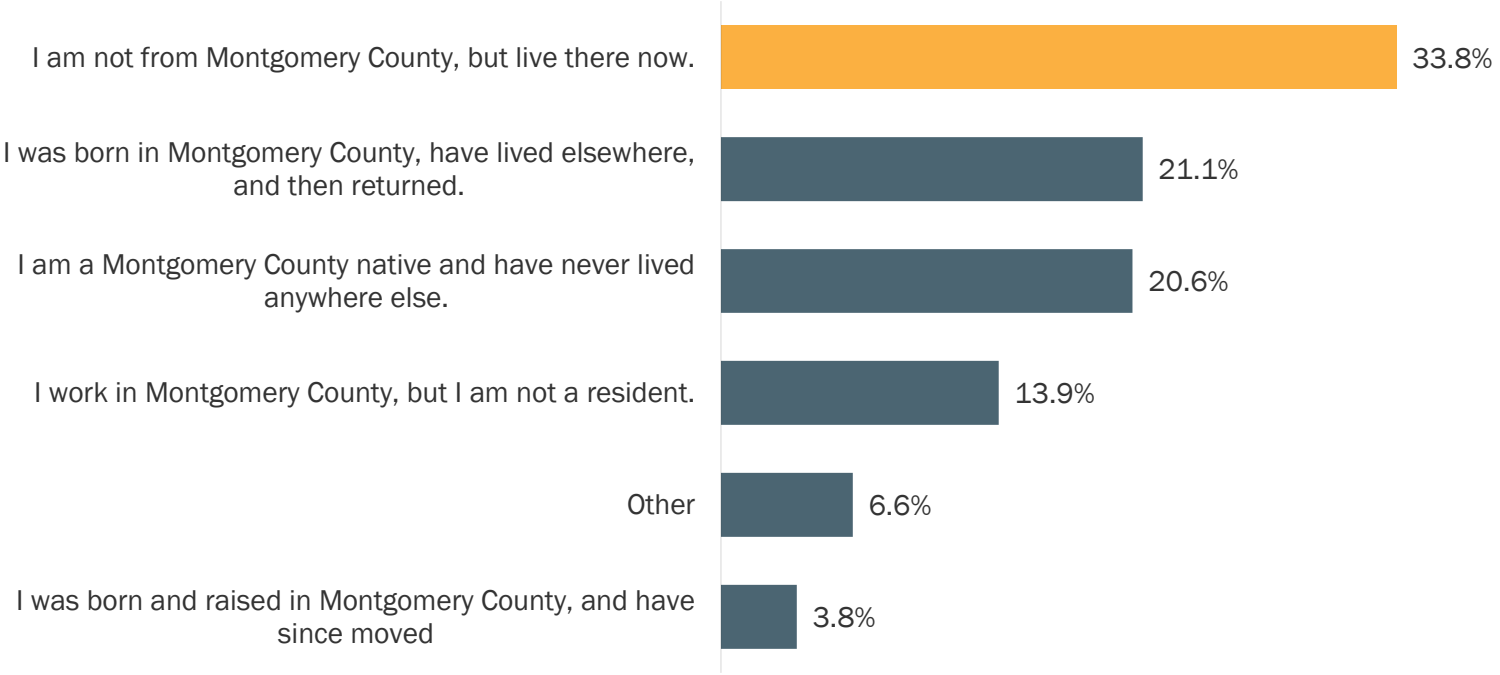
Which of the following includes your age?



Resident Perceptions

Demographics

Please choose the best description of your relationship with Montgomery County from the choices below.

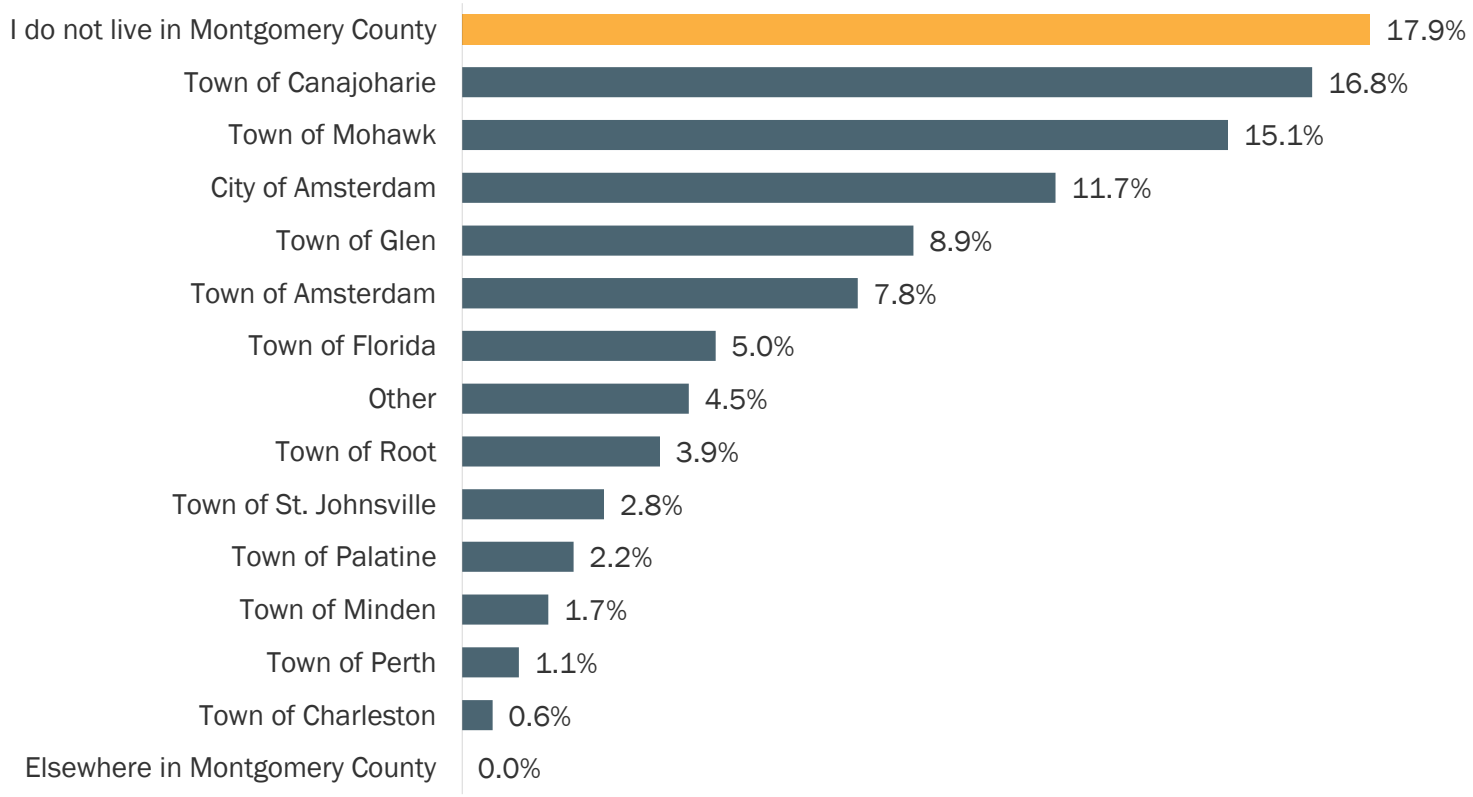


Other: Travel through Montgomery County frequently, former resident, have a relationship with the community

Resident Perceptions

Demographics

In which community do you live?



Other: Gloversville, Fulton County, Hagaman

TAPESTRY STUDY

An Introduction to Community Tapestry

For the past 30 years, companies, agencies and organizations have used segmentation to divide and group their markets to more precisely target their best customers and prospects. This targeting method is superior to using "scattershot" methods that might attract these preferred groups. Segmentation explains customer diversity, simplifies marketing campaigns, describes lifestyle and lifestage of the residents and consumers and incorporates a wide range of public and private data.

Segmentation systems operate on the theory that people with similar tastes, lifestyles and behaviors seek others with those same tastes (hence the phrase "like seeks like"). These behaviors can be measured, predicted and targeted. The Community Tapestry™ segmentation system combines the *who* of lifestyle demography with the *where* of local neighborhood geography to create a model of various lifestyle classifications or segments of actual neighborhoods, identifying distinct behavioral market segments.

Based on the foundation of proven segmentation methodology introduced more than 30 years ago, the Tapestry system classifies U.S. neighborhoods into 12 larger LifeMode groups and within those 12 larger groups, 65 more distinct market segments. Neighborhoods with the most similar characteristics are grouped together while neighborhoods showing divergent characteristics are separated.

TAPESTRY STUDY

Understanding your customers (residents and consumers), knowing customers' shopping patterns, assessing the media preferences of customers, cross-selling to customers, and successfully retaining existing customers for a lifetime are just some activities that are supported by mining customer files. Some of these marketing activities include:

- Customer profiling
- Media targeting
- Direct mail
- Site analysis

The customer profiles reveal the demographics, lifestyles and product preferences of a community's consumers. Consumers can be visitors, residents or businesses, anyone who actively buys or sells goods in the community. By understanding who its customers are, more appropriate responses can be formed to address their needs with better messaging, products and services.

Said simply, the more you can learn about your customers (in this case your residents and visitors), the better you can serve them, keep them and find more like them.

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TAPESTRY STUDY

Purpose

A Community Tapestry Study was conducted to understand the target audience's lifestyle in detail. This included complete profiling reports for Montgomery County and the Montgomery County Regional Profile. Regional comparisons were done in two markets for ease of understanding. Market 1 of Montgomery County's Regional report includes Albany, Saratoga, Schenectady and Warren County. Market 2 of Montgomery County's Regional report includes Schoharie, Otsego, Herkimer, and Hamilton County.

Methodology & Results

Tapestry represents the fourth generation of market segmentation systems that began 30 years ago. This powerful tool classifies U.S. neighborhoods in several ways, including:

- LifeMode Groups:
  - 12 summary groups based on lifestyle and lifestage
  - Members share an experience (being born in the same time period, facing the same lifestage, having a certain level of affluence, etc.)

- Community Tapestry Segments:
  - 65 groups based on sociographic and demographic composition
  - Considers income, occupation, educational attainment, ethnic origin, household composition, marital/living arrangements, patterns of migration, mobility and communication, lifestyle/media patterns
  - Most distinct level of segmentation

TAPESTRY STUDY

The results from the Tapestry studies can be classified into two main reports:

- Who Report:
  - Profiles the demographic and lifestyle segmentation of the population
  - Classifies the population in each of the ways outlined above and indexes the population under study against national averages

- What Report:
  - Provides a detailed profile of the core population for 37 separate lifestyle and media groups in over 2,200 sub-categories
  - Each category is indexed against the average U.S. resident to determine whether a member of the population under study is more or less likely to exhibit the specific behavior

Key findings from the Community Tapestry reports are shown on the following pages.

For the comprehensive Tapestry Who and What reports, please refer to the Report CD. For further explanation of any data or methodologies used to analyze the Tapestry reports, please refer to the supplemental Community Tapestry Handbook. An electronic copy of the Tapestry Handbook can be found at this link: http://www.esri.com/library/brochures/pdfs/tapestry-segmentation.pdf.

COMMUNITY TAPESTRY SEGMENT BREAKDOWN BY LIFEMODE GROUP

The following chart lists all 65 Tapestry Segments under their respective LifeMode Group. The percentages listed are representative of the entire United States and not your community. As you read about Montgomery County's Segments in the following pages, use the table below as a guide when matching those Segments with their corresponding LifeMode Groups.

For a detailed description of LifeMode groups as well as Tapestry Segments, see the handbook available at: http://www.esri.com/library/brochures/pdfs/tapestry-segmentation.pdf

SEGMENT BREAKDOWN BY LIFEMODE GROUP	% of U.S. Pop.
L1. High Society	**12.7%**
01 Top Rung	0.7%
02 Suburban Splendor	1.7%
03 Connoisseurs	1.4%
04 Boomburbs	2.2%
05 Wealthy Seaboard Suburbs	1.4%
06 Sophisticated Squires	2.7%
07 Exurbanites	2.5%
L2. Upscale Avenues	**13.8%**
09 Urban Chic	1.3%
10 Pleasant-Ville	1.7%
11 Pacific Heights	0.6%
13 In Style	2.5%
16 Enterprising Professionals	1.7%
17 Green Acres	3.2%
18 Cozy and Comfortable	2.8%
L3. Metropolis	**5.3%**
20 City Lights	1.0%
22 Metropolitans	1.2%
45 City Strivers	0.7%
51 Metro City Edge	0.9%
54 Urban Rows	0.3%
62 Modest Income Homes	1.0%
L4. Solo Acts	**6.8%**
08 Laptops and Lattes	1.0%
23 Trendsetters	1.1%
27 Metro Renters	1.3%
36 Old and Newcomers	2.0%
39 Young and Restless	1.4%
L5. Senior Styles	**12.4%**
14 Prosperous Empty Nesters	1.8%
15 Silver and Gold	1.0%
29 Rustbelt Retirees	2.1%
30 Retirement Communities	1.5%
43 The Elders	0.6%
49 Senior Sun Seekers	1.2%
50 Heartland Communities	2.2%
57 Simple Living	1.4%
65 Social Security Set	0.6%
L6. Scholars & Patriots	**1.4%**
40 Military Proximity	0.2%
55 College Towns	0.8%
63 Dorms to Diplomas	0.4%
L7. High Hopes	**4.1%**
28 Aspiring Young Families	2.4%
48 Great Expectations	1.7%

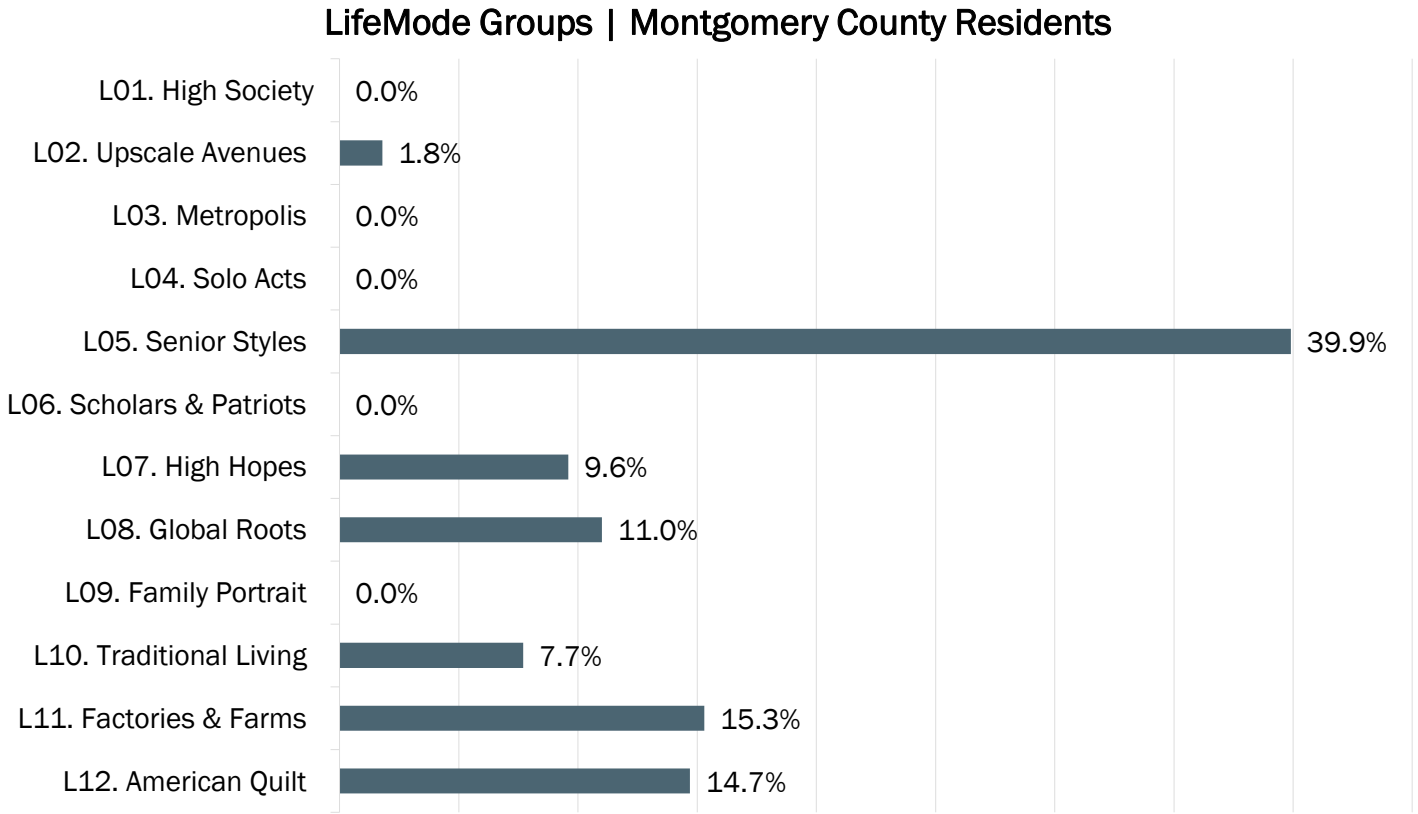
SEGMENT BREAKDOWN BY LIFEMODE GROUP	% of U.S. Pop.
L8. Global Roots	**8.2%**
35 International Marketplace	1.3%
38 Industrious Urban Fringe	1.5%
44 Urban Melting Pot	0.7%
47 Las Casas	0.8%
52 Inner City Tenants	1.5%
58 NeWest Residents	0.9%
60 City Dimensions	0.9%
61 High Rise Renters	0.7%
L9. Family Portrait	**7.8%**
12 Up and Coming Families	3.4%
19 Milk and Cookies	2.0%
21 Urban Villages	0.8%
59 Southwestern Families	1.0%
64 City Commons	0.7%
L10. Traditional Living	**8.8%**
24 Main Street, USA	2.6%
32 Rustbelt Traditions	2.8%
33 Midlife Junction	2.5%
34 Family Foundations	0.9%
L11. Factories & Farms	**9.5%**
25 Salt of the Earth	2.8%
37 Prairie Living	1.0%
42 Southern Satellites	2.7%
53 Home Town	1.5%
56 Rural Bypasses	1.5%
L12. American Quilt	**9.3%**
26 Midland Crowd	3.7%
31 Rural Resort Dwellers	1.6%
41 Crossroads	1.5%
46 Rooted Rural	2.4%

COMMUNITY TAPESTRY WHO REPORT | LIFEMODE GROUPS

The following charts highlight some of the key findings about the Montgomery County and the Regional Profiles as they relate to LifeMode Groups. Remember, members in a LifeMode Group share an experience such as being born in the same time period, facing the same lifestage, having a certain level of affluence, etc.

The number in front of each LifeMode corresponds with the LifeMode Group designation outlined on the community Tapestry Handbook. Please refer to the Community Tapestry Handbook that North Star provided for more in-depth information on each LifeMode Group. The indexing system you will see referenced below has the U.S. average sitting at 100. Therefore, any index above 100 indicates that Montgomery County is delivering above the U.S. average in that LifeMode or Tapestry Segment.

COMMUNITY TAPESTRY WHO REPORT | LIFEMODE GROUPS



Observations: Montgomery County represents seven different LifeMode Groups, *Senior Styles* being the most distinguished. These LifeMode Groups reflect primarily rural lifestyles.

TOP RESIDENT LIFEMODE GROUPS: The U.S. average sits at 100

Senior Styles (39.9%) – Indexed against the U.S. average

- More than 14.4 million households comprise Tapestry's largest summary group
- Incomes in this group cover a wide range, but the median is $41,334
- Younger, more affluent seniors, freed of child rearing responsibilities, are traveling and relocating to warmer climates
- Less affluent, settled seniors are looking forward to retirement and remaining in their homes.
- Residents in some of the older, less privileged segments live alone and collect Social Security and other benefits. Their choice of housing depends on their income. This group may reside in single-family homes, retirement homes, or highrises.
- Golf is their favorite sport; they play and watch golf on TV. They read the newspaper daily and prefer to watch news shows on television.
- Although their use of the Internet is nearly average, they are more likely to shop through QVC than online.

Factories and Farms (15.3%) – Indexed 166 against the U.S. average

- Employment in manufacturing and agricultural industries is typical in these small, settled communities across America's breadbasket.
- Married couples (some with children), most own their homes.
- Median household incomes are $37,716.
- Population change is nominal, and the profile is classic.
- Their lifestyle reflects their locale, emphasizing home and garden care, fishing and hunting, pets, and membership in local clubs.

TOP RESIDENT LIFEMODE GROUPS: The U.S. average sits at 100

American Quilt (14.7%) – Indexed 172 against the U.S. average

- Live in small towns and rural areas and own modest houses.
- Work as skilled laborers in manufacturing, agriculture, local government, service, construction, and farming industries.
- American Quilt includes the Rural Resort Dwellers segment, an older population that is retiring to seasonal vacation spots, and the Crossroads segment, a younger, family population that favors mobile homes.
- Households in American Quilt are also more affluent, with a median income of $41,953, and more are homeowners.
- However, the rural lifestyle is also evident, with fishing and hunting (and power boats) and a preference for pickups and country music.

Global Roots (11.0%) – Indexed 111 against the U.S. average

- Ethnic diversity is the common thread among the eight segments in Global Roots;
- Las Casas and NeWest Residents represent a strong Hispanic influence in addition to a broad mix of cultural and racial diversity found in Urban Melting Pot and International Marketplace.
- Residents are young, earn modest incomes, and tend to rent in multi-unit buildings.
- Their youth reflects recent immigration trends; half of all households have immigrated to the United States within the past ten years.
- Married couples, usually with children; single parents; and people who live alone are typical
- Spending is high for baby products, children's clothing and toys.
- Residents are less likely than other groups to have home PCs but just as likely to use cell phones.

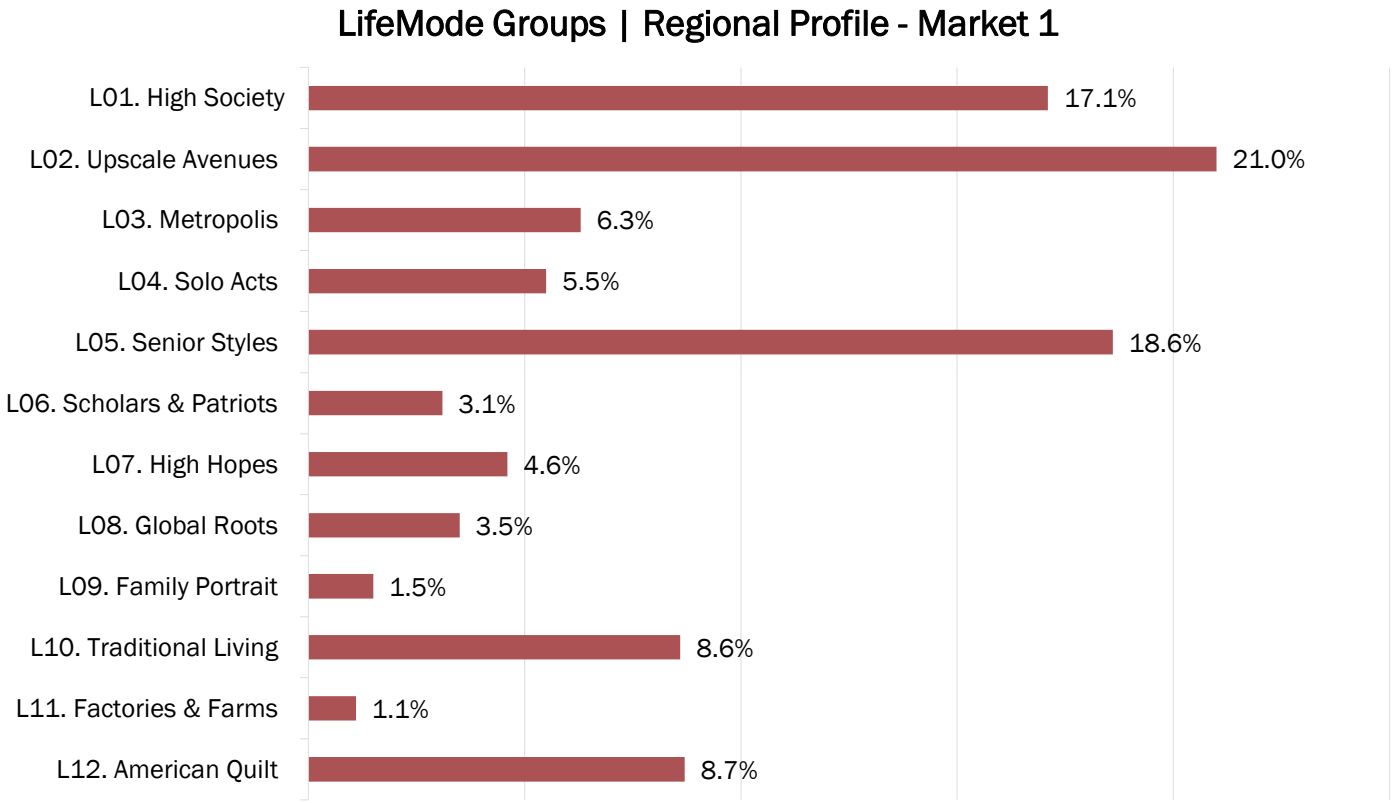
TOP RESIDENT LIFEMODE GROUPS: The U.S. average sits at 100

High Hopes (9.6%) – Indexed 248 against the U.S. average

- These residents are a mix of married couples, single parents, and singles who seek the "American Dream" of homeownership and a rewarding job.
- Most live in single-family houses or multi-unit buildings; approximately half own their homes.
- Many would move to a new location for better opportunities. Many are young, mobile, and college educated; one-third are younger than 35 years.
- The median household income is $40,928.

COMMUNITY TAPESTRY WHO REPORT | LIFEMODE GROUPS

Market 1 of Montgomery County's Regional report includes Albany, Saratoga, Schenectady and Warren County.



Observations: The Regional Profile represents every LifeMode group. Unlike the resident profile, *Upscale Avenues*, an affluent LifeMode Group, is the largest profile.

REGIONAL LIFEMODE GROUPS: The U.S. average sits at 100

Upscale Avenues (21.0%) - Indexed 161 against the U.S. average

- Many are well educated with above average earnings and are successful from years of hard work
- Median household income is $65,912.
- Prosperous domesticity also characterizes the lifestyle in Upscale Avenues.
- They invest in their homes; the owners work on landscaping and home remodeling projects, and the renters buy new furnishings and appliances. They play golf, lift weights, go bicycling, and take domestic vacations.
- Although they are partial to new cars, they also save and invest their earnings.

Senior Styles (18.6%) - Indexed 175 against the U.S. average

- For a full description, see page 75.

High Society (17.1%) - Indexed 125 against the U.S. average

- The markets in High Society are affluent and well educated.
- The median household income for this group is $100,216.
- Most households are married-couple families residing in affluent neighborhoods.
- High Society is one of the least ethnically diverse groups in the United States.
- Residents of High Society are affluent and active—financially, civically, and physically. They participate in a wide variety of public activities and sports and travel extensively.
- Try the Internet or radio instead of television to reach these markets.

REGIONAL LIFEMODE GROUPS: The U.S. average sits at 100

Family Portrait (8.7%) - Indexed 101 against the U.S. average

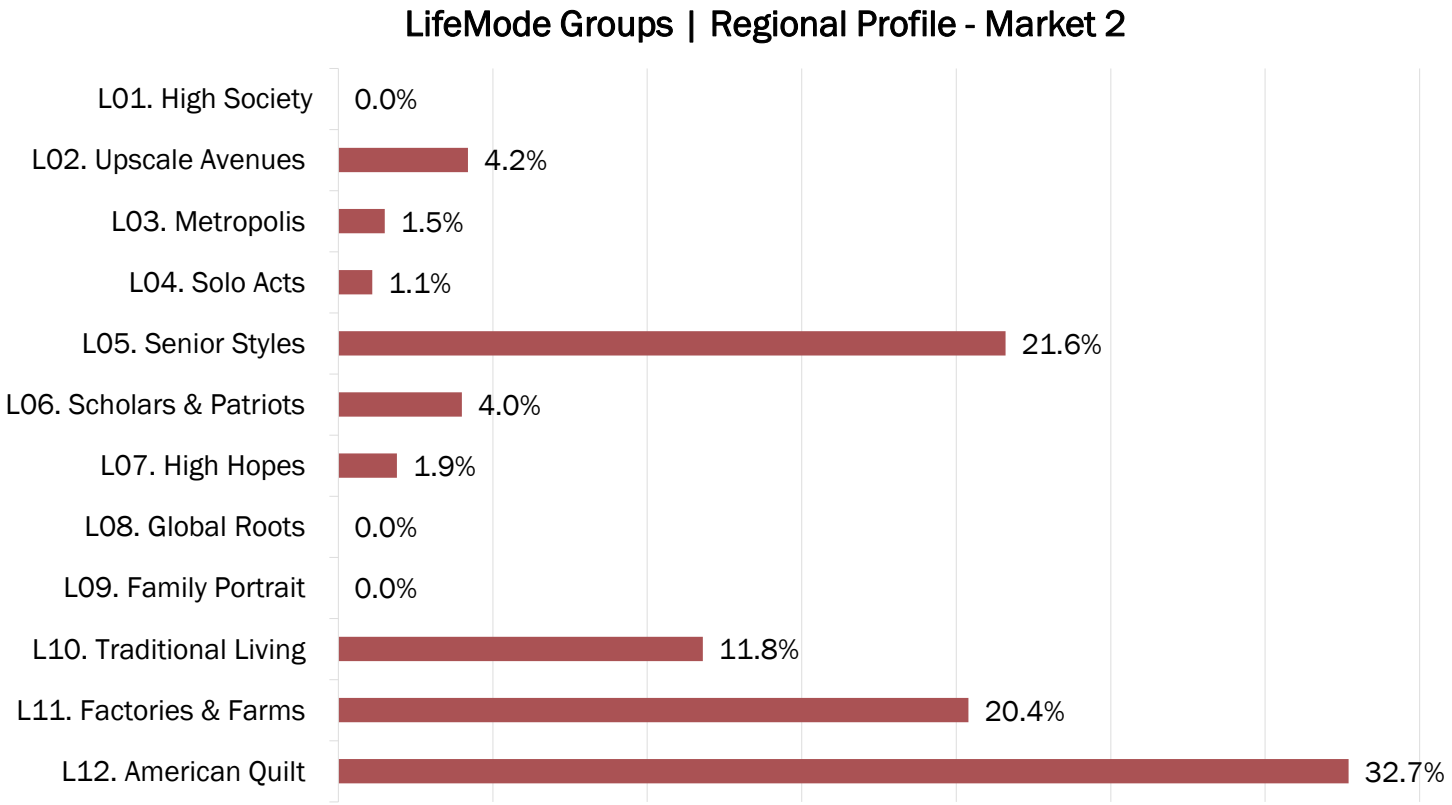
- Defined by youth, family and the presence of children
- The group is also ethnically diverse: more than 30 percent of the residents are of Hispanic descent.
- The neighborhoods are predominantly composed of homeowners who live in single-family homes.
- Most households include married couples with children who contribute to the group's large household size, averaging more than 3.09 persons per household.
- Their lifestyle reflects their youth and family orientation—buying infant and children's clothing and toys and visiting theme parks and zoos.

Traditional Living (8.6%) – Indexed 112 against the U.S. average

- What most consider middle America; hardworking, settled families
- Earn a modest living and typically own single-family homes in more established communities
- Median age is 37.8, which conveys residents' lifestage – older residents completing child rearing responsibilities and looking forward to retirement.
- They buy standard, four-door American cars, belong to veterans' clubs and fraternal organizations, take care of their homes and gardens, and rely on traditional media such as newspapers for their news.

COMMUNITY TAPESTRY WHO REPORT | LIFEMODE GROUPS

Market 2 of Montgomery County's Regional report includes Schoharie, Otsego, Herkimer, and Hamilton County



Observations: The second Regional Profile represents fewer LifeMode Groups than the first market. *American Quilt* and *Factories & Farms* hold much higher percentages in this market.

REGIONAL LIFEMODE GROUPS: The U.S. average sits at 100

American Quilt (32.7%) - Indexed 381 against the U.S. average
- For a full description, see page 76.

Senior Styles (21.6%) - Indexed 203 against the U.S. average
- For a full description, see page 75.

Factories & Farms (20.4%) - Indexed 220 against the U.S. average
- For a full description, see page 75.

Traditional Living (11.8%) - Indexed 155 against the U.S. average
- For a full description, see page 80.

Upscale Avenues(4.2%) - Indexed 32 against the U.S. average
- For a full description, see page 79.

COMMUNITY TAPESTRY WHO REPORT | COMMUNITY SEGMENTS

Community Tapestry Segments are the most distinct level of segmentation within the Tapestry System, dividing members of a population into 65 groups based on sociographic and demographic composition. Tapestry Segments take into consideration things like income, occupation, educational attainment, ethnic origin, household composition, marital / living arrangements, patterns of migration, mobility, communication, and lifestyle and media patterns.

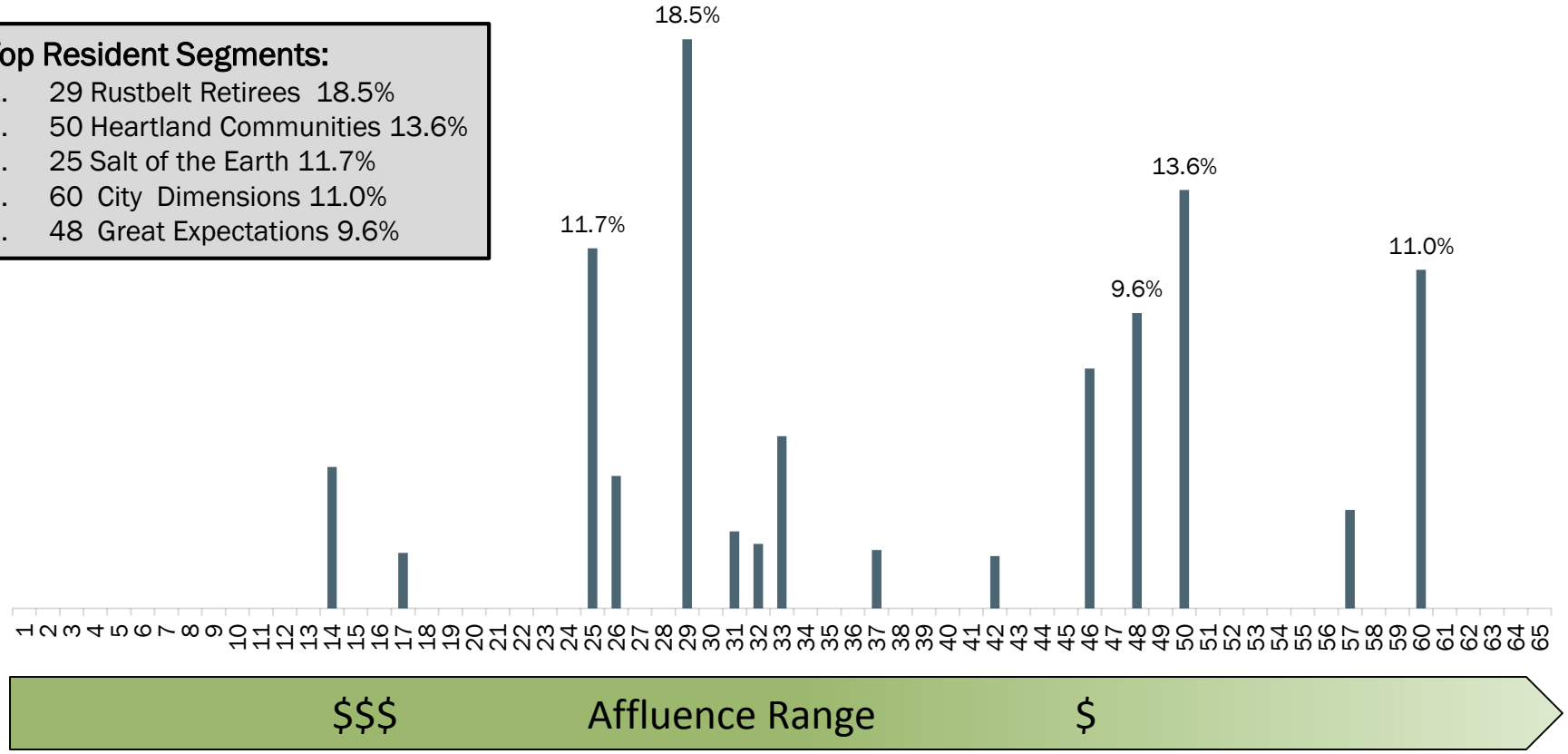
The chart that follows illustrates delivery within all the Segments for Montgomery County residents. The Segments are organized by level of affluence – Segment 1 is the most affluent and Segment 65 is the least affluent Segment.

COMMUNITY TAPESTRY WHO REPORT | COMMUNITY SEGMENTS

Tapestry Segments | Montgomery County Residents

Top Resident Segments:

1. 29 Rustbelt Retirees 18.5%
2. 50 Heartland Communities 13.6%
3. 25 Salt of the Earth 11.7%
4. 60 City Dimensions 11.0%
5. 48 Great Expectations 9.6%



Montgomery residents represent 15 segments, *"Rustbelt Retirees"* having the greatest percentage.

COMMUNITY TAPESTRY WHO REPORT | COMMUNITY SEGMENTS

29 Rustbelt Retirees (18.5%) – Indexed 1,048 against the U.S. average

- The median age is 43.4 and the median HHI is $46,200, and 40% of households draw Social Security benefits.
- These neighborhoods can be found in older, industrial northeastern cities.
- These residents are settled and hardworking, loyal to their communities.
- They take pride in their homes and gardens and watch their pennies, looking for discounts.
- They love pets, reading the paper, and watching TV.

50 Heartland Communities (13.6%) – Indexed 734 against the U.S. average

- Well-settled and closely knit, residents have a median age of 41 years.
- Half of these residents are retired.
- Mostly married couples, half of which whose children have already left home.
- The median household income for these residents is $32,200.
- They invest time and money into their homes and communities.
- Avid gardeners who take pride in their vegetables.
- They attend country music shows, go bowling and enjoy outdoor activities.
- They participate in local religious and civic activities and take an interest in local politics.
- Internet use is limited to email and games.

COMMUNITY TAPESTRY WHO REPORT | COMMUNITY SEGMENTS

25 Salt of the Earth (11.7%) – Indexed 446 against the U.S. average

- Married couples with and without children, this segment is one of the least diverse.
- With a median age of 39.8, the median HHI is $47,000.
- These residents live in rural areas and are rooted in their traditional hardworking lifestyles.
- Independent and practical, they enjoy home improvement and maintain their own cars.
- They participate in fundraising, veteran's clubs, and church. They enjoy fishing and hunting and have pets, usually dogs.

60 City Dimensions (11.0%) – Indexed 1,188 against the U.S. average

- This segment is characterized by diversity in household type and ethnicity.
- Primarily young and single with a median age of 28.7.
- The median HHI is $26,000.
- They are frequent viewers of cable television and most homes own more than one television.
- These residents are avid watchers of sports but rarely participants.
- Prefer to shop at discount stores and many of the homes do not have amenities such as central air conditioning.
- Prefer purchasing used domestic cars to foreign made cars. For entertainment, they enjoy dining out, going dancing and attending music performances.

COMMUNITY TAPESTRY WHO REPORT | COMMUNITY SEGMENTS

48 Great Expectations (9.6%) – Indexed 620 against the U.S. average

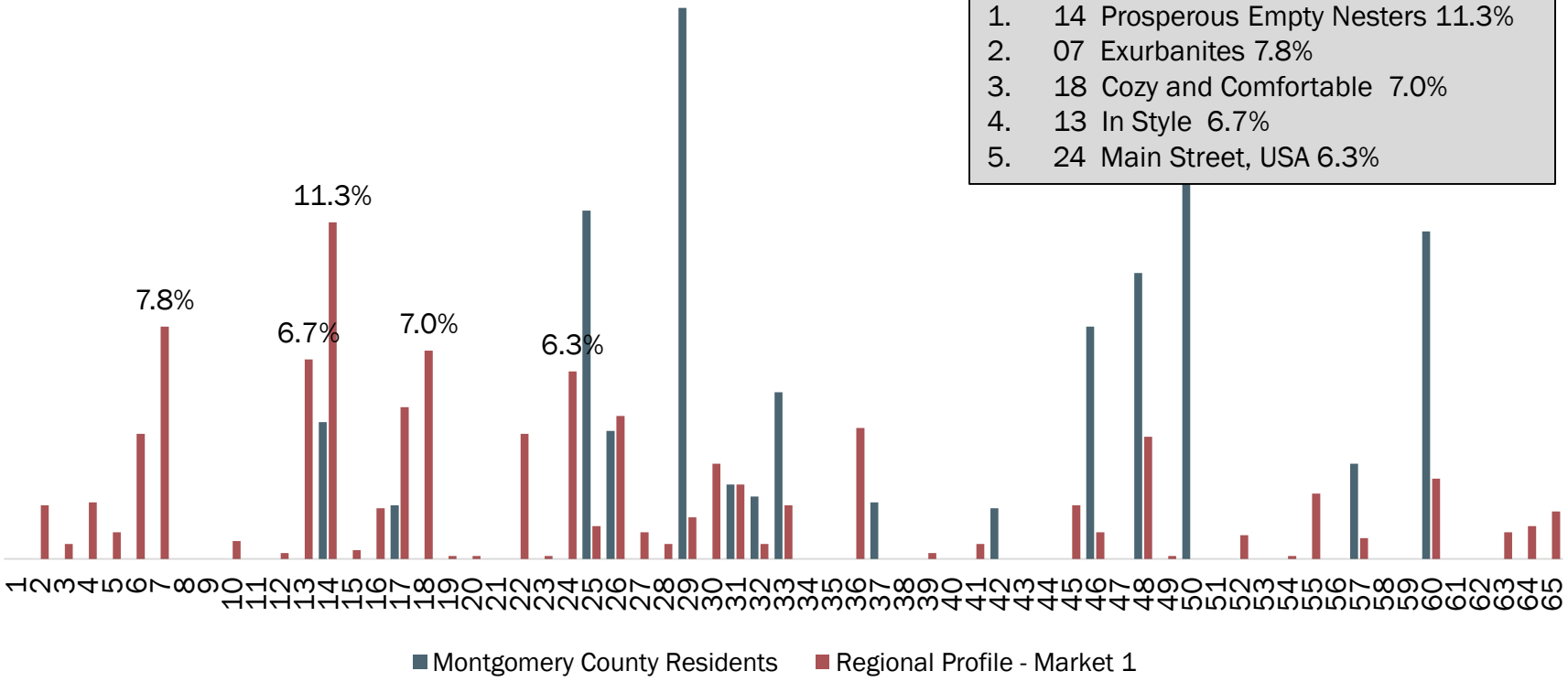
- Young singles and married couples dominate the Great Expectations market.
- The median age is 32.8 years and the median HHI is $36,000.
- Located throughout the country, with higher proportions in the Midwest and South.
- Enjoy a young and active lifestyle that includes going to bars, dancing and playing pool. In addition, they go out for dinner and a movie, visit theme parks and go to the zoo and the beach.
- Take advantage of the convenient fast-food restaurants.
- Have tried their hand at all different sports.
- They watch TV for entertainment and news; shop at discount stores; and dress youthfully.

COMMUNITY TAPESTRY WHO REPORT | REGIONAL SEGMENTS

Tapestry Segments | Montgomery County Residents vs. Regional Profile
Market 1

Top Region #1 Segments:

1. 14 Prosperous Empty Nesters 11.3%
2. 07 Exurbanites 7.8%
3. 18 Cozy and Comfortable 7.0%
4. 13 In Style 6.7%
5. 24 Main Street, USA 6.3%



$$$ Affluence Range $

Regional Profile 1 represents a wider range of Segments than the Resident Profile, and exhibits upper and middle-range affluence levels.

COMMUNITY TAPESTRY WHO REPORT | REGIONAL SEGMENTS

14 Prosperous Empty Nesters (11.3%) – Indexed 590 against the U.S. average

- Married couples with no children living at home; over half of this segment is 55+.
- Median age is 46 years and median HHI is $64,000.
- Empty nesters are concentrated on the eastern seaboard and over 75% live in homes built before 1980.
- Empty nesters are active physically. Concern for physical health leads them to play golf, ride bicycles and work out regularly.
- Show active interest in their homes and communities. Remodeling and lawn care are part of home maintenance. Civic participation is high; enjoy traveling at home and abroad; read extensively, including two or more daily newspapers.

07 Exurbanites (7.8%) – Indexed 318 against the U.S. average

- Living beyond the urban fringe, Exurbanites prefer open space with affluence.
- Majority of residents are empty nesters, but the median age is 43. Median HHI is $80,000+.
- Consult with financial planners and track investments on the Internet.
- Listen to public radio, donate to PBS, and remain active in their communities.
- Enjoy golf, boating, hiking, kayaking, vacations, and working on their homes and gardens.
- Practical shoppers favoring Old Navy, Target, and L.L. Bean.

COMMUNITY TAPESTRY WHO REPORT | REGIONAL SEGMENTS

18 Cozy and Comfortable (7.0%) – Indexed 318 against the U.S. average

- Middle-aged, married couples settled in single-family homes in older neighborhoods.
- Median age is 40.4 and median HHI is $61,000.
- Located mainly in suburban areas in the Midwest and Northeast.
- Prefer mutual funds and consult financial planners. Home improvement jobs, including lawn care, are important to the Cozy and Comfortable segment.
- Leisure time includes golf.
- While most of them own computers, owning the latest technology is not a high ranking priority. Television is much more important and many households own four or more TVs.

13 In Style (6.7%) – Indexed 315 against the U.S. average

- Professional couples who live in the suburbs but favor the lifestyle of city dwellers.
- Median age is 37.8 and median HHI is $65,000+.
- Physical fitness is an integral part of their lifestyle with many participating in Weight Watchers and exercise programs.
- They enjoy dining out at The Cheesecake Factory and Chili's Grill and Bar, watching E! and the Golf Channel, traveling domestically, and going to rock concerts and live theater shows.

COMMUNITY TAPESTRY WHO REPORT | REGIONAL SEGMENTS

24 Main Street, USA (6.3%) – Indexed 286 against the U.S. average

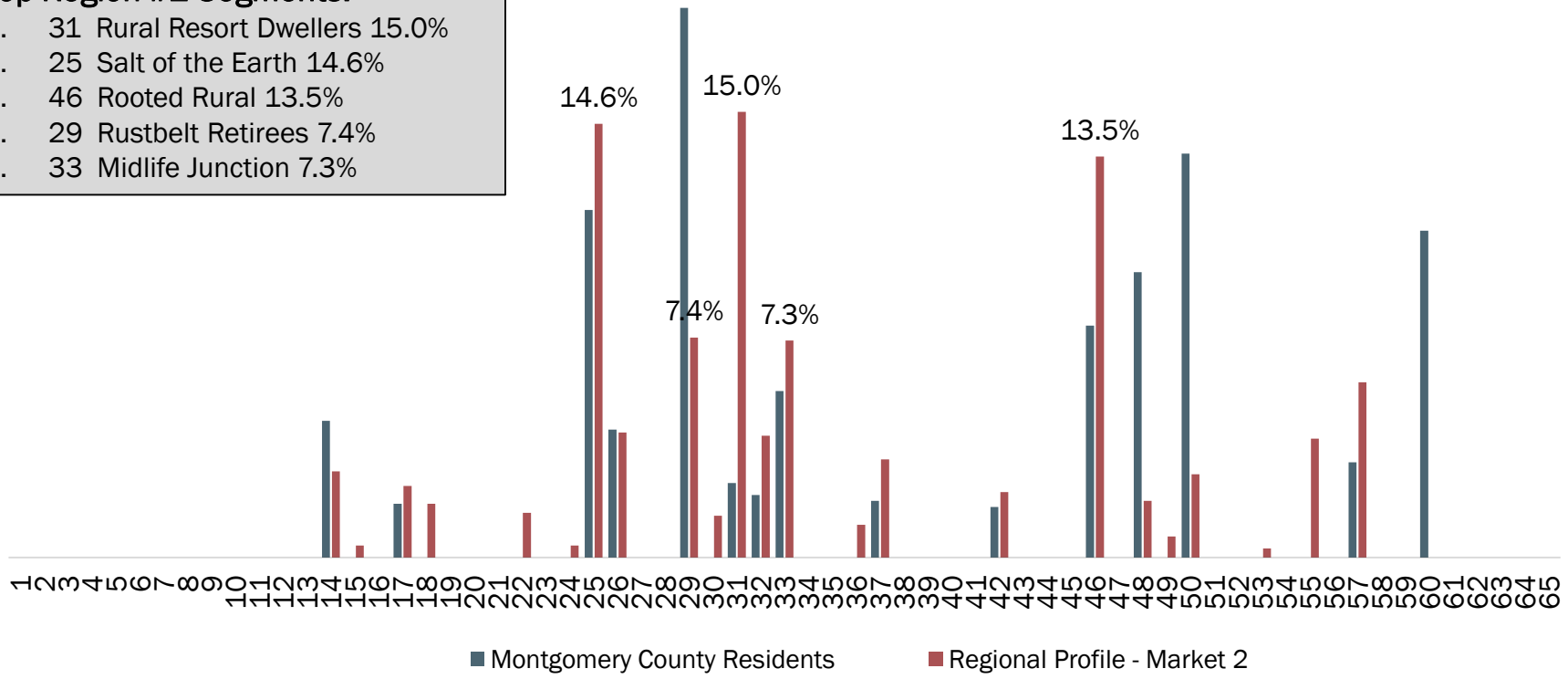
- A mix of household types, similar to that of the U.S. distribution, and a median age of 36, similar to U.S. median age.
- Median HHI is $50,400.
- Residents of Main Street, USA are active in their communities, taking part in fundraisers and volunteer programs, taking day trips to beach, theme parks, or zoos.
- For leisure, they enjoy dinner and a movie. Favorite restaurants include Applebee's, Outback and Red Lobster.
- They use the internet for games, searching for employment and shopping.
- As owners of older homes, householders invest in improvement projects. They prefer to complete the jobs themselves with tools purchased at Lowe's or Home Depot.

COMMUNITY TAPESTRY WHO REPORT | REGIONAL SEGMENTS

Tapestry Segments | Montgomery County Residents vs. Regional Profile Market 2

Top Region #2 Segments:

1. 31 Rural Resort Dwellers 15.0%
2. 25 Salt of the Earth 14.6%
3. 46 Rooted Rural 13.5%
4. 29 Rustbelt Retirees 7.4%
5. 33 Midlife Junction 7.3%



Regional Profile 2 represents a more homogenous range of Segments than Regional Profile 1, and exhibits middle-range affluence levels.

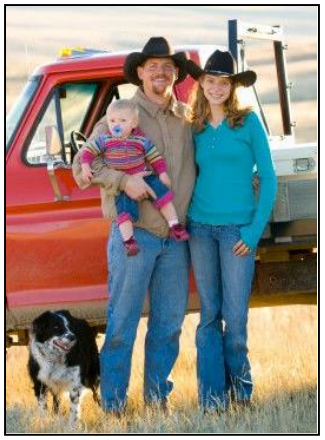
COMMUNITY TAPESTRY WHO REPORT | REGIONAL SEGMENTS

31 Rural Resort Dwellers (15.0%) – Indexed 1,008 against the U.S. average

- Favoring milder climates and pastoral settings, residents live in rural non-farm areas.
- The median age is 46 and the median HHI is $43,400; many are married with no children.
- There is little diversity.
- Modest living and simple consumer taste defines these residents who enjoy home improvement, baking, listening to country music, and hunting.
- Financial and retirement related matters are a big concern for this group.

25 Salt of the Earth (14.6%) – Indexed 558 against the U.S. average

- Married couples with and without children, this segment is one of the least diverse.
- With a median age of 39.8, the median HHI is $47,000.
- These residents live in rural areas and are rooted in their traditional hardworking lifestyles.
- Independent and practical, they enjoy home improvement and maintain their own cars.
- They participate in fundraising, veteran's clubs, and church. They enjoy fishing and hunting and have pets, usually dogs.

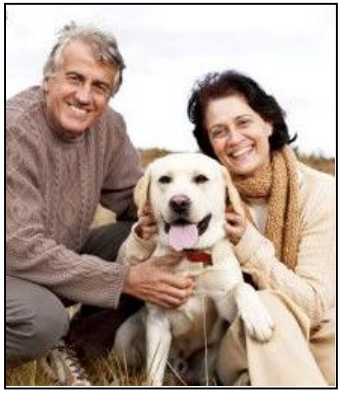


COMMUNITY TAPESTRY WHO REPORT | REGIONAL SEGMENTS

46 Rooted Rural (13.5%) – Indexed 611 against the U.S. average

- Older, with a median age of 40.6 years.
- Mostly married couples who are empty nesters.
- Median income for Rooted Rural households is $36,000.
- Located in rural areas of the South and do not move very often.
- These people are do-it-yourselfers. Most people do their own house and car maintenance and repair.
- They take pride in their gardens; prefer to cook their own food rather than dine out.
- They prefer driving trucks to sedans.
- They shop at Wal-Mart if there is a convenient location.
- Internet and PC usage is not popular among these residents.

29 Rustbelt Retirees (7.4%) – Indexed 419 against the U.S. average

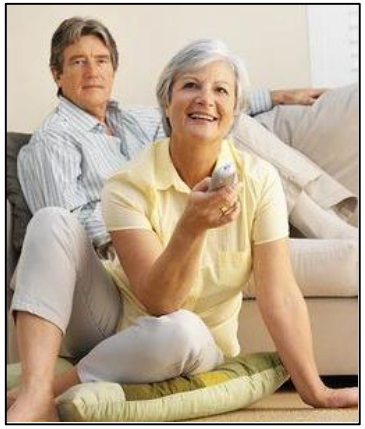


- The median age is 43.4 and the median HHI is $46,200, and 40% of households draw Social Security benefits.
- These neighborhoods can be found in older, industrial northeastern cities.
- These residents are settled and hardworking, loyal to their communities.
- They take pride in their homes and gardens and watch their pennies, looking for discounts.
- They love pets, reading the paper, and watching TV.

COMMUNITY TAPESTRY WHO REPORT | REGIONAL SEGMENTS

33 Midlife Junction (7.3%) – Indexed 321 against the U.S. average

- Phasing out of their child rearing years, these residents are approaching retirement.
- The median age is 40 and the median HHI is $43,000.
- They live quiet, settled lives (typically in the suburbs) and spend their money carefully, shopping at bargain stores such as Wal-Mart, Kmart, and JCPenney.
- They enjoy dining out, watching TV, tending to their gardens, reading newspapers and books, and using the
- Internet to communicate with friends and family.



COMMUNITY TAPESTRY WHO REPORT | SEGEMENT COMMONALITIES

Montgomery County Residents		Regional Profile - Market 1		Regional Profile - Market 2	
29 Rustbelt Retirees	18.5%	14 Prosperous Empty Nesters	11.3%	31 Rural Resort Dwellers	15.0%
50 Heartland Communities	13.6%	07 Exurbanites	7.8%	25 Salt of the Earth	14.6%
25 Salt of the Earth	11.7%	18 Cozy and Comfortable	7.0%	46 Rooted Rural	13.5%
60 City Dimensions	11.0%	13 In Style	6.7%	29 Rustbelt Retirees	7.4%
48 Great Expectations	9.6%	24 Main Street, USA	6.3%	33 Midlife Junction	7.3%
46 Rooted Rural	7.8%	17 Green Acres	5.1%	57 Simple Living	5.9%
33 Midlife Junction	5.6%	26 Midland Crowd	4.8%	26 Midland Crowd	4.2%
14 Prosperous Empty Nesters	4.6%	36 Old and Newcomers	4.4%	32 Rustbelt Traditions	4.1%
26 Midland Crowd	4.3%	06 Sophisticated Squires	4.2%	55 College Towns	4.0%
57 Simple Living	3.2%	22 Metropolitans	4.2%	37 Prairie Living	3.3%

Observations:

- The Montgomery County Resident Profile contains a variety of segments, indicating a diverse population.
- The Regional Profile for Market 2 shares the most commonalities (five) with the Montgomery County Resident Profile.

COMMUNITY TAPESTRY WHAT REPORT | UNDERSTANDING

The Montgomery County Resident and Regional What Reports can be found in their entirety on the Report CD. The following information can be used as a guide to help you more fully understand the What Reports. When used correctly, this report will help you gain a much deeper understanding of resident and visitors populations and serve as a valuable tool for economic development.

We encourage you to familiarize yourself with the What Reports and challenge economic development entities to focus recruitment efforts on businesses frequented by populations with the same demographic composition as Montgomery County.

As explained previously, the Tapestry What Report provides a detailed analysis of the audience under study for 37 separate Lifestyle and Media groups (see list on page 66) in over 2,200 categories. Lifestyle and media groups are very broad (“Shopping”) while sub-categories are much more specific (“shopped at The Gap in the past 3 months”).

COMMUNITY TAPESTRY WHAT REPORT | UNDERSTANDING THE REPORT

Complete list of all Tapestry Lifestyle and Media groups:

- Apparel
- Appliances
- Attitudes
- Automobiles
- Automotive/Aftermarket
- Baby Products
- Beverage Alcohol
- Books
- Cameras
- Civic Activities
- Convenience Stores
- Electronics
- Financials
- Furniture
- Garden Lawn
- Grocery
- Health
- Home Improvement
- Insurance
- Internet
- Leisure
- Mail/Phone/Yellow Pages
- Watch
- Read
- Listen
- Personal Care
- Pets
- Restaurant
- Shopping
- Smoking
- Sports
- Telephone
- Tools
- Toys/Games
- Travel
- Video/DVDs
- Miscellaneous

COMMUNITY TAPESTRY WHAT REPORT | READING THE REPORT

All categories are indexed against the national average of people who exhibit that certain lifestyle trait. An index of 100 is average, thus anything above an index of 100 is above average and anything below an index of 100 is below average. The example below can help you understand this indexing system.

As an example, perhaps a community indexes 288 in shopping at Harris Teeter within the last six months. This means that community is about 2.9 times more likely to shop at Harris Teeter than the U.S. average.

Economic development entities in your community can use this information as a sales tool to recruit potential businesses with cold hard numbers. Let's return to the Harris Teeter example: If the community currently has a Harris Teeter operating within the region, they are satisfying their residents' desire to shop at this grocery store. However, if for some reason the area is without a Harris Teeter, they can use this information to entice the store to open a location within the region. Businesses will be more likely to partner with communities if they are given data to support such a decision.

Note: *The brands mentioned in the What Reports may not be present in Montgomery County. Although they may not be present in the area, seeking similar brands will be beneficial.*

COMMUNITY TAPESTRY WHAT REPORT | RESIDENT PROFILE WHAT REPORT

Below you will find a summary of the What Report for Montgomery County's Regional Profile (Market 1). The following pages contain selected charts that highlight some of the overnight visitors' key preferences. For all of the results from the Tapestry What Reports, refer to the Final Report CD.

- ***Grocery:*** Likely to shop at IGA, Shop 'N Save, and Aldi. They are not likely to shop at Whole Foods Market.
- ***Internet:*** Likely to use to Internet from the home with a dial-up modem. They are infrequent users, likely using the Internet less than once a week..
- ***Leisure:*** Likely to be members of a veterans club or partake in birdwatching of woodworking.
- ***Listen:*** Likely to listen to country, auto racing, and college basketball.
- ***Read:*** Likely to hunting magazines as well as the comics and advertisements sections of the newspaper.
- ***Watch:*** Likely to watch Cops

COMMUNITY TAPESTRY WHAT REPORT | RESIDENT WHAT REPORT

Regional Profile 1 – Albany, Saratoga, Schenectady and Warren

Grocery	Index
Shopped at grocery store/6 mo: IGA	370
Shopped at grocery store/6 mo: Shop`N Save	322
Shopped at grocery store/6 mo: Aldi	263
Ground coffee/6 mo: Maxwell Hse Original (reg)	190
Shopped at grocery store/6 mo: Whole Foods Market	28

Listen	Index
Radio format listen to: country	210
Radio listening: auto racing	201
Listen to Radio: midnight - 6:00 am weekday	146
Radio listening: basketball (college)	144
Listen to Radio: midnight - 6:00 am weekend	143

Internet	Index
Connection to Internet from home: dial-up modem	250
Use Internet less than once a week	151
Spent on Internet orders last 12 months: <$100	140
Internet last 30 days: visited chat room	107
Internet last 30 days: played games online	101

Read	Index
Read fishing/hunting magazines	183
Read newspaper: classified section	173
Read newspaper: comics	151
Read newspaper: advertisements	144
Read newspaper: TV listings section	142

Leisure	Index
Member of veterans club	173
Did woodworking in last 12 months	165
Did birdwatching in last 12 months	162
Bought book at department store in last 12 months	158
Bought lottery ticket in last 12 mo: Instant Game	156

Watch	Index
HH has satellite dish: Dish Network	249
Watch Syndicated TV (M-F): Cops	233
Watched last week: CMT (Country Music Television)	230
Watched last week: Outdoor Channel	212
Watch early morning TV (M-F): The Early Show	202

Data includes national chains that may not be present in your region, but represent the type of consumer behavior likely.

COMMUNITY TAPESTRY WHAT REPORT | REGIONAL PROFILE 1 WHAT REPORT

Below you will find a summary of the What Report for Montgomery County's Regional Profile (Market 1). The following pages contain selected charts that highlight some of the overnight visitors' key preferences. For all of the results from the Tapestry What Reports, refer to the Final Report CD.

- ***Grocery:*** Likely to shop at Wegmans and Ship 'N Save, as well as purchase white wine in the last 6 months.
- ***Internet:*** Likely to use to internet from the library to purchase things like airline tickets, clothing, and track investments.
- ***Leisure:*** Likely to be members of charitable organizations, attend classical music performances, and partake in birdwatching.
- ***Listen:*** Likely to listen to classical music, news stations, and college basketball.
- ***Read:*** Likely to science magazines, airline magazines, and business sections of the newspaper.
- ***Watch:*** Regional residents are likely to watch the Golf Channel and The Office.

COMMUNITY TAPESTRY WHAT REPORT | REGIONAL PROFILE 1 WHAT REPORT

Regional Profile 1 – Albany, Saratoga, Schenectady and Warren

Grocery	Index
Shopped at grocery store/6 mo: Wegmans	228
Shopped at grocery store/6 mo: Shop`N Save	210
Shopped at grocery store/6 mo: Pathmark	197
Shopped at grocery store/6 mo: Giant	176
Drank white imported dinner/table wine last 6 mo	160

Listen	Index
Radio format listen to: classical	178
Radio format listen to: news/talk	169
Radio format listen to: public	167
Radio format listen to: classic hits	148
Radio listening: basketball (college)	138

Internet	Index
Used Internet in last 30 days: at school/library	197
Ordered on Internet/12 mo: airline ticket	158
Internet last 30 days: traded/tracked investments	156
Ordered on Internet/12 mo: clothing	149
Spent on Internet orders last 12 months: $500+	149

Read	Index
Read newspaper: editorial page	154
Read newspaper: business/finance section	140
Read newspaper: science & technology section	140
Read airline magazines	139
Read newspaper: travel section	139

Leisure	Index
Member of charitable organization	171
Did birdwatching in last 12 months	166
Attended classical music/opera performance/12 mo	165
Bought book at warehouse store in last 12 months	157
Member of business club	152

Watch	Index
Watched last week: Golf Channel	163
Watched last week: Travel Channel	140
Watch TV aired once/wk: NCIS	139
Watch TV aired once/wk: The Office	139
Watch on TV: golf	139

Data includes national chains that may not be present in your region, but represent the type of consumer behavior likely.

COMMUNITY TAPESTRY WHAT REPORT | REGIONAL PROFILE 2 WHAT REPORT

Below you will find a summary of the What Report for Montgomery County's Regional Profile (Market 2). The following pages contain selected charts that highlight some of the overnight visitors' key preferences. For all of the results from the Tapestry What Reports, refer to the Research Report CD.

- ***Grocery:*** Likely to shop at Shop 'N Save and Pathmark, purchasing things like coffee (instant or whole).
- ***Internet:*** Likely to order airline tickets or flowers online, as well as track investments and search for financial info.
- ***Leisure:*** Likely to be members of veterans clubs and active theater goers, attending things like classical music performance.
- ***Listen:*** Likely to listen to all news formats, as well as sports radio such as hockey and football.
- ***Read:*** Likely to read travel and computer magazines. They are likely heavy newspaper readers.
- ***Watch:*** Likely to watch the Gold Channel, MSNBC, and the office. They are also likely to own a digital video recorder.

COMMUNITY TAPESTRY WHAT REPORT | REGIONAL PROFILE 1 WHAT REPORT

Regional Profile 2 – Schoharie, Otsego, Herkimer and Hamilton

Grocery	Index
Shopped at grocery store/6 mo: Shop`N Save	279
Shopped at grocery store/6 mo: Pathmark	220
Shopped at grocery store/6 mo: Acme	216
Used unflavored whole coffee beans in last 6 mo	182
Used instant/freeze-dried coffee in last 6 mo	99

Listen	Index
Radio format listen to: all news	264
Radio format listen to: news/talk	201
Radio format listen to: public	201
Radio listening: ice hockey	164
Radio listening: football (college)	155

Internet	Index
Ordered on Internet/12 mo: airline ticket	217
Internet last 30 days: traded/tracked investments	216
Ordered on Internet/12 mo: flowers	209
Purchased item from amazon.com in last 12 mo	191
Internet last 30 days: obtained financial info	185

Read	Index
Read airline magazines	208
Read travel magazines	186
Read business/finance magazines	174
Read computer magazines	157
Heavy newspaper reader	155

Leisure	Index
Attended classical music/opera performance/12 mo	193
Gambled in Atlantic City in last 12 mo	191
Member of charitable organization	189
Went to museum in last 12 mo	188
Member of business club	184

Watch	Index
Watched last week: Golf Channel	206
HH has digital video recorder (DVR)	185
Watched TV aired once/wk: The Office	173
Watched last week: MSNBC	161
Watch on TV: tennis	155

Data includes national chains that may not be present in your region, but represent the type of consumer behavior likely.

COMMUNITY TAPESTRY WHAT REPORT | PROFILE COMPARISONS

Listen	Index
Radio format listen to: country	210
Radio listening: auto racing	201
Listen to Radio: midnight - 6:00 am weekday	146
Radio listening: basketball (college)	144
Listen to Radio: midnight - 6:00 am weekend	143

Montgomery Residents

Listen	Index
Radio format listen to: classical	178
Radio format listen to: news/talk	169
Radio format listen to: public	167
Radio format listen to: classic hits	148
Radio listening: basketball (college)	138

Regional Profile 1

Listen	Index
Radio format listen to: all news	264
Radio format listen to: news/talk	201
Radio format listen to: public	201
Radio listening: ice hockey	164
Radio listening: football (college)	155

Regional Profile 2

ONLINE BRAND MONITORING STUDY

Purpose

Over the years, brands (of products, of companies, of communities) have transformed from something that identified products to something people identified with. Recently, the evolution of technology, especially internet search engines, blogs, and social media has enabled widespread conversations to take place about brands in online consumer communities. Understanding how these online conversations contribute to reputation is just as important as understanding in-person conversations taking place between consumers.

The purpose of the Online Brand Monitoring Study is to gain understanding of the online reputation ("conversations," or content generated and consumed by people) centered around Montgomery County on social media platforms. The Online Brand Monitoring Study reveals where online conversations are taking place, the authors of such content, top keywords used online, and overall sentiment of the community and assets within the community.

In the online space, consumer behavior is content, either created or consumed. Therefore understanding online content (i.e., conversations) about a brand allows us to understand consumer behavior around that brand, at least the consumer behavior that is occurring online. And because technology's evolution has led to new channels, networks, platforms and applications, it has also created an equal amount of new opportunities for understanding and engaging with consumers.

ONLINE BRAND MONITORING STUDY

Methodology & Results

Leveraging methods that combine the analytical power of online measurement and monitoring tools, the Online Brand Monitoring Study examines social media content from a specific date and time (February 26, 2014). By examining social media platforms, the Online Brand Monitoring Study identifies authors, online influencers, and the content being generated around Montgomery County.

Online behavior is organized into five discrete types: Search, Visit, Mention, Join, and Engage. These behaviors are monitored on the following platforms:

- Blogs (Livejournal, Typepad, etc)
- Microblogs (Twitter, Plurk, Identi.ca, etc)
- Video/Photo Sharing (YouTube, Flickr, etc.)
- Social Network (Ning, Facebook, LinkedIn)

ONLINE BRAND MONITORING

Keywords Searched

- Mohawk River
- Montgomery County Business Development Center
- Shuttleworth Park
- Kateri Shrine
- National Shrine of North American Martyrs
- Revolutionary War + Montgomery County
- CEO Roundtable
- Riverlink Park
- Florida Business Park
- Glen Canal Business Park

Terms To Know

- Strength – the likelihood that your brand is being discussed in social media
- Sentiment – the ratio of positive to negative mentions
- Passion – the likelihood that individuals talking about your brand will do so repeatedly
- Reach – the measure of the range of influence (number of unique authors divided by total number of mentions)

CONSUMER AWARENESS & PERCEPTION STUDY

Purpose

The purpose of this study is to gain insight into consumer awareness, visitation and perceptions of Montgomery County. The study was conducted in the within New York and divided into regions. The survey measures:

- Overall top-of-mind perceptions of Montgomery County and immediate competitors
- Consumer visitation trends (frequency and nature of visitation)
- Consumer visitation drivers (business, leisure, friends, and family)
- Strengths and weaknesses of Montgomery County with identified community attributes
- Measurements of Montgomery County quality of life indicators
- Measurement of Montgomery County strengths and weaknesses as a place to do business

Methodology & Results

An internet study was conducted among respondents in Albany (100 respondents), Syracuse (100 responses), and Utica-Rome (100 responses). Questions relevant to both Montgomery County and Fulton County will be included in a future regional BrandPrint report.

A total of 300 surveys were collected allowing for a margin of error +/- 5.65 at the 95% confidence level. 371 respondents were terminated from the survey, resulting in a termination rate of 54%.

Note: Additional questions regarding the combined region of Fulton and Montgomery Counties were asked. Those results are shared under cover of a separate, regional report.

CONSUMER AWARENESS & PERCEPTION STUDY

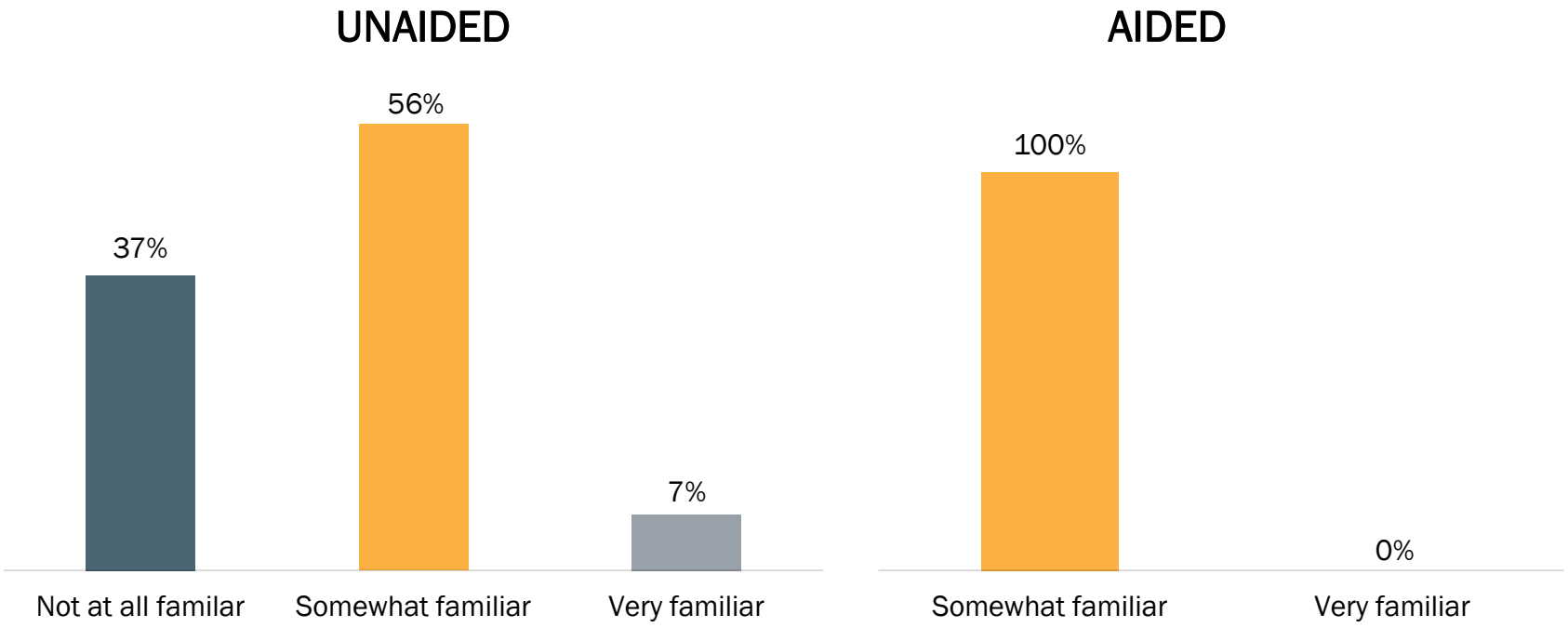
We also examined the responses for several questions relative to the particular responses to other questions in this study. This process of cross-tabulation is a type of analysis that looks at the variability of a characteristic between two or more groups. In other words, it compares opinions, behaviors, perceptions, etc. between different types of people (respondents). Cross tabulating data reveals much more detailed information than simply presenting the means, or averages, of an aggregated set of data. We have shared the most compelling cross-tabulations in the following pages. We present the question and responses in aggregate form followed by the detailed cross-tabulations.

See Appendix C on the Report CD for the complete CAP Study results.

CAP Study

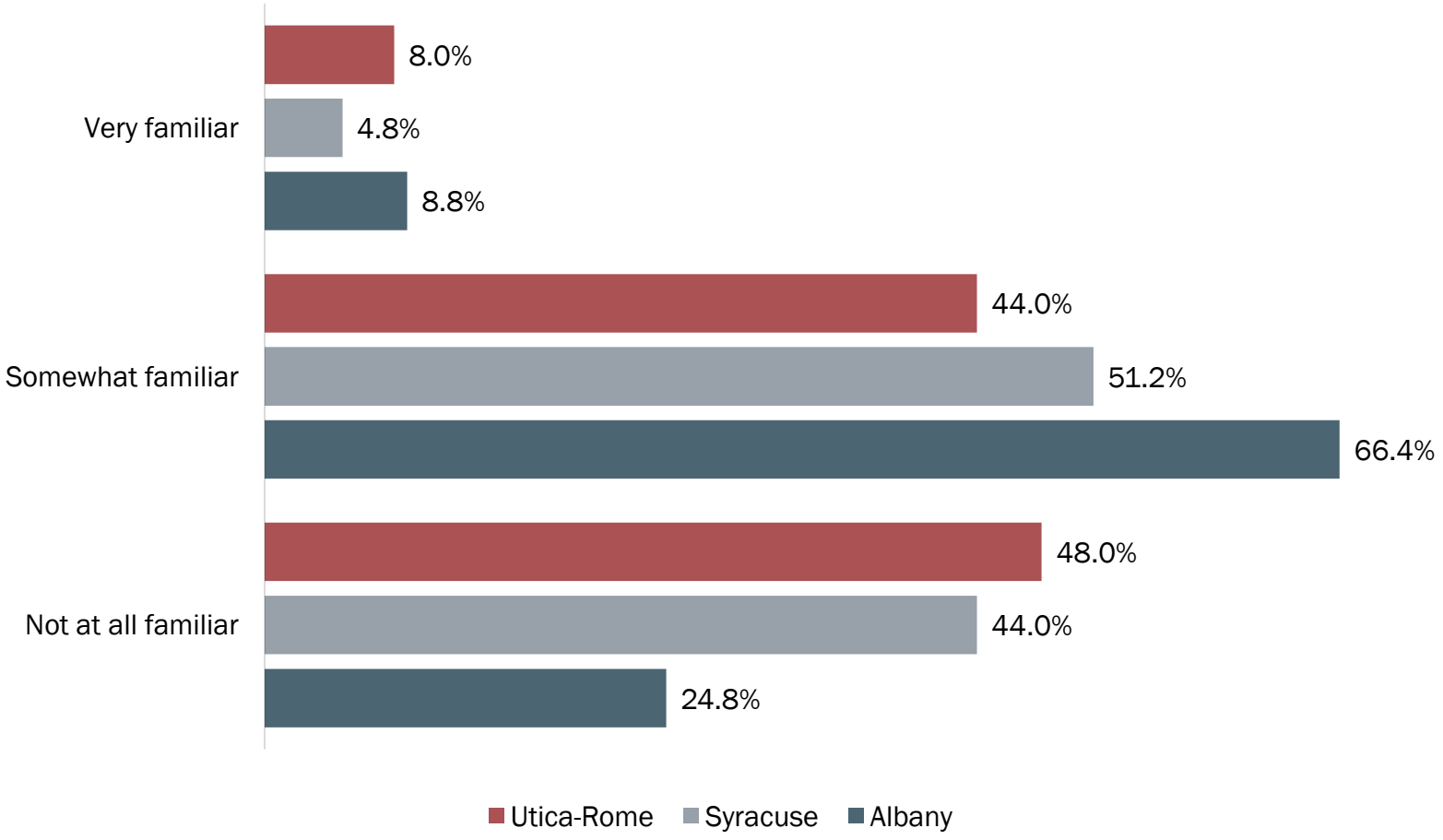
FAMILIARITY WITH MONTGOMERY COUNTY

- Lack of familiarity with Montgomery County was the terminating factor for the survey.
- Without the aid of a map, 58% of respondents were Somewhat Familiar with Montgomery County and 7% were Very Familiar.
- Of the 37% initially Not At All Familiar with Montgomery County, once viewing a map of the area, 100% were Somewhat Familiar with the area.



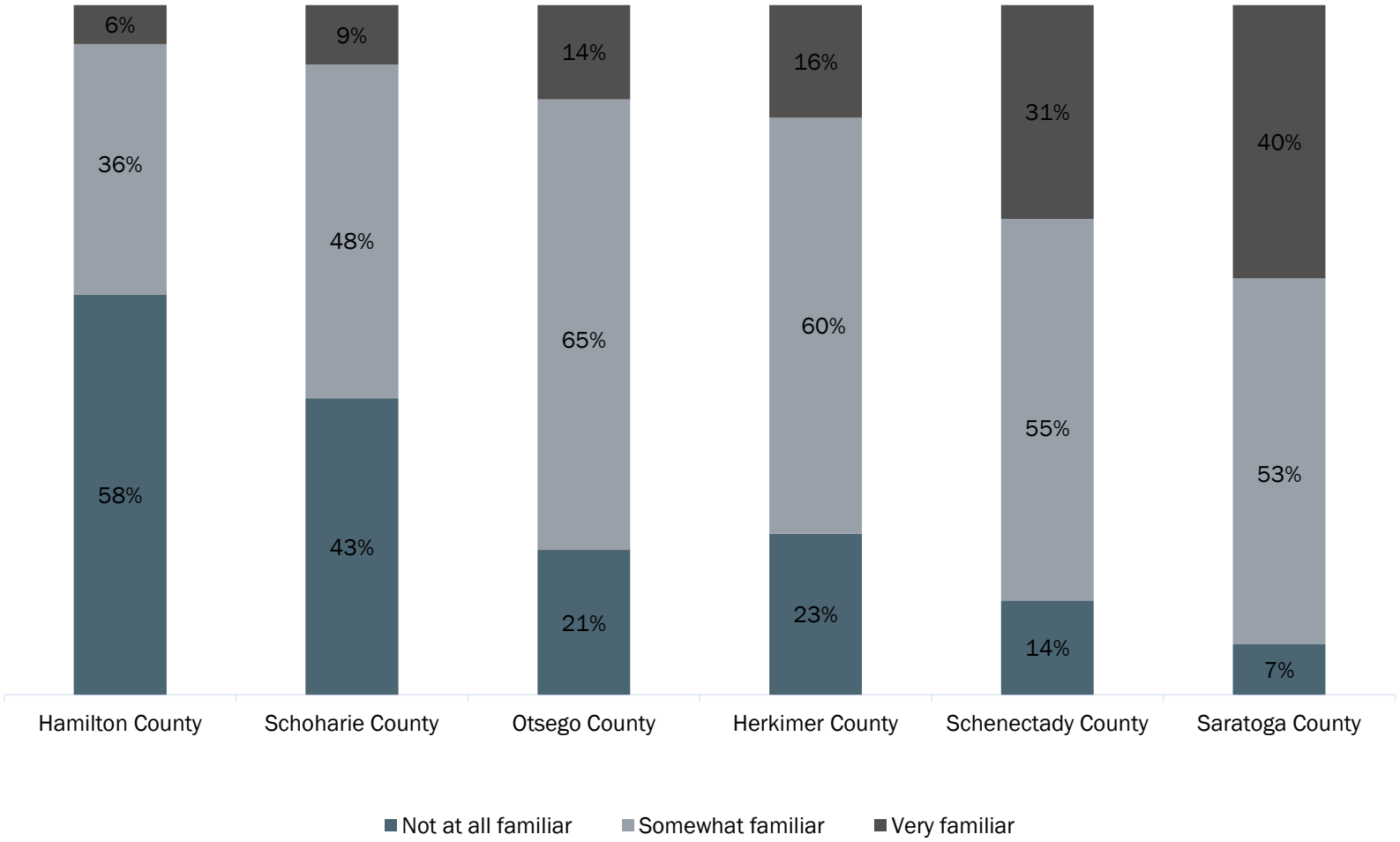
CAP Study

How familiar are you with Montgomery County?



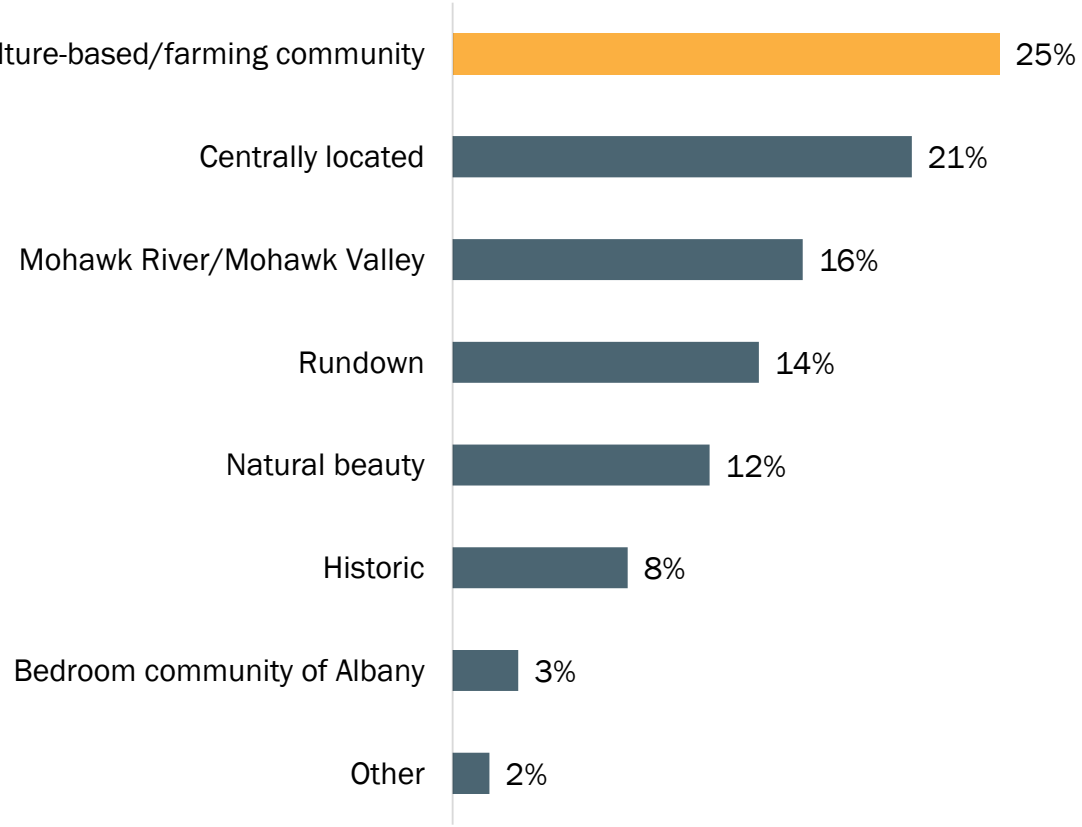
CAP Study

NEIGHBORING COMMUNITY FAMILIARITY



CAP Study

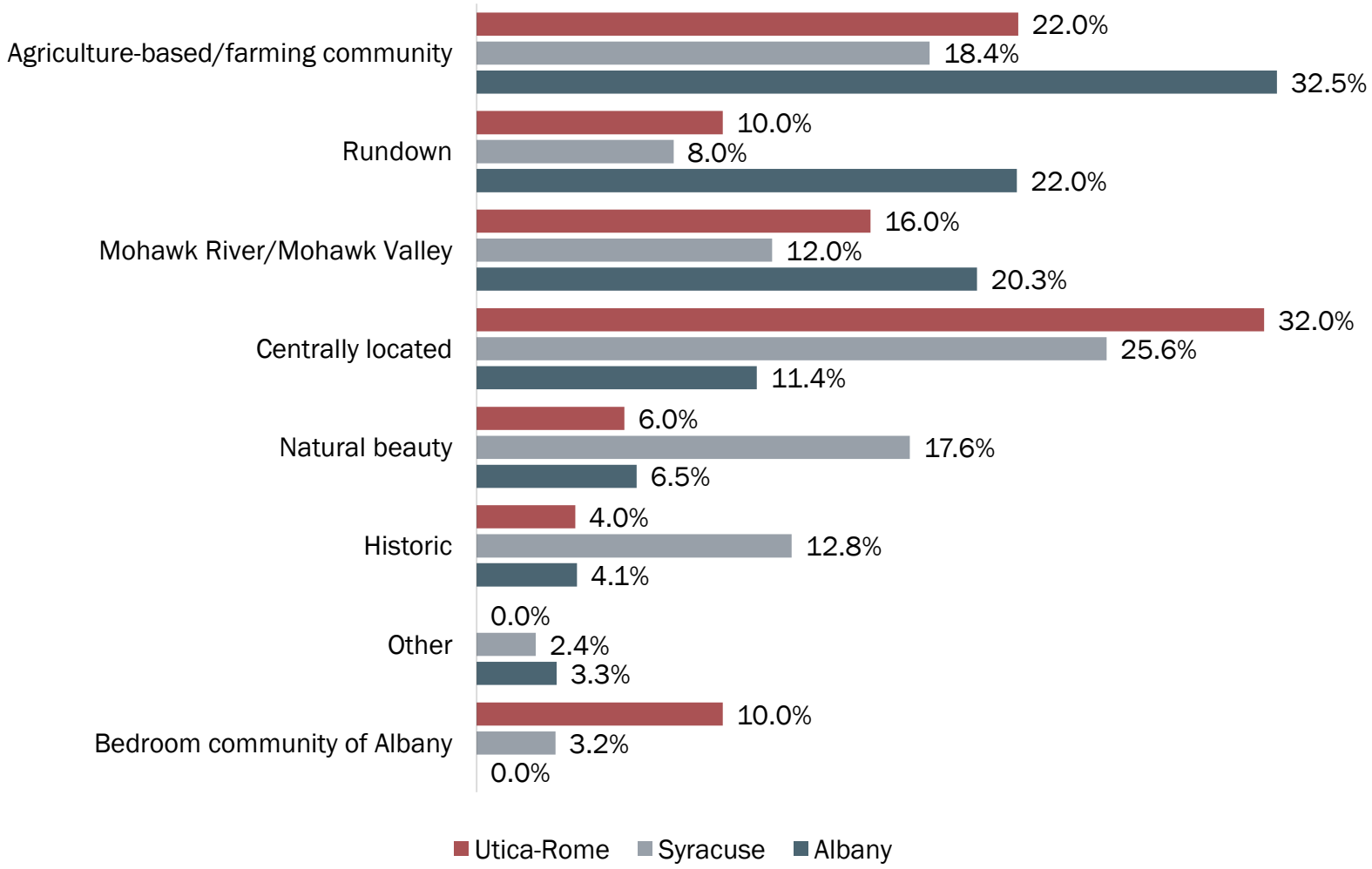
Which of the following most closely fits your perception of Montgomery County?



Other: I don't know, flood damage

CAP Study

Which of the following most closely fits your perception of Montgomery County?



CAP Study

NEIGHBORING COMMUNITY PERCEPTIONS

When you think of the following communities, what comes to mind?

Fulton County

- Manufacturing
- Nothing
- Country, farms

Montgomery County

- Rural
- Car racing, Fonda Speedway

Hamilton County

- Outdoor recreation
- Adirondacks
- Natural beauty

Herkimer County

- Diamond mines
- Country, farms
- College

Otsego County

- Baseball, Hall of Fame
- Cooperstown

Schoharie County

- Rural, farming
- Floods

Saratoga County

- Saratoga Racetrack
- Saratoga Performing Arts Center

Schenectady County

- GE
- Proctors

CAP Study

DESCRIBING MONTGOMERY COUNTY

What is the single greatest advantage Montgomery County has over other communities?

- I don't know
- Accessibility
  - *"Accessibility to the Thruway."*
  - *"Accessibility to Albany."*
  - *"Close to the Adirondacks."*
- Agricultural and rural qualities
  - *"Country living with open space."*
  - *"Local farms and working people who like to be at the foothills of the Adirondacks."*

CAP Study

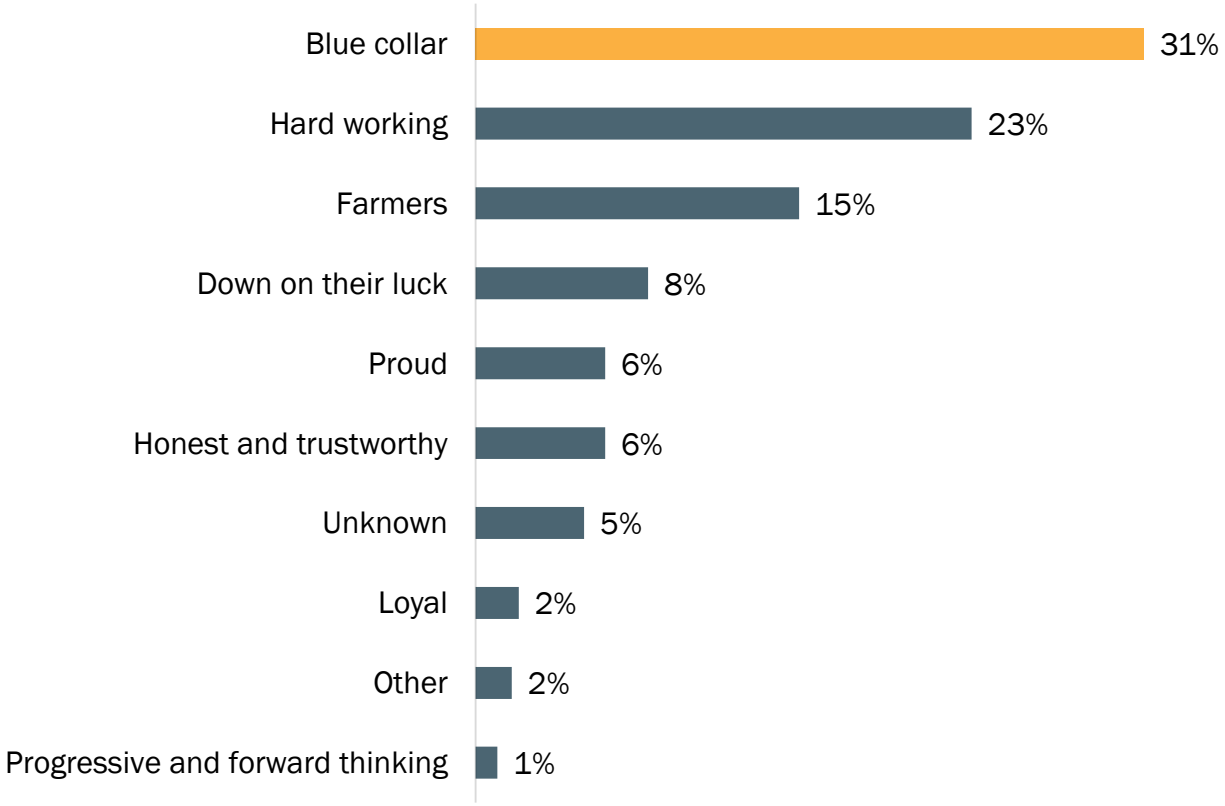
DESCRIBING MONTGOMERY COUNTY

What missing in Montgomery County?

- Businesses and jobs
  - *"A thriving economy."*
  - *"Businesses that could help the economy."*
  - *"Industry to provide better wage scales."*
- I don't know
- A destination attraction
  - *"A big draw."*
  - *"A recognizable name or landmark."*

CAP Study

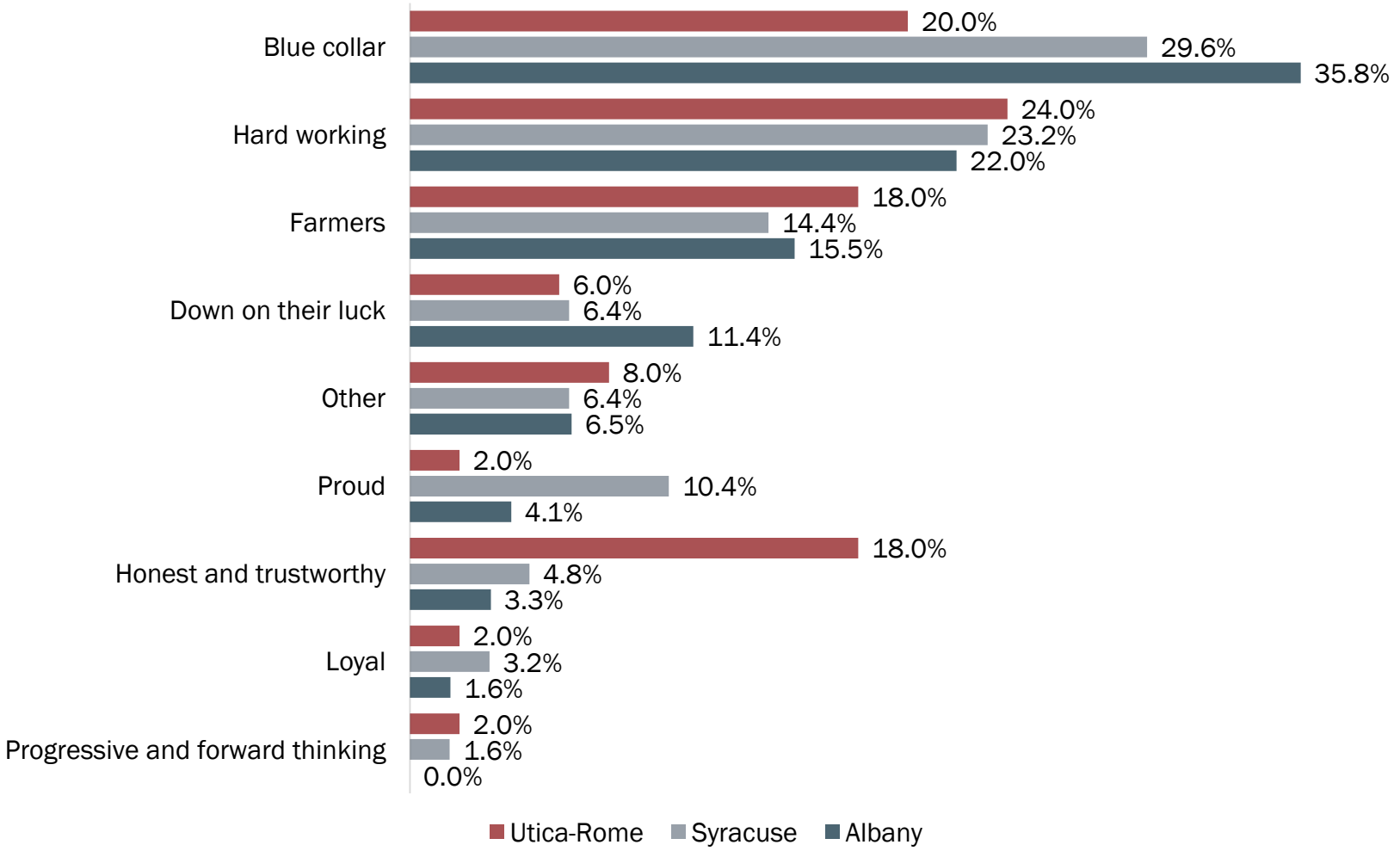
What word or phrase best describes the people who live in Montgomery County?



Other: Poor, losing population density, diverse

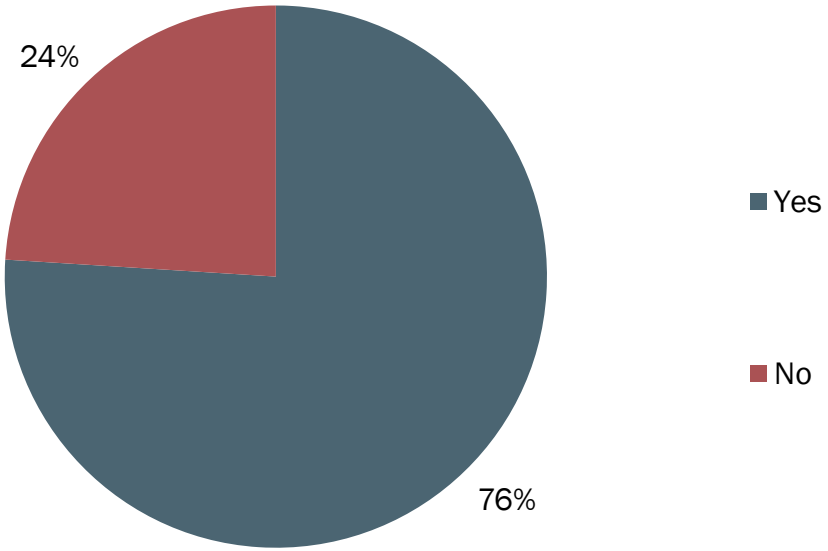
CAP Study

What word or phrase best describes the people who live in Montgomery County?



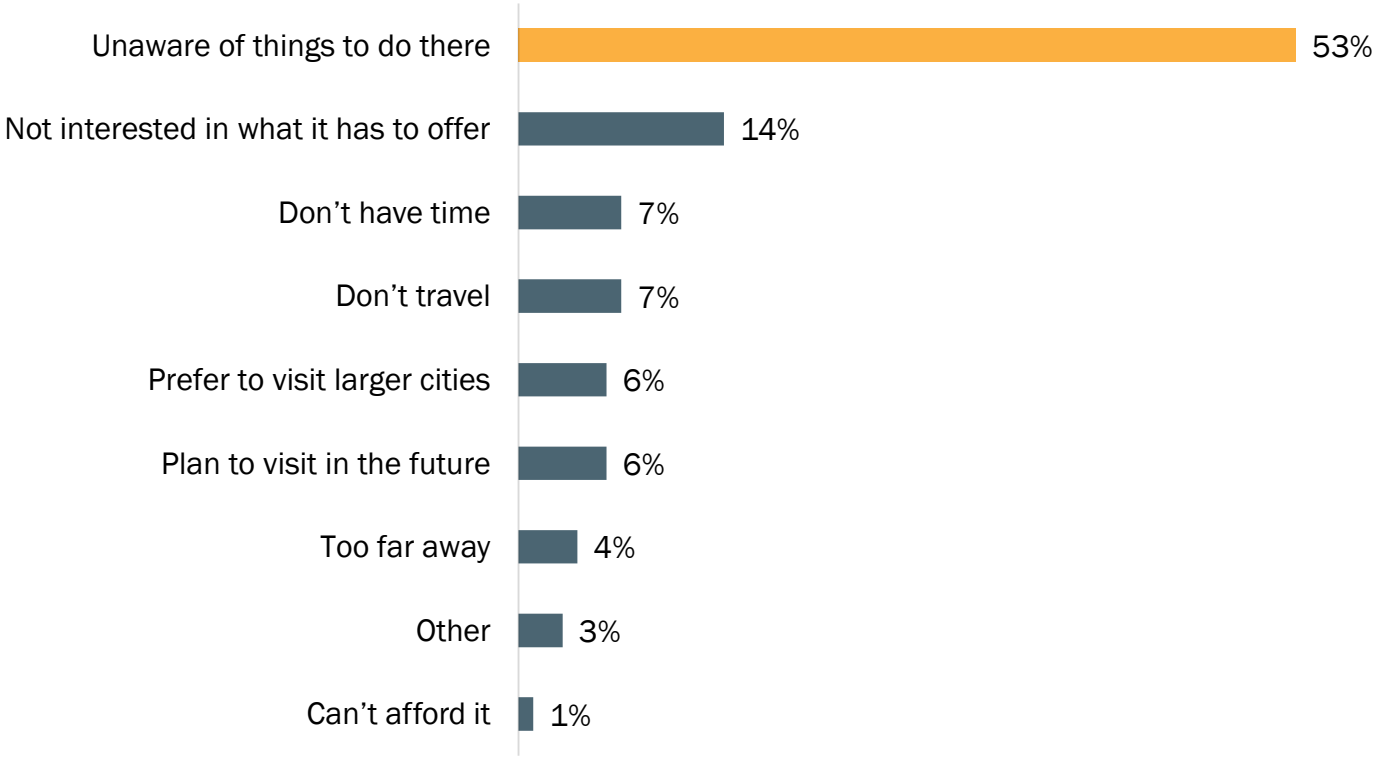
CAP Study

Have you ever visited or been to Montgomery County?



CAP Study

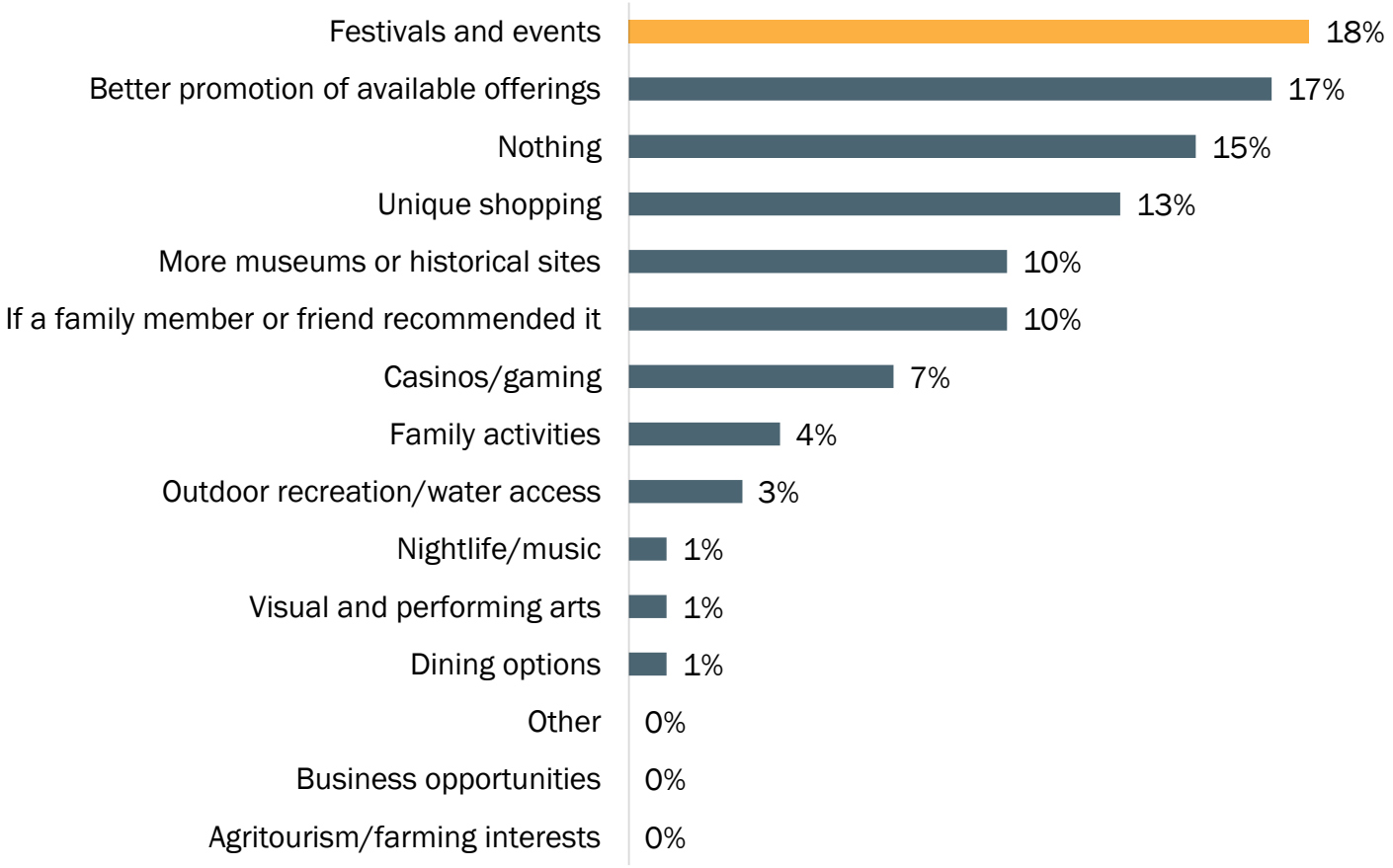
Why have you not visited Montgomery County?



Other: No reason to travel there

CAP Study

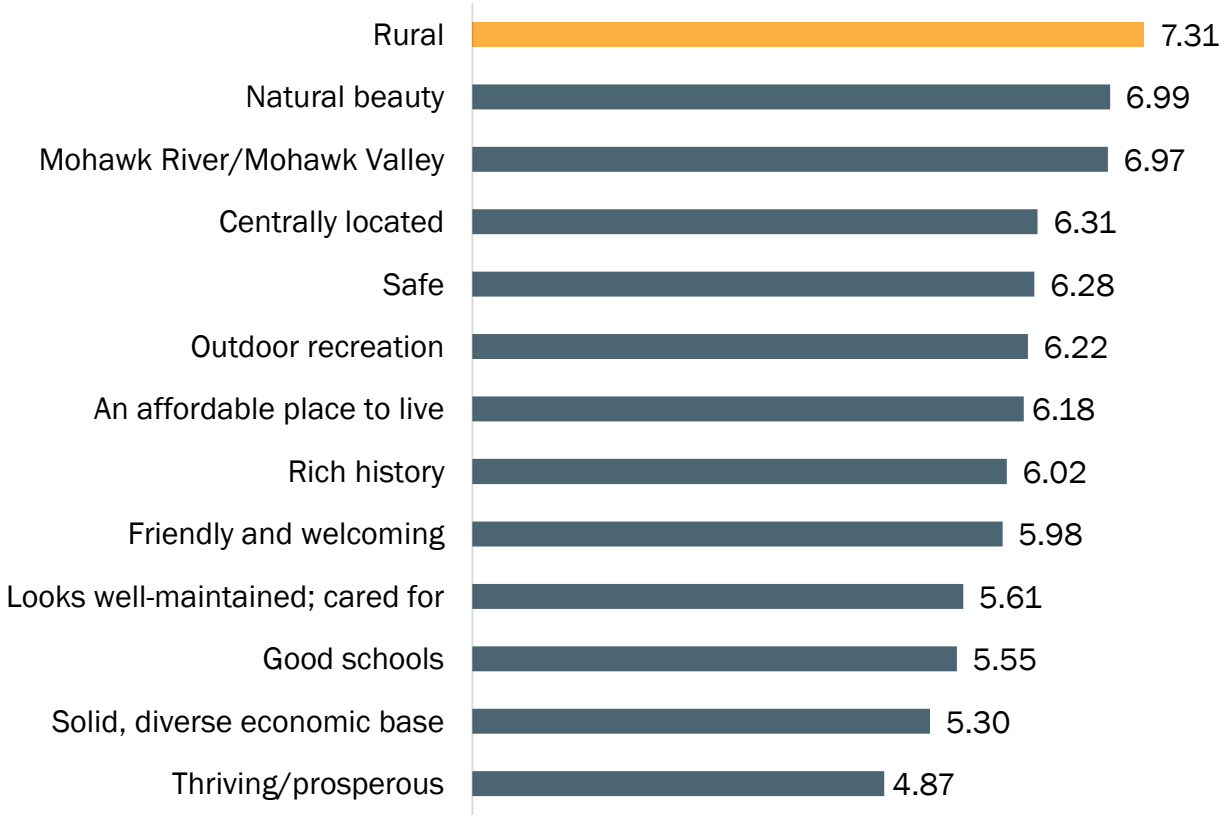
What would make you more likely to visit Montgomery County?



CAP Study

Based on your perceptions of Montgomery County, NY, how would you rate the following descriptions on a scale of 1 to 10?

With 1 being "does not match" and 10 being "an exact description."

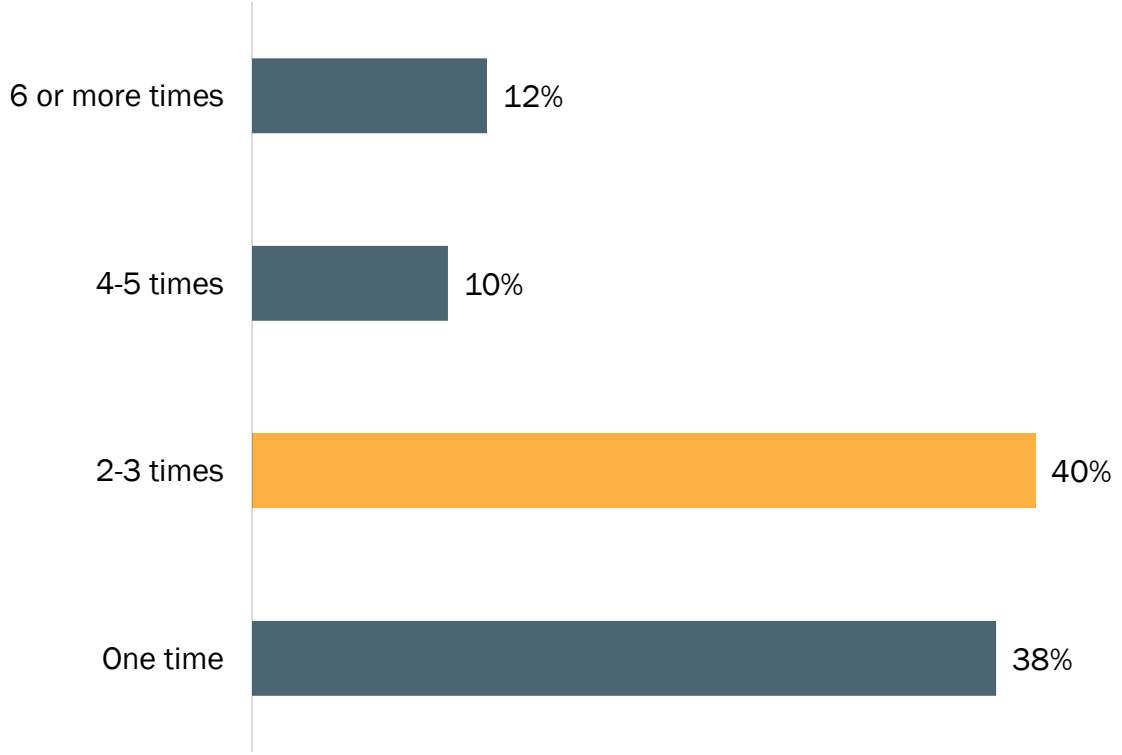


CAP Study

The following questions were asked of respondents who indicated they **have** visited Montgomery County.

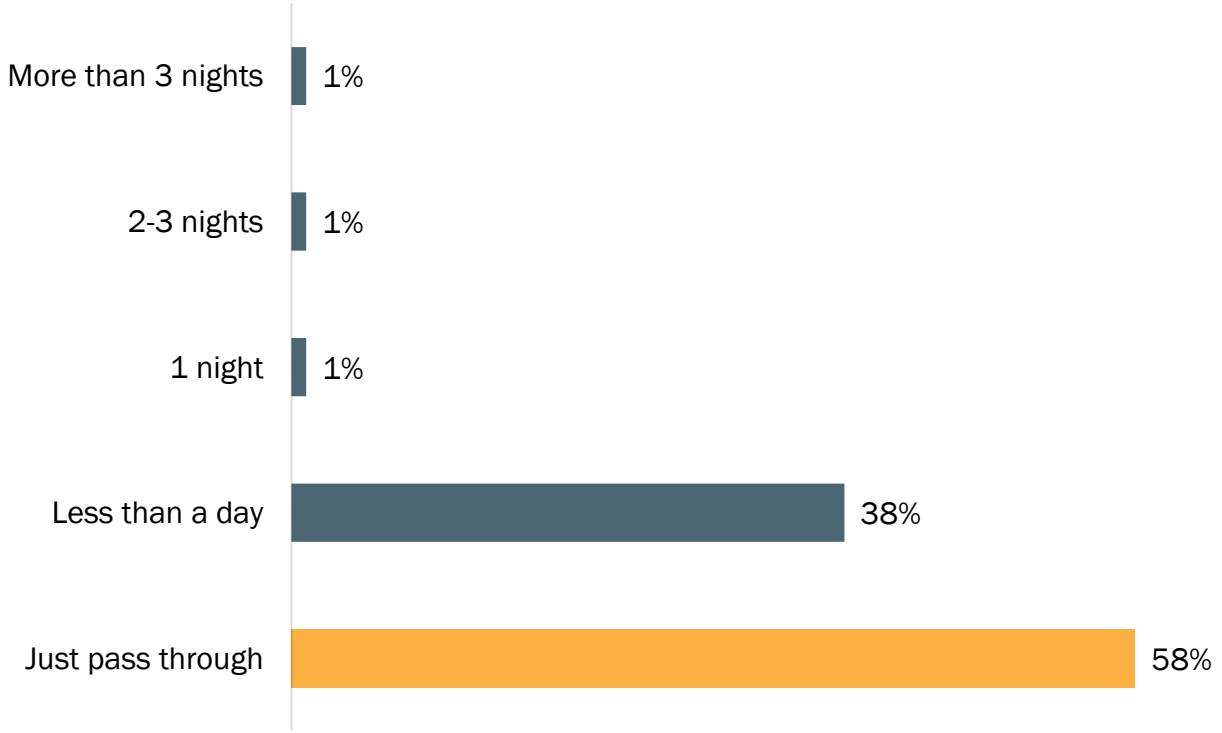
CAP Study

How many times have you visited Montgomery County in the past three years?



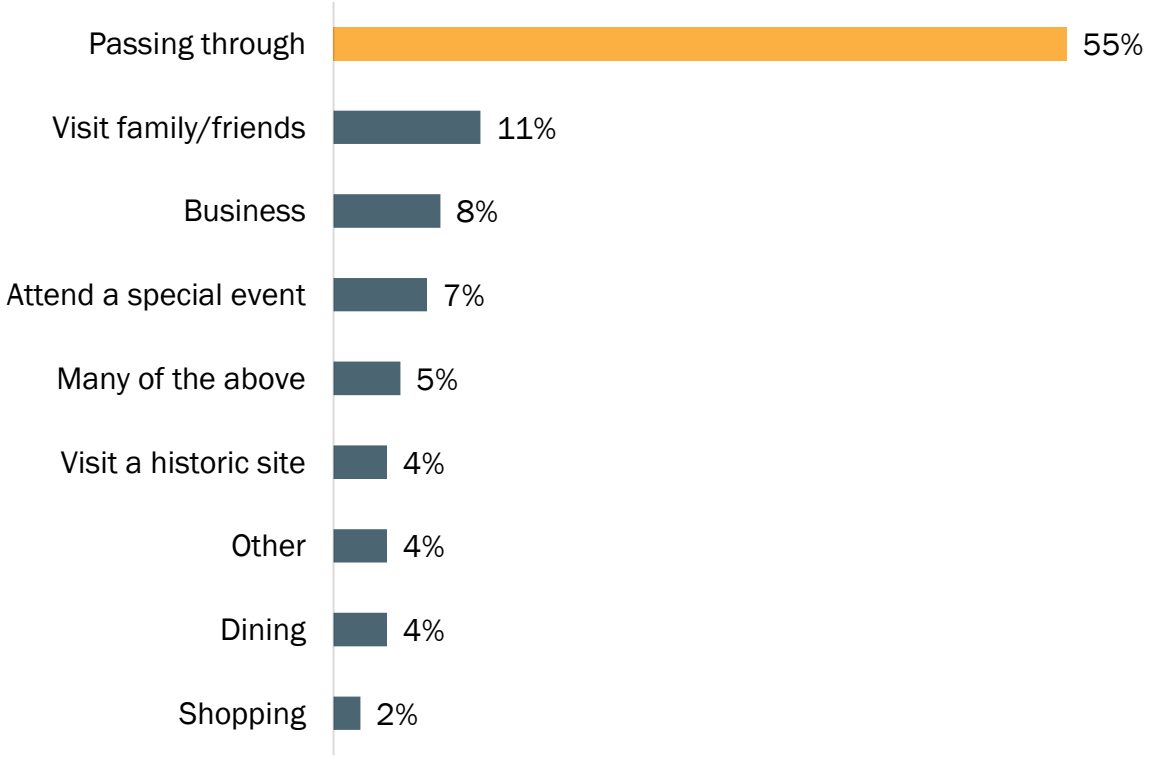
CAP Study

On average, how much time do you spend in Montgomery County when you visit?



CAP Study

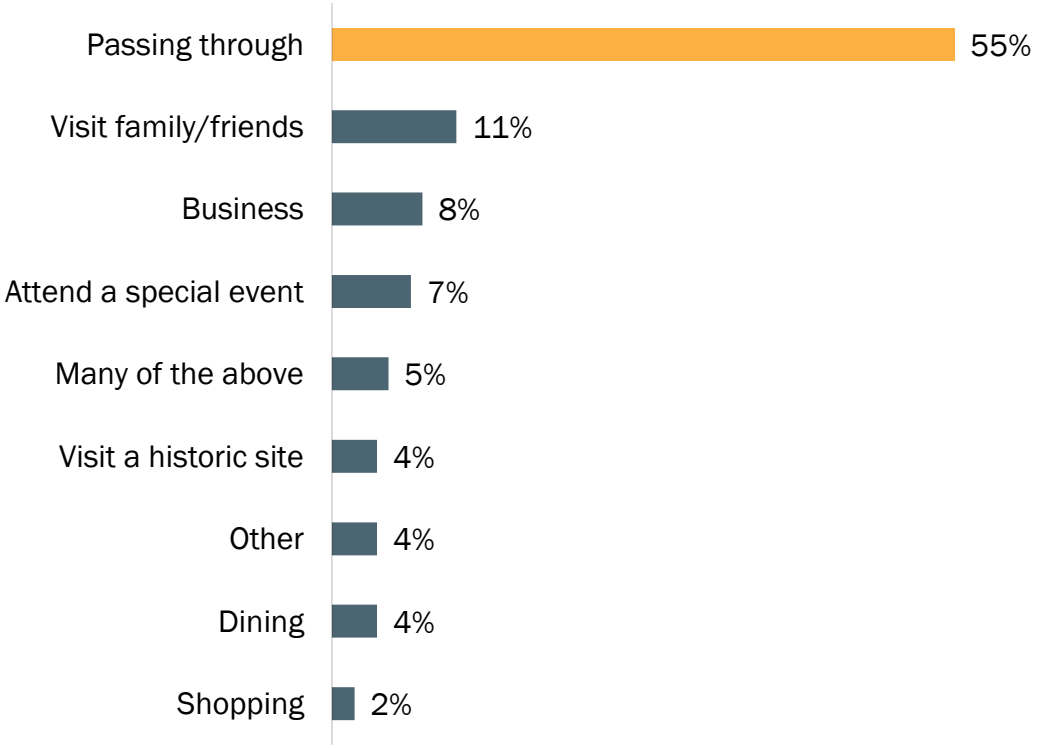
What was the primary purpose or main reason you visited Montgomery County on your most recent visit?



Other: undisclosed

CAP Study

While you were visiting Montgomery County, which of the following did you do in addition to the primary purpose of your trip? Choose all that apply.



Other: undisclosed

CAP Study

TRIP ACTIVITY FOLLOW UP

You mentioned you were passing through. Where was your final destination?

- Albany
- Saratoga/Saratoga Springs
- Buffalo

You mentioned you visited a historic site. What site did you visit?

- Historical Society Museum
- Katerina Shrine
- Auresville Shrine

You mentioned you attended a special event. What special event did you attend?

- Special Olympics
- A wedding
- A concert
- Latin festival

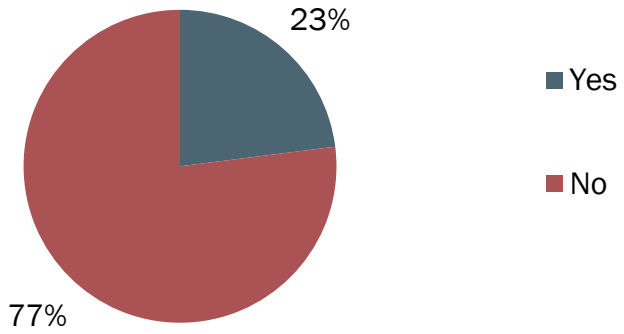
CAP Study

PERCEPTIONS

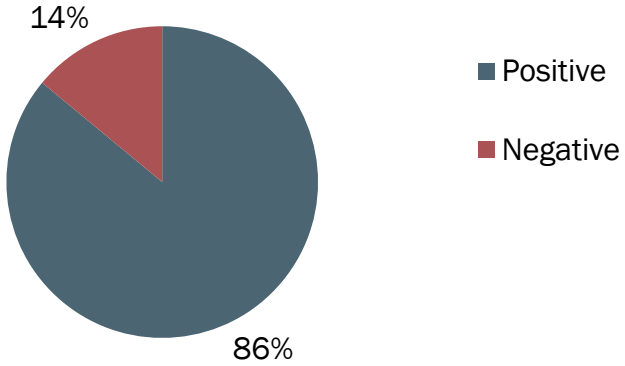
What was your perception of Montgomery County before you visited?

- *"I didn't have any perception of the area."*
- *"I assumed it was all just farm land."*
- *"Natural beauty with pockets of extreme poverty."*
- *"Just a cut through."*
- *"Rural, post-industrial, a bit rundown."*

Did your perception of Montgomery County change once you visited the area?



Did your perception change in a positive or negative way?



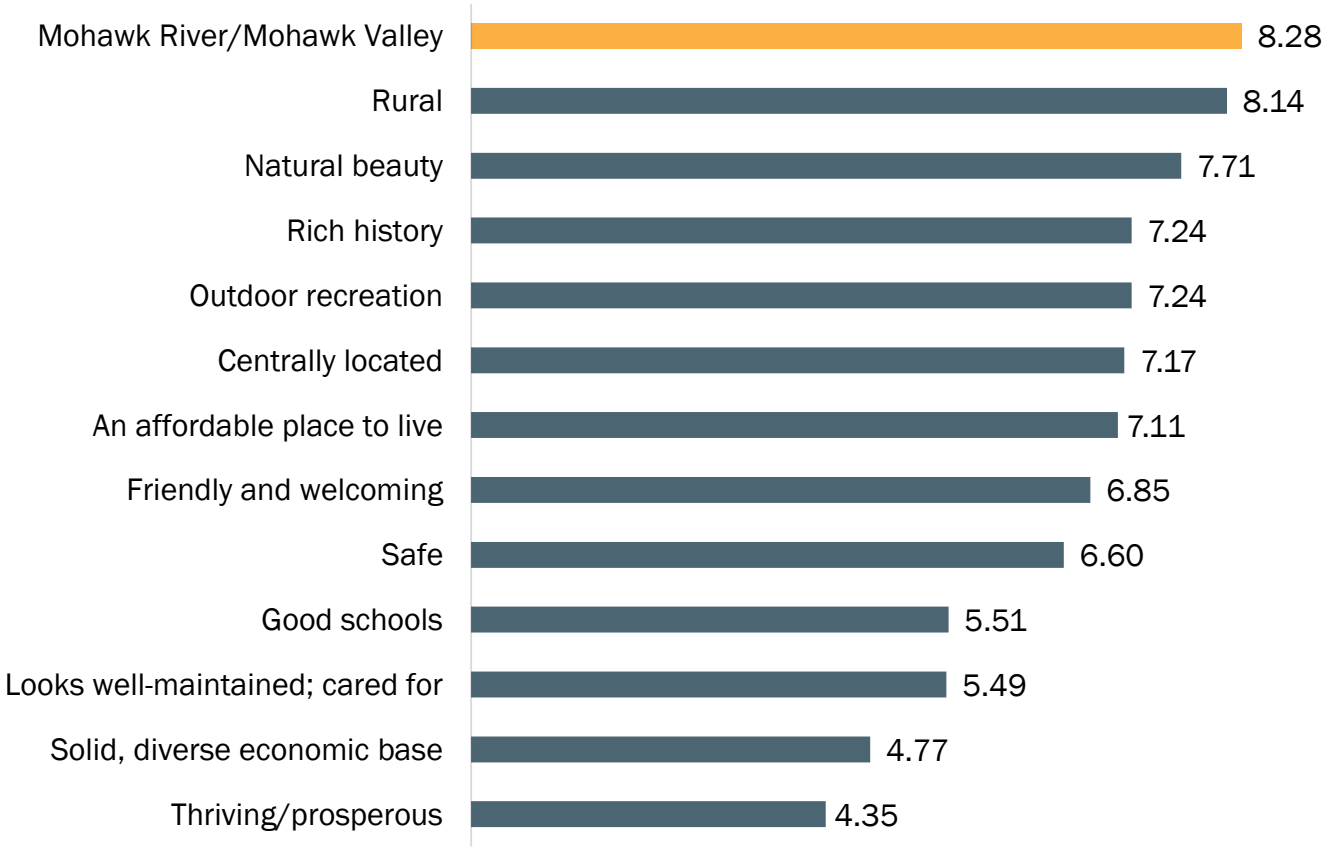
What changed your perception?

- *"I love that each small community has its own personality with mom and pop restaurants and stores."*
- *"Rundown, former manufacturing buildings, now abandoned. Very few people. Old towns, not upgraded."*
- *"The people were so friendly."*

CAP Study

Based on your past experiences, how would you rate the following attributes in Montgomery County using a scale of 1-10?

Where 1 is "poor" and 10 is "excellent."



CAP Study

Based on your experience conducting business in Montgomery County, how would you rate the following business attributes of the community using a scale of 1-10?

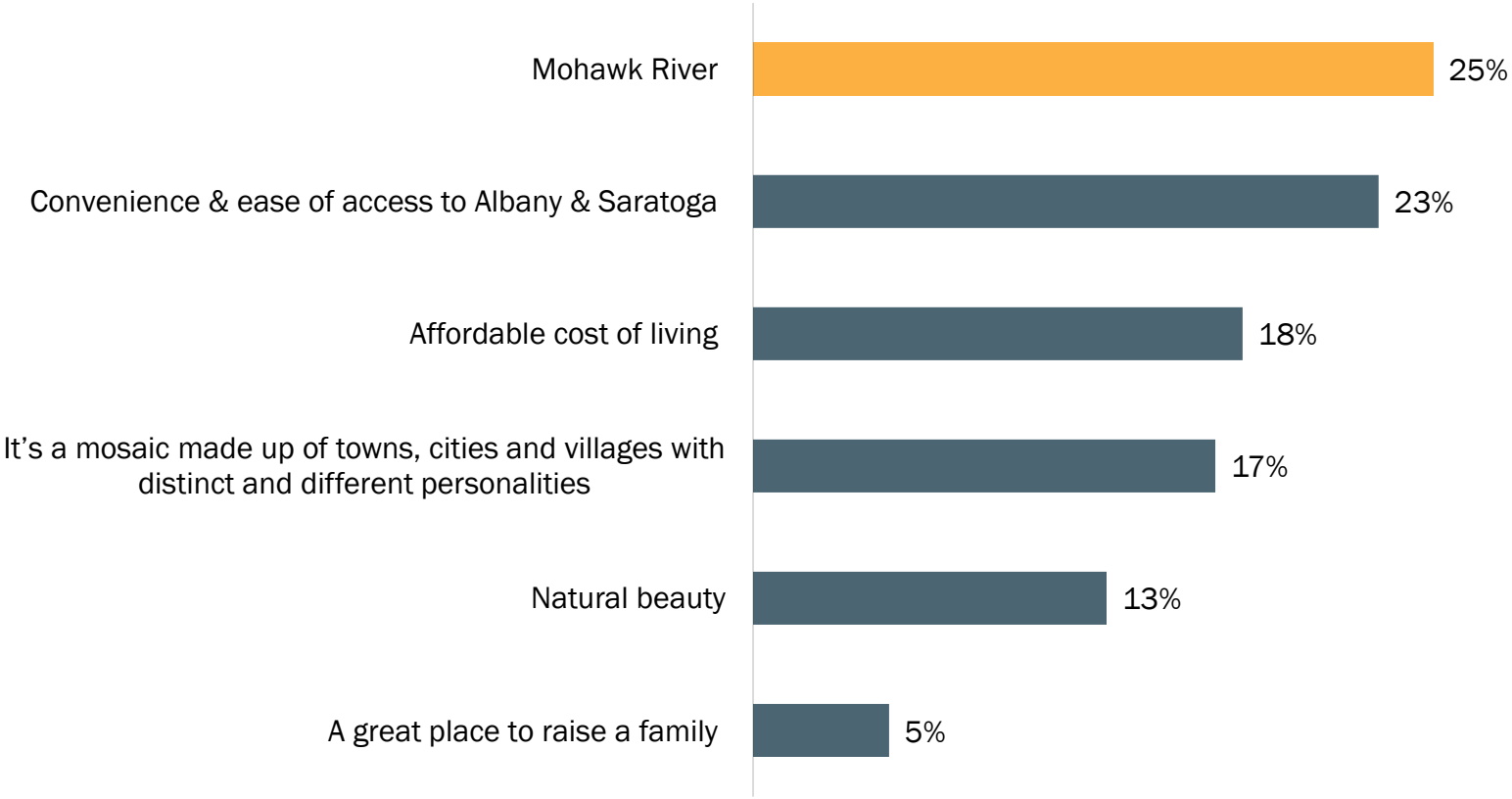
Where 1 is "poor" and 10 is "excellent."

CAP Study

The following questions were asked of **all** respondents.

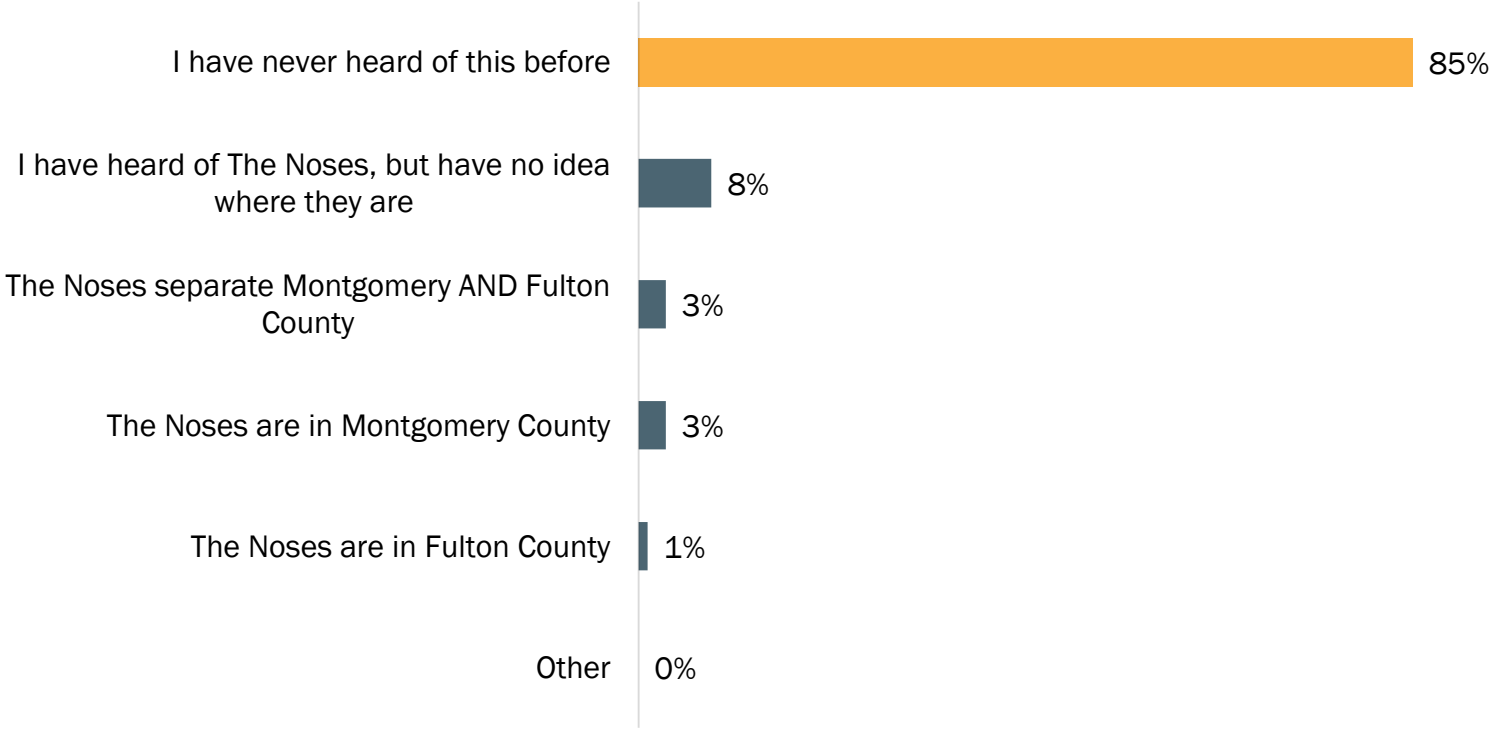
CAP Study

What is most important to Montgomery County's identity?



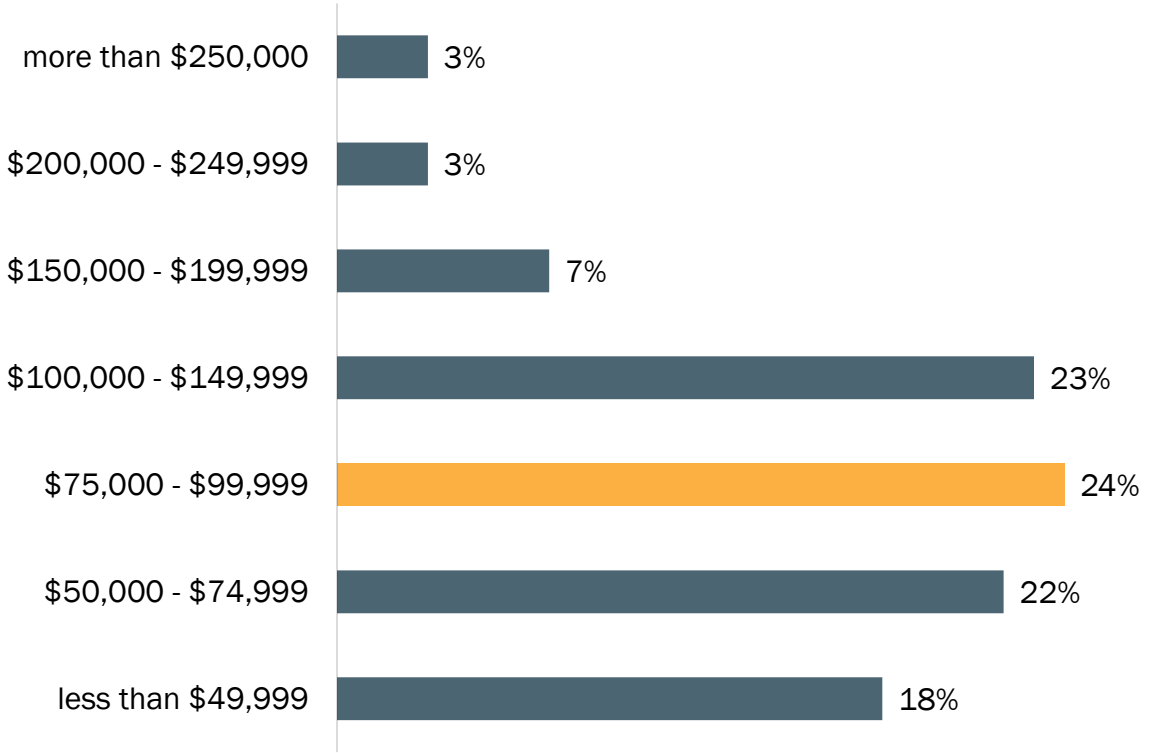
CAP Study

"The Noses" are a natural break in the Appalachian Mountains which served as a "Gateway to the West" for northern travelers passing through the area. Please answer which best describes your knowledge of this geographic landmark.



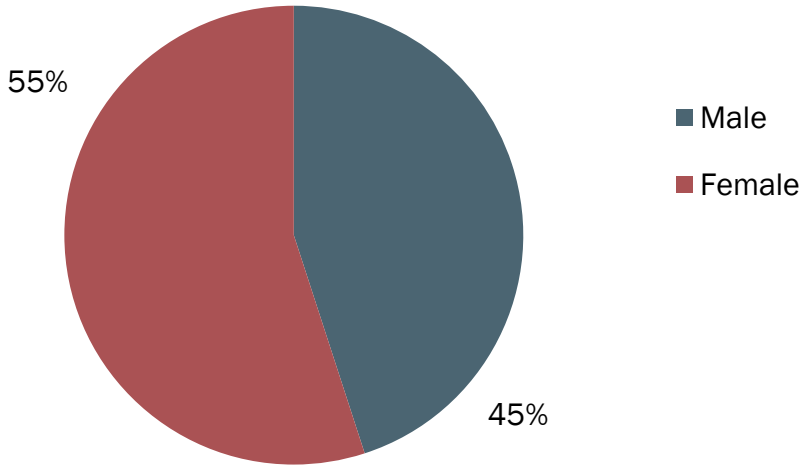
CAP Study

Which of the following levels matches your total household income?



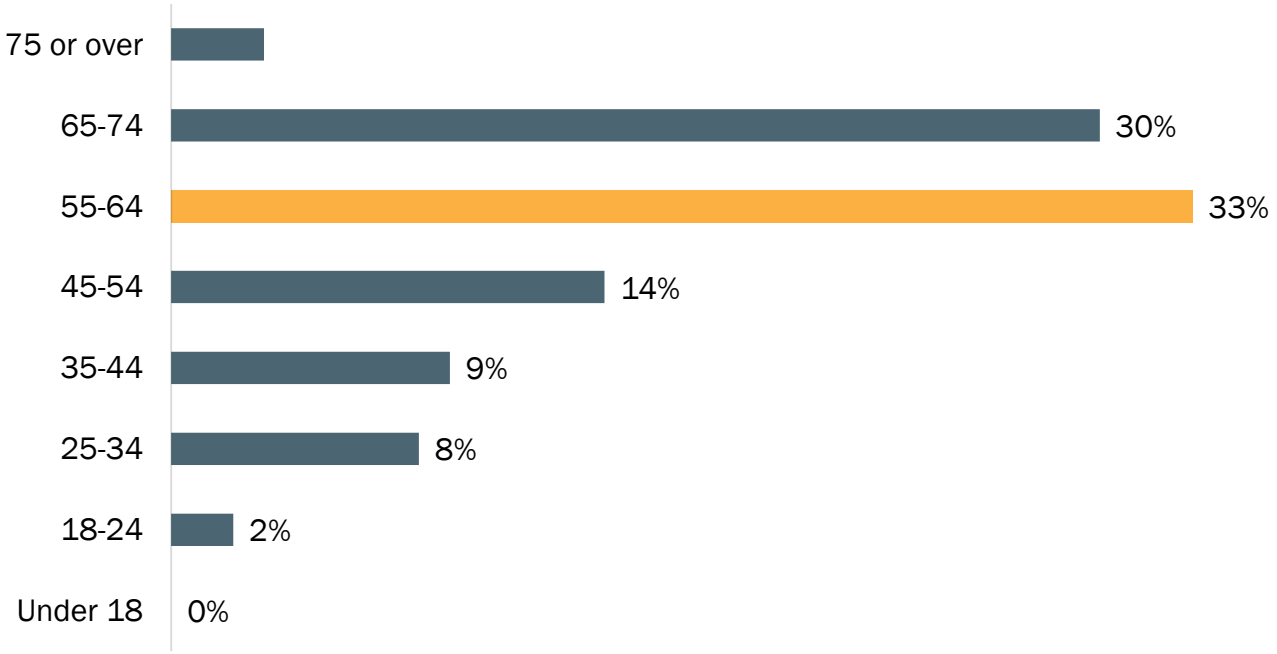
CAP Study

What is your gender?



CAP Study

Which of the following includes your age?



PERCEPTION STUDY

Purpose

The purpose of the Perception Study is to gain an in-depth understanding of the brand perceptions of Montgomery County among important target audiences. What do these constituents of the brand have to say about the area as a place to visit?

Methodology & Results

North Star consultants conducted perception interviews via telephone. The targeted audiences included competitor communities, state level economic development professionals, business owners, developers, tourism officials and regional partner agencies. Questions were phrased to gather qualitative information. Following this page is a summation of insights from these conversations.

Perception Study

- *"It has become ingrained into the society that kids need to move on to find better opportunities. We have to change that."*

- *"The Mohawk River is a huge asset. Schenectady has capitalized on the river and recreation and that hasn't happed in Montgomery County."*

- *"If you have a vision and the ability to own and operate a business, Montgomery County is unmatched. Labor costs and rents are far better than Albany or larger cities. My family has liquor stores in NJ paying cashiers $10-15 bucks an hour, up here you're paying $15 an hour for skilled labor."*

- *"A County Supervisor will be a good opportunity to brand the county. The right leader will be a good way to promote the county." (prior to election)*

Perception Study

- *"The unifier is that the more critical the outside perception, that fires them up. They thrive on that 'we'll prove them wrong' attitude."*

- *"Montgomery County can't get out of their own way. There is too much in-fighting and turf wars amongst the towns. When the government is the main employer it causes problems. The members of public employee unions are very powerful. They are the only middle class that remains."*

- *"The Arkell museum is great. I go to Mass at the Shrine which could be a much more phenomenal tourist attraction. I look off the thruway and see all the empty Beechnut buildings and think that would be a phenomenal site for an outlet mall."*

- *"When people don't get the right information they fill in the blanks themselves."*

Perception Study

- *"Montgomery County is right in the middle of nothing and everything."*
- *"They are caught in the past with many people focused on what they used to be and not forward looking. An example is when Beechnut went out they wanted it to be exactly the same. Couldn't focus on Richardson Candy being there … wanted to be back at Beechnut."*
- *"When you go to Albany you would think you would have to book a flight! I think there is a tremendous opportunity as a bedroom community for Albany."*
- *"I think my biggest surprise was the lack of movement forward, giving the resources that I think that the county has. I think the county has a tremendous amount of potential. But the residents don't see it. I think the residents long for what* ***was*** *and that keeps them from focusing on* ***what could be****."*

INSIGHTS

Where The Brand Should Be

The Insights portion of this process comprises the emotional and subjective sparks – gleaned from our intellectual and objective research – that point like a compass to the strategic position that best supports Montgomery County's goals.

Montgomery County's primary goals include sharing a better understanding of what Montgomery County has to offer from a business and tourism perspective and with that understanding, increase community interest in the promotion of the area.

With these objectives in mind, we need to focus the branding strategy in the markets that will be most receptive to the brand communications. Furthermore, the brand strategy must differentiate Montgomery County in the state and increase awareness and regard within the community and beyond. This differentiation must remain in keeping with the personality perceived by stakeholders, residents and visitors.

Using the research gathered as fodder for thought, our insights come from asking numerous, provocative questions:

- What emotional attachments can the brand hold for the consumer?
- How does the brand fit into his or her lifestyle?
- How can the brand best be used to redefine perceptions?
- How can the brand stand out in the marketplace?

These insights will become the framework of our creativity on behalf of the brand.

Throughout the research we listened for repetition. It's a good thing because it helps us make sure we're focused in the right direction.

Throughout our research, we heard a lot about:

- The history of Montgomery County
- The natural beauty
- The central location
- The connections to the Mohawk Valley
- The Mohawk River
- A rural and agricultural perception

Let's review these assets and put them into a broader context – including the research but also strategically into context for Montgomery County.

Let's start with history:

Montgomery County is rich in history. That history includes

- Stories about the struggles between early settlers and native Americans.
- The history of Saint Kateri and her legacy as the Lily of the Mohawks.
- The dedication and conviction of the saints honored at the Shrine of our Lady of Martyrs.
- Places like Fort Kloch and Old Fort Johnson that bore witness to the blood that spilled as American Patriots stood firm in their desire for independence.
- The old Mill buildings and Victorian homes that stand as icons honoring hard work and perseverance.

There is a history of innovation and reinvention. Montgomery County moved from Carpet Mills to Coleco to the Target Distribution center and a new, state-of-the art Beechnut facility. Montgomery County has a history of evolving with the times, and that's what's happening today.

We also heard great stories of dynamic people connected to Montgomery County. For example, two medal of honor winners, suffragette Susan B. Anthony and her early days spent teaching in Canajoharie, and native son Kirk Douglas whose early years in Amsterdam laid the foundation for a showbiz future.

Next, let's look at another key asset: the natural beauty of Montgomery County.

We saw natural beauty throughout the research as both a source of pride for residents and a positive correlation with outside markets:

“The county is beautiful, everywhere you go.”

“Beautiful (one word) – a lot of people don’t even realize the scenery there is in the county. It’s just beautiful.”

“Beauty … beauty is underappreciated by the people who live here.”

There is a serene beauty in the landscape of Montgomery County. The stunning views as you drive from Fonda to Canajoharie, the waterfalls, streams and creeks, along with the rolling hills and pastoral farmland. It’s a place whose Natural Beauty is evident year-round, from the first buds of spring to the beauty of freshly fallen snow in the wintertime. It’s the kind of beauty you remember and stays with you.

Another Asset for Montgomery County is your central location.

Montgomery County's strategic positioning on the NY Thruway, close to Albany and Saratoga, as well as Boston, Montreal, and New York City, which are all easily accessible by Amtrak and cargo rail, indicate a strong position for future growth.

Let's also consider the Mohawk connections. Few things show the majestic power of nature like a river. It flows calmly or it rages, it determines its own course and its own path, and unless it is dammed, it cannot be stopped. We've seen how Montgomery County's history has been influenced by the Mohawk Valley and the Mohawk River. We see the connections today at events held at Riverlink Park and as construction begins on the pedestrian bridge spanning the Mohawk. Montgomery County is tied to the Mohawk River – not only by location, but also through that similar sense of determination, flow and constant change. When thinking of the Mohawk River and Montgomery County, I was reminded of a saying:

"The water you touch today is tied to the past, but holds the future of tomorrow."

In much of our research, the County is seen as a rural or agricultural community:

"Farming looks mighty easy when your plow is a pencil and you're a thousand miles from a corn field."
- Dwight D. Eisenhower

Many people have about as much experience with farming as the folks Dwight Eisenhower is referring to in this quote, but everyone can all acknowledge that there are few occupations that require the resilience, dedication and hard work of a farmer. From early morning to late at night, the farmer is diligently working toward the next day's planting or the next day's harvest. While the farmer is not sure of the reward, he is dedicated to the land and optimistic that his needs will be met.

So what is the common thread that ties together the assets of Montgomery County?

Throughout these assets we see a continuous showing of

- Determination: from the resilience of the early settlers, to the Revolutionary War battles, to flowers that bloom each spring, to the story of Kateri .
- Strength: we see strength in the mighty Mohawk River, the work ethic of the residents of Montgomery County, and the character of the residents.
- Hard Work: This community is no stranger to hard work. Whether working in the mills or rolling up their sleeves to help neighbors recover from the floods in Fort Plain.
- Commitment: This is a place where people stay, they want to be here to raise their kids. Nothing shouts "commitment" like being the home of a Shrine dedicated to passionate people who died for their cause.

Montgomery County is all these things. These attributes are hard-wired into your DNA and a part of who you were, who you are, and who you will become.

One of the most powerful quotes from the in-market trip noted this:

"Everything is cyclical and ever changing. Our forefathers originally settled here for wood production. Centuries later, we became the center of the industrial capital of the world – they would not have believed the changes. 100 years from now it will be a completely new thing."

While what Montgomery County looks like may change, businesses may come and go, the essence of who Montgomery County is and the inherent traits remain the same.

STRATEGIC BRAND PLATFORM

North Star funnels these strategic insights for the brand into a single sentence, the brand platform which can be used as a guide for creative expressions and implementation initiatives ensuring consistency and relevance.

Target Audience	For people of strength (strong will, strong convictions, strong work ethic, strong character)
Frame-of-Reference	Montgomery County, New York, nestled in the natural beauty and abundant resources of the Mohawk Valley
Point-of-Difference	is a place where a history of determination and hard work welcome the future with a firm handshake
Benefit	providing you, your family and your business a home you can count on.

Platform Rationale

- **For people of strength (strong will, strong convictions, strong work ethic, strong character),**
  - Target Audience: A statement that reveals who will find Montgomery County most attractive, often uncovers a characteristic of a group of people.
  - Montgomery County has a historical connection to people who have demonstrated this sense of "strength." Whether that ties back to Native American or Revolutionary War history or the Erie Canal, the residents of Montgomery County have displayed strong will, a strong work ethic and a sense of determination.
  - Drawing upon the concept of "strength" as shown here, allows us to take the outsider descriptions from the CAP study (blue collar, hard working, farmers, proud, honest, trustworthy) and frame them in a positive way.
  - The message of "strength" can evolve into a call-to-action for Montgomery County residents to reconnect with this part of their collective conscious and leverage that strength and determination in resident pride initiatives.

Platform Rationale

- **Montgomery County, New York, nestled in the natural beauty and abundant resources of the Mohawk Valley,**
  - Frame of reference: An easy geographic identifier – where you are located.
  - Both the community research and external perceptions point to the positive affiliation with both the stunning natural beauty of Montgomery County and the Mohawk Valley.
  - The phrase "abundant resources" is meant to contain the many resources and assets available for economic development (NY Thruway, rail, Amtrak service, affordable land, water, available labor); tourism (Mohawk River, Arkell Museum, Shrine of Martyrs, outdoor recreation) and resident recruitment (easy access to Albany or Saratoga, affordable housing, etc.).

Platform Rationale

- **is a place where a history of determination and hard work welcome the future with a firm handshake,**
  - Point of Difference: What is most relevant and distinct about Montgomery County?
  - Time and time again, we heard about the history of determination and hard work in Montgomery County. It's still there … when you see Fort Kloch or the remnants of the Erie Canal … or hear the stories of the Jesuit priests honored at the Shrine of our Lady or Martyrs. It's there when you see the old Mill Buildings – some struggling and some changing into new uses.
  - This determination is part of your history, but it's also what is going to push Montgomery County towards a brighter future.
  - It's a new day for Montgomery County – you're looking toward the future and finding ways to encourage growth and development.
  - A firm handshake is meant to convey confidence and a sense of pride. You're not backing down from the challenges ahead but you are meeting them head on.

Platform Rationale

- **providing you, your family and your business a home you can count on.**
  - Benefit: Here, we leverage the point of difference on the previous slide and think about the feelings that come from a history of determination, hard work, an eye toward the future and a firm handshake.
    - Genuine, not pretentious
    - Small-town values
    - Trust and openness
  - When we have those things, we have a place we can count on. We feel confident that promises made are promises kept.
  - This can extend to moving a business to Montgomery County, moving my family, and on to tourism … that your tourists will have a good experience here.
  - And, in Montgomery County, you can count on people. We heard stories of the floods last summer and how the community pitched in to help each other out. No one came looking for a thank you.

EVALUATION

How Is The Brand Performing?

Evaluation yields new information which may lead to the beginning of a new planning cycle. Information may be gathered from concept pre-testing, campaign impact in the marketplace and tracking studies to measure a brand's performance over time. These methods of evaluation should be used once a visual brand identity has been established based on the strategic brand platform.

Ideally, two basic questions will be answered when there is visible implementation of your brand in the community: Have responses to the brand among target audiences changed in the way the BrandPrint intended? And have these changes resulted in consumer action that will achieve the desired objectives of the brand? Turnkey or do-it-yourself programs are recommended depending on the needs of the community.

To begin the process of brand evaluation, North Star has set up a schedule to discuss Montgomery County's brand progress. This schedule begins immediately after the delivery of your BrandPrint.

- Immediately – North Star recommends Montgomery County focus efforts on growing its inquiry and visitor database.
- One year– North Star's Research Director will conduct an assessment call to outline a plan for determining brand performance moving forward. Montgomery County will be contacted to determine specific measurement goals including re-measuring awareness and perception of the community amongst intended audiences.

Building your databases and keeping them current ensures future success measurements can be calculated. These leads will be the best data start point for future brand evaluation.

EVALUATION

As stated previously, North Star will consult with the community at the proposed times to evaluate your specific needs. Keep in mind that many of the research pieces in your BrandPrint were created to act as benchmarks by which future improvements can be measured. Based on what we now know of the community, likely recommendations for success measurements at Montgomery County's one-year mark may include:

- Online Community-Wide Survey
- Consumer Awareness and Perception Study
- Community Brand Barometer

ONLINE COMMUNITY-WIDE SURVEY

Purpose
The purpose of the Online Community-wide Survey is to gain a quantitative measure of the community's perceptions of Montgomery County.

Methodology & Results
This qualitative survey is fielded online and is open to all residents of the community. The study measures the following:

- Overall top-of-mind perceptions of Montgomery County
- Strengths and weaknesses of Montgomery County
- Resident suggestions on what is missing from Montgomery County
- Measurements of Montgomery County quality of life indicators

Positive resident perceptions are a strong indicator of brand success. Successful brand implementation will energize the resident base, making them more likely think of the community in a positive light.

Timing
The Online Community-Wide Survey should be conducted annually. The first survey should be conducted no sooner than one year from brand introduction (when there is visible implementation of your brand in the community).

COMMUNITY BRAND BAROMETER

Purpose

The Community Brand Barometer measures strength of the Montgomery County brand according to:

- Resident satisfaction/advocacy with the brand as a place to live, work, and visit
- Brand satisfaction/advocacy relative to the nation.

Methodology & Results

The methodology for the Brand Barometer has been carefully developed and determined to be statistically significant. Participants answer three questions:

- Would you recommend living in Montgomery County to a friend or colleague?
- Would you recommend visiting Montgomery County to a friend or colleague?
- Would you recommend conducting business in Montgomery County to a friend or colleague?

Resident advocacy is one of the strongest measures of brand success. Successful brand implementation will energize the resident base, making them more likely to recommend their community to others.

Timing

The Community Brand Barometer should be conducted annually. The first Brand Barometer should be conducted no sooner than one year from brand introduction (when there is visible implementation of your brand in the community).

CONSUMER AWARENESS & PERCEPTION STUDY

Purpose

The purpose of this study is to gain insight into consumer awareness, visitation, and perceptions of Montgomery County.

Methodology & Results

This quantitative survey is fielded online outside of Montgomery County's borders in order to obtain an outsider's perspective. The survey measures:

- Overall top-of-mind perceptions of Montgomery County and immediate competitors
- Consumer visitation trends (frequency and nature of visitation)
- Consumer visitation drivers (business, leisure, friends and family)
- Strengths and weaknesses of Montgomery County identified within community attributes
- Consumer suggestions on what is missing from Montgomery County
- Measurements of Montgomery County's delivery of hospitality
- Measurements of Montgomery County's quality of life indicators

Timing

The CAP Study should be conducted annually. The first survey should be conducted no sooner than one year from brand introduction (when there is visible implementation of your brand in the community).