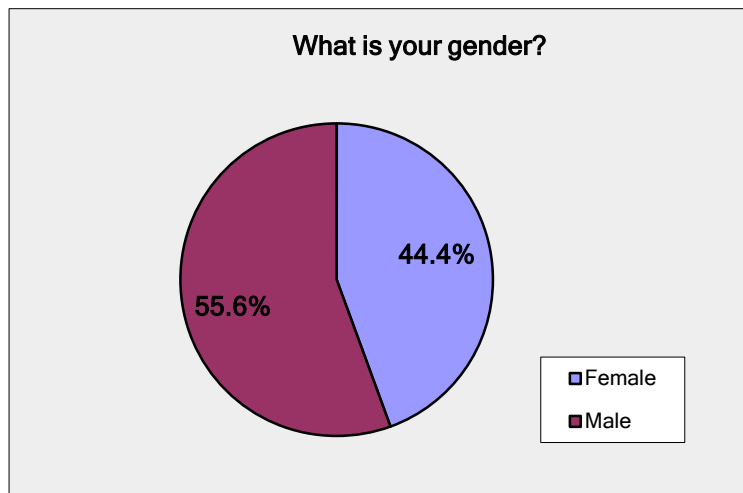


COMMUNITY & ECONOMIC DEVELOPMENT SURVEY RESULTS

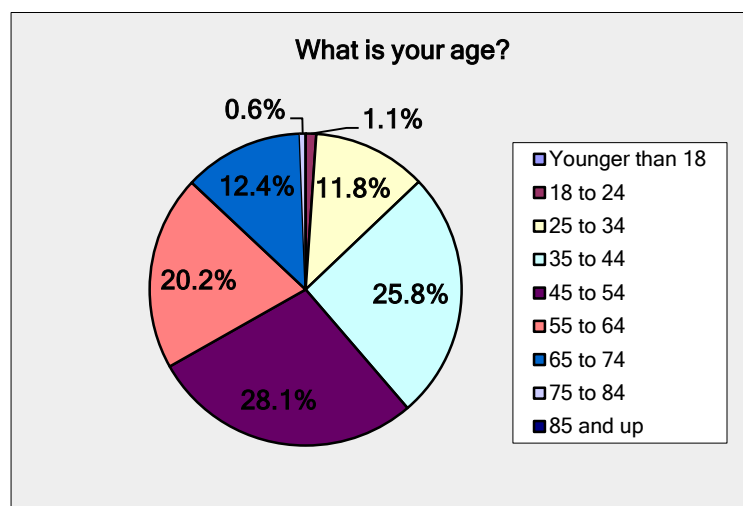
The following report summarizes the results of the Cody Master Plan Update - Community and Economic Development Survey. The survey was made available to all Cody residents, including business-owners, developers, and other stakeholders. A total of 181 people participated in the survey, many of whom provided additional input in the "comments" section of some of the questions. The results of this survey will be used to identify community preferences and potential opportunities for the Master Plan Update.

PART 1: DEMOGRAPHIC QUESTIONS

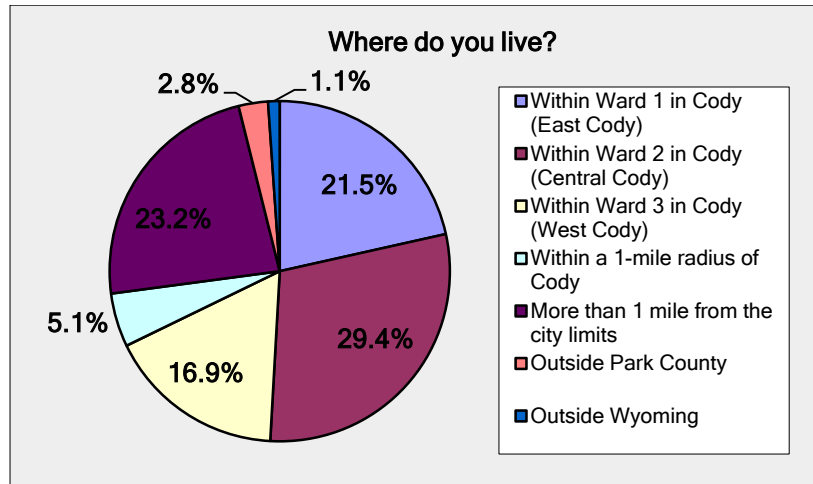
Question 1. The gender of the survey respondents was mostly balanced, with slightly more men participating than women.



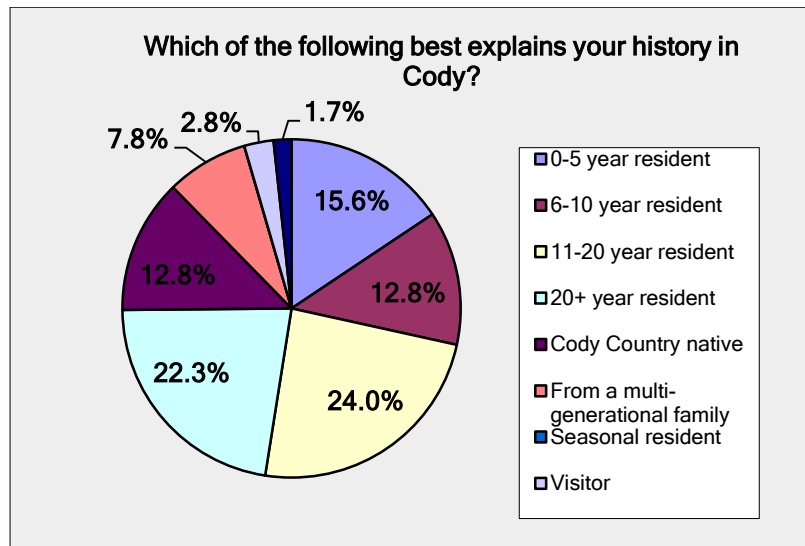
Question 2. The age of respondents, with nearly 75 percent between the ages of 35 and 64.



Question 3. Most of the respondents live within the Cody city limits, but a number of non-residents responded to the survey as well. Many of these respondents may work, own businesses, or shop within city limits.

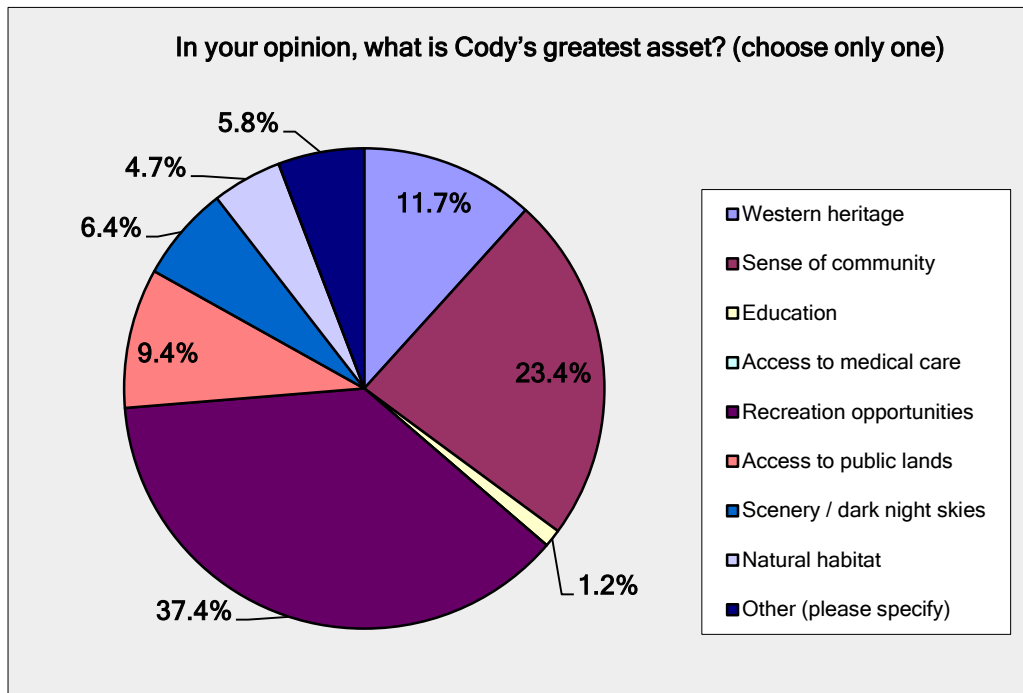


Question 4. Some respondents are Cody natives or have lived in Cody for many years, while others are relative newcomers.

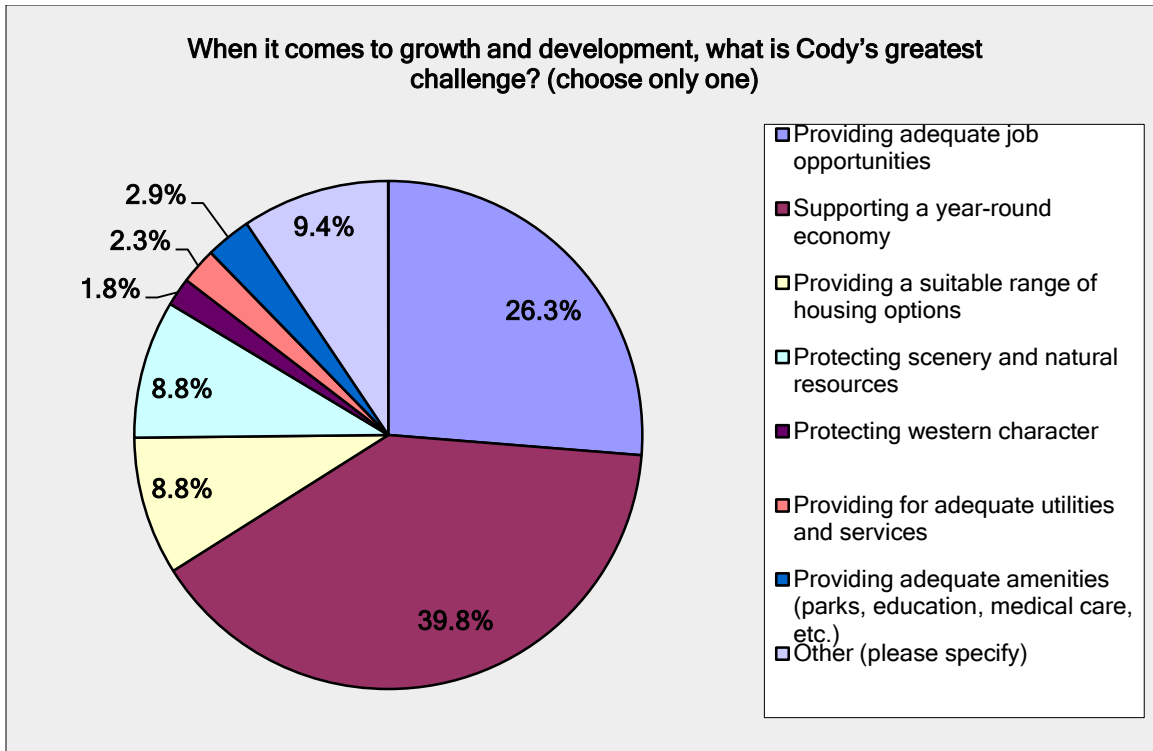


PART 2: MASTER PLAN QUESTIONS

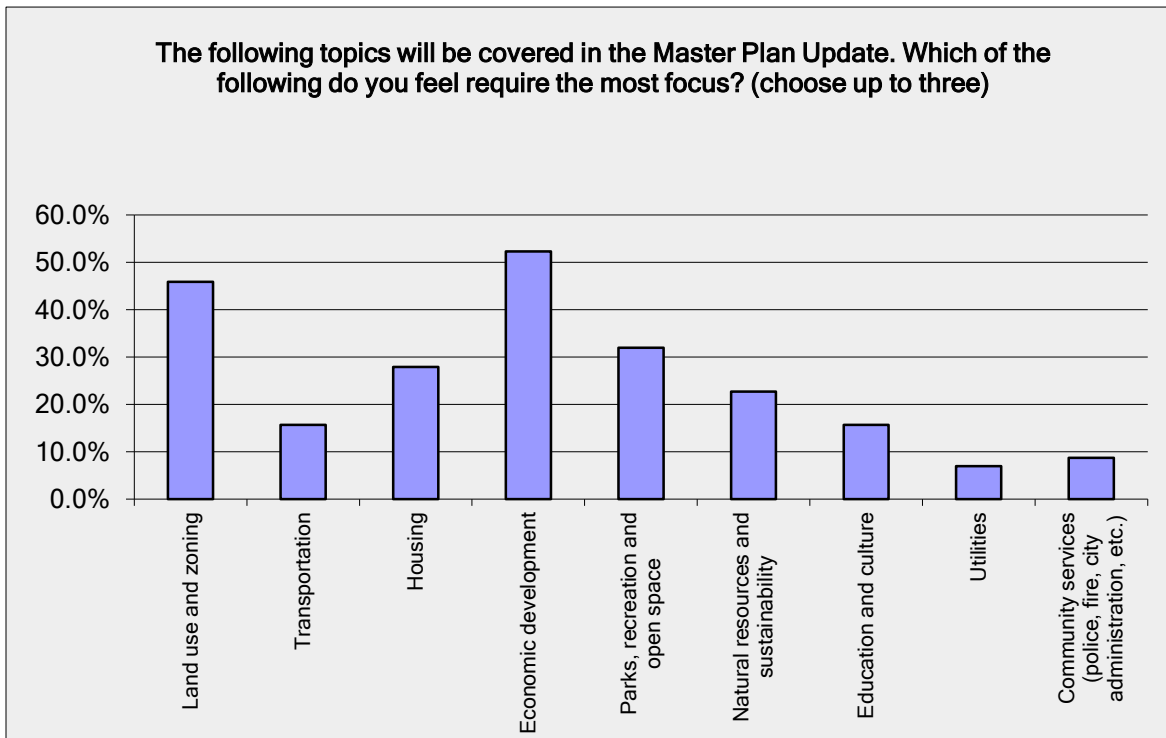
Question 5. According to the survey Cody's top three assets are its recreation opportunities, sense of community and western heritage. The open-ended responses to this question also listed topics such as natural resources (oil, natural gas, wildlife, landscape), lack of congestion, a small-town lifestyle with the amenities of a larger city, attractions like the Buffalo Bill Historical Center, and the exuberance of the city as additional assets.



Question 6. Cody's greatest challenges related to growth and development, as identified in the survey, are supporting a year-round economy and providing adequate job opportunities. Other challenges noted by respondents included maintaining and building adequate infrastructure, maintaining a small-town feel, planning for the appropriate type and location of growth to protect community values in the long term, protecting residential neighborhoods close to downtown from commercial development, caring for Cody's less fortunate residents, providing better pedestrian connectivity, attracting people and new job opportunities with limited resources, increasing the community's reliance on sustainable jobs and food, and reducing the need for car travel. Some comments favored more regulation for new development, while others felt that growth and development are excessively regulated. Still other respondents expressed frustration with a traditional political structure that allows more subjectivity in community decisions.



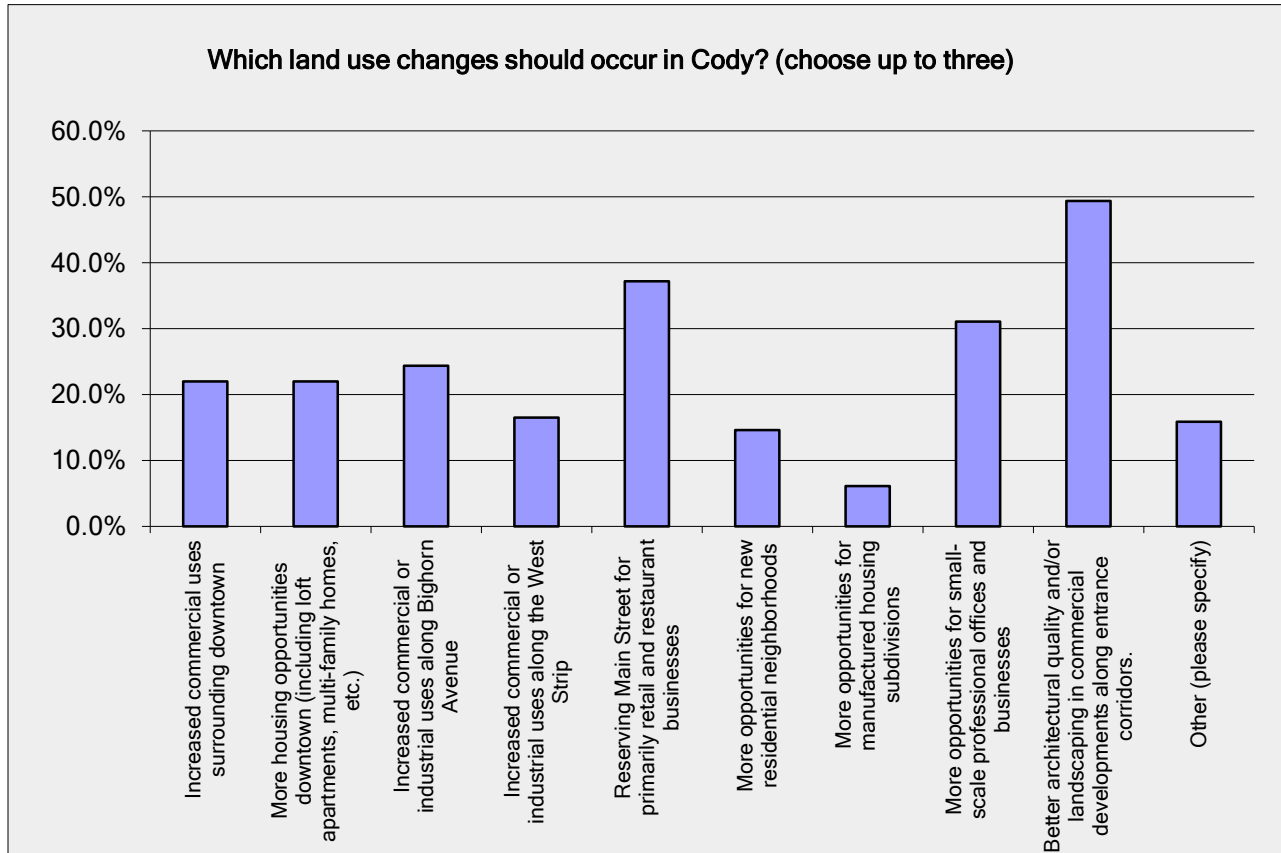
Question 7. Economic development, land use and parks, recreation and open space were noted as the topics that will require the most focus for the Master Plan Update.



Question 8. The top land use concerns were architectural quality and landscaping on commercial developments along the community's gateways, reserving Main Street for primarily retail and restaurants, and providing more opportunities for small-scale professional businesses. A number of other land use and zoning changes were noted in the comments, and included protecting existing residential neighborhoods from commercial development, revising ordinances to allow more modular homes, beautification and traffic calming on heavily-used residential streets, additional requirements for sidewalks, bike paths and street improvements in new developments, reduction in the number of zoning variances granted, improved access and connectivity for pedestrians and bicycles, increased number of liquor licenses, more landscaping and larger buffer zones separating commercial and industrial uses from residential uses, additional outdoor recreation opportunities in and near town, reducing light pollution, additional regulation of signage, improved quality and aesthetics of new development, and reduction in unnecessary regulation that hampers new growth.

Land use changes suggested for specific areas of the community included:

- A trail system from the Southfork to Skyline Drive
- Better architectural quality for downtown storefronts
- Improving the aesthetics of the northern entrance to the city, the west strip, and Bighorn Avenue
- An improved pedestrian path around the city, including Beck Lake Park, around the airport on Beacon Hill, over to Sheridan Avenue, and down the side of the hill

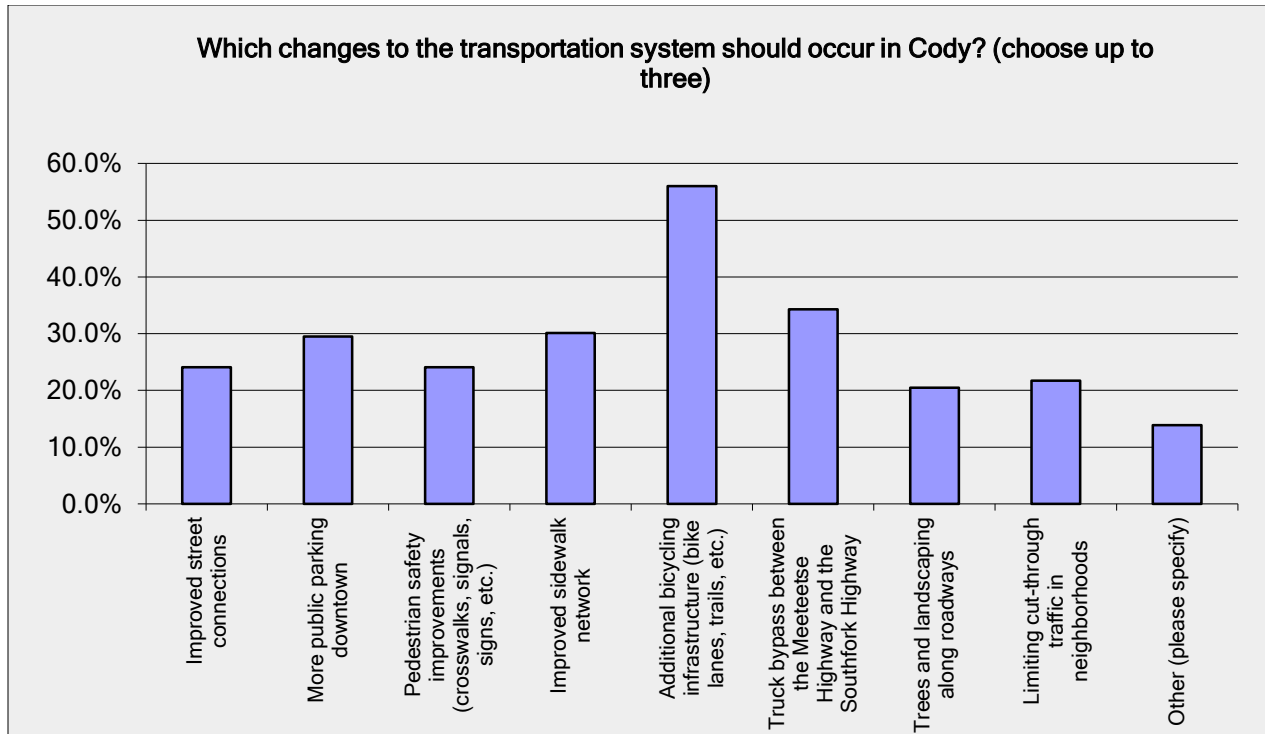


Question 9. The top transportation priorities identified were additional bicycling infrastructure, the construction of a truck bypass, an improved sidewalk network and additional downtown parking. Other transportation priorities and concerns that were identified include: establishment of a truck route, suggestion for restricting RV and truck traffic through residential areas, need for public transportation both within the city and to outlying areas, improved air service and additional morning flights, landscaped medians to control turning movements off of and onto primary access roads, improved timing of traffic signals, separation of bike lanes from vehicle lanes, conversion of yield signs in neighborhoods to stop signs, improved snow plowing on streets in the winter, better education and information about pedestrian and bicycle transportation routes, traffic calming on east/test traffic corridors in residential areas, creating a park-and-ride and walk-and-ride culture, suggestion for a driving tax disincentive to encourage other modes of transportation, require sidewalks with all new developments without exception, redesign intersections for pedestrian safety and reduced traffic speed, and completion of sidewalk networks to and from schools. One respondent felt that the weight restrictions on streets should be communicated better and earlier to drivers.

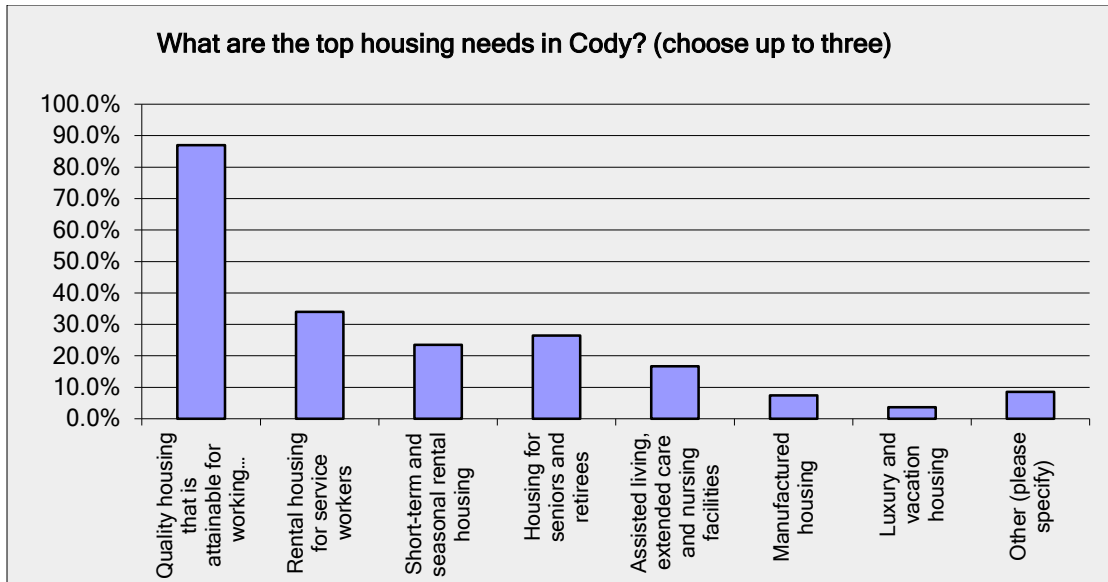
Transportation changes suggested for specific areas of the community included:

- Suggestion for truck bypasses between Greybull Highway and Powell Highway and/or from Stampede to the West Strip
- Reopen the Old South Fork Road to ease congestion on Canyon Avenue
- Alternate local route (not necessarily a truck bypass) from the South Fork to town to improve access to the post office and school
- Paving of the dirt roadways along irrigation ditches for a bike path connecting Cody to Powell
- Bus service between Powell and Cody during commuting times
- Concerns about weight limit violations on Canyon Avenue
- Improve transportation collectors such as South Fork, Meeteetse, Eastgate to Beacon Hill, east of Balckgurn to the top of the hill or to Bighorn Avenue
- Finish East Sheridan Avenue road improvements
- Road improvements on 29th Street, Central Avenue and Robert Street
- Widen Beacon Hill Road

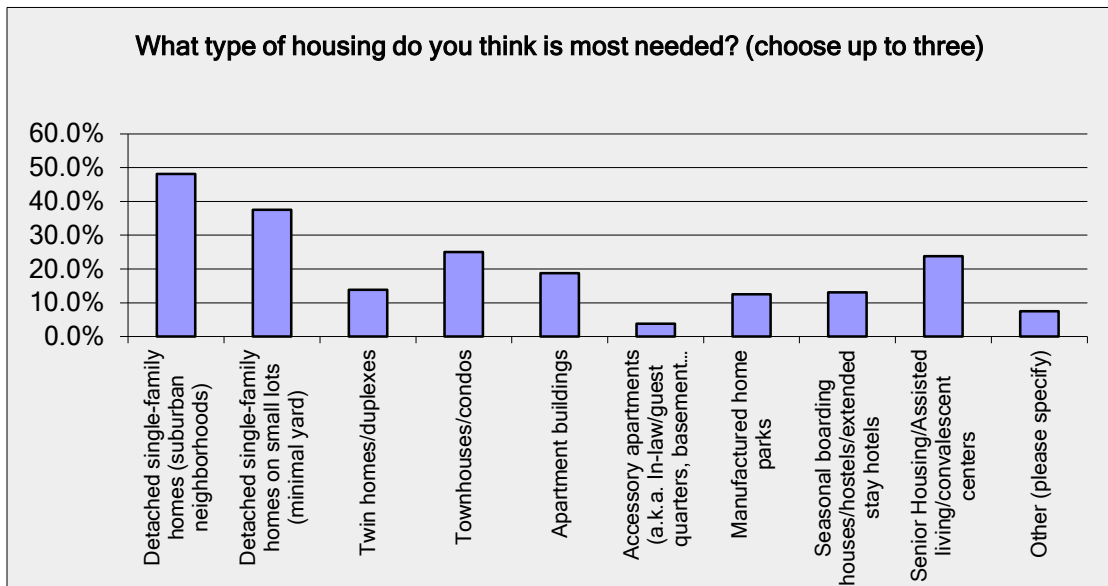
Safety improvements at the 19th Street crosswalk near the Eastside School and across Bighorn Avenue in the 35 mph section



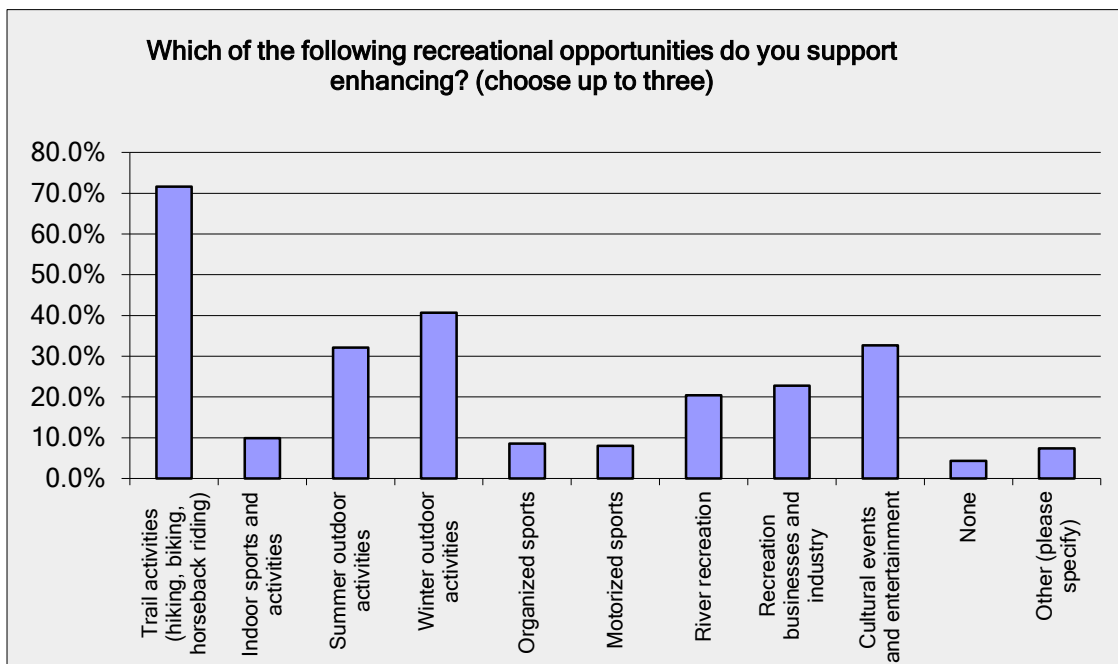
Question 10. By far, the top housing need in Cody is quality housing that is attainable for working families. Open-ended responses offered additional suggestions and comments, including: providing more low income and/or affordable housing to serve the needs of working families and individuals, additional manufactured housing in a controlled environment, affordable single-living apartments within walking distance of commercial areas, housing for transitional populations (e.g. recovering from addiction or criminal histories), protection of housing in existing neighborhoods from commercial uses, multi-generational housing with food and basic services within walking distance, cluster housing developments to create small neighborhoods with green space access and to improve affordability of housing, adoption of ordinances to incentivize developers who engage in more sustainable layouts rather than maximizing the number of houses per acre, mandate greater energy efficiency standards through building codes, and replacement of substandard housing in Cody through incentives and phasing to provide higher quality housing for the same income level (e.g. Judy's mobile home park). Other respondents commented that the market, rather than the City, should determine housing supply, demand, and prices.



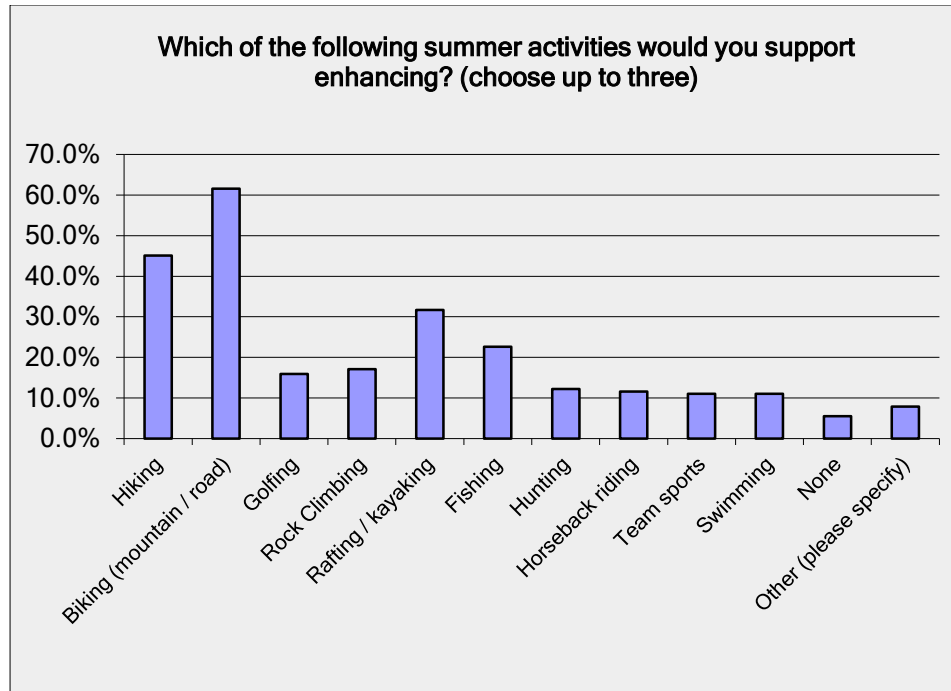
Question 11. Single family homes, both attached and detached, were identified as the top housing need in Cody. Additional housing needs identified in the open-ended responses included manufactured housing within city limits, cluster housing that incorporates open space and provides townhouse and detached housing options, estate-style homes on large lots, low to medium-income housing on smaller lots, lofts and townhomes with high-quality architecture, rental housing that allows dogs, housing within current and historical neighborhoods, consistent building and design standards, and new urbanism-style housing with amenities within walking distance. One respondent noted that incentives for low-income housing should not occur at the expense of road and sidewalk improvement requirements. Others commented that the private sector should be responsible for responding to housing needs, rather than local government.



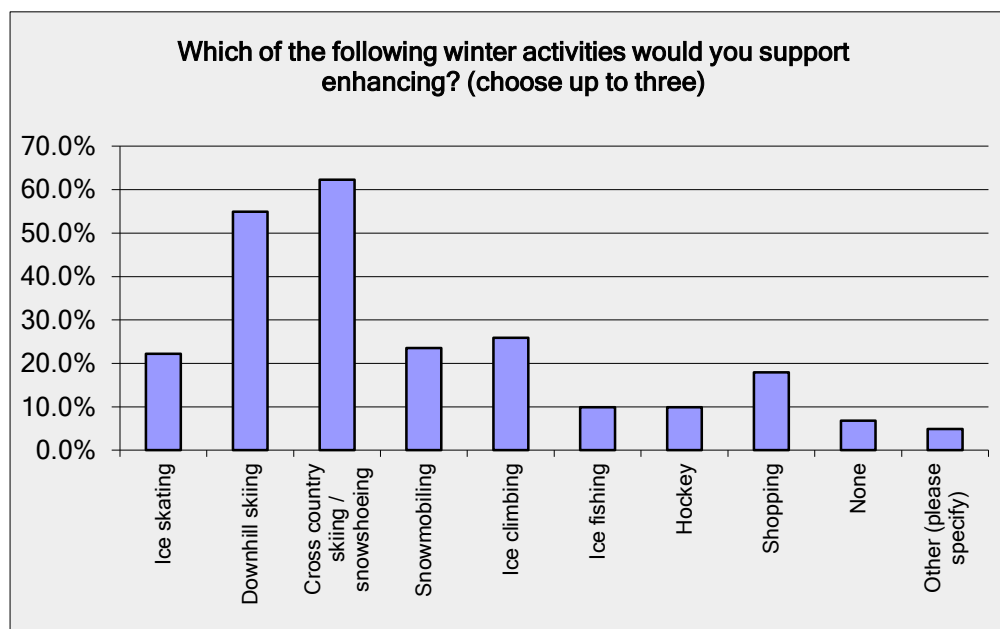
Question 12. Trail activities were ranked as the recreational opportunity that respondents support enhancing the most. In addition to the options noted in the survey, a number of other recreational opportunities were suggested, such as indoor rock climbing, more city support of the existing golf course, additional golf courses, an indoor equestrian arena, an outdoor community swimming pool, an interconnected regional network of bike trails, providing recreation opportunities for all income and age levels, large sports tournaments (e.g. soccer), creating a riverfront whitewater park, greater support for Sleeping Giant, greater support for the hockey arena, and living history opportunities and guided outdoor recreation that include Native American tribes and tribal members (e.g. Crow, Shoshone, Northern Arapaho, Nez Perce and Blackfoot tribes). There was support for limiting motorized uses, particularly in the Shoshone Forest. One respondent noted that cultural events and entertainment are a low-impact way to increase visitation to Cody.



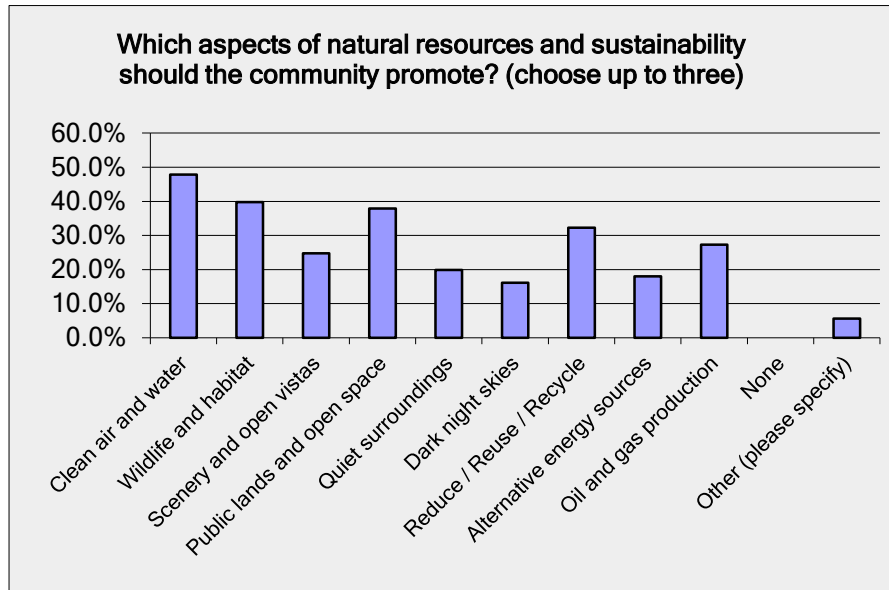
Question 13. The top summer activities to enhance were hiking and mountain biking, followed by kayaking and rafting. Summer activities that respondents support enhancing in addition to those listed in the survey include: an outdoor swimming pool or lake area (e.g. Buffalo pool), off-highway vehicle use opportunities, tennis, sightseeing, and City Park concerts. Some concern was expressed that enhancing recreational activities should not be within the scope of the Master Plan.



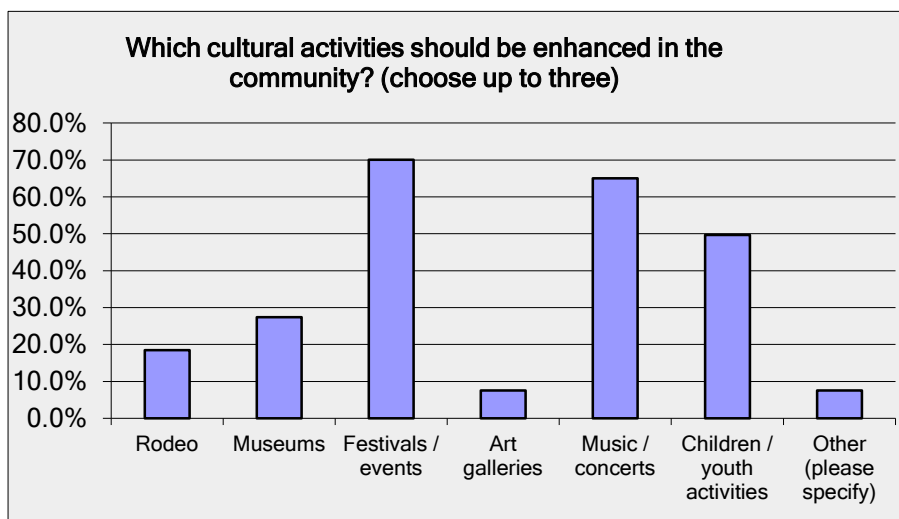
Question 14. The highest priority winter activities were cross-country skiing and snowshoeing and downhill skiing. Other winter activities that respondents support enhancing, beyond the survey options, include: an indoor tennis and track facility, biking, recreation center activities, and indoor tournaments (e.g. for basketball, racquetball, hockey). There was some opposition to increasing snowmobiling opportunities. Some respondents felt that the current winter recreation offerings just need to be further developed, rather than adding new activities. Other respondents did not feel that the Master Plan should address outdoor recreation outside city limits or on county/federal lands.



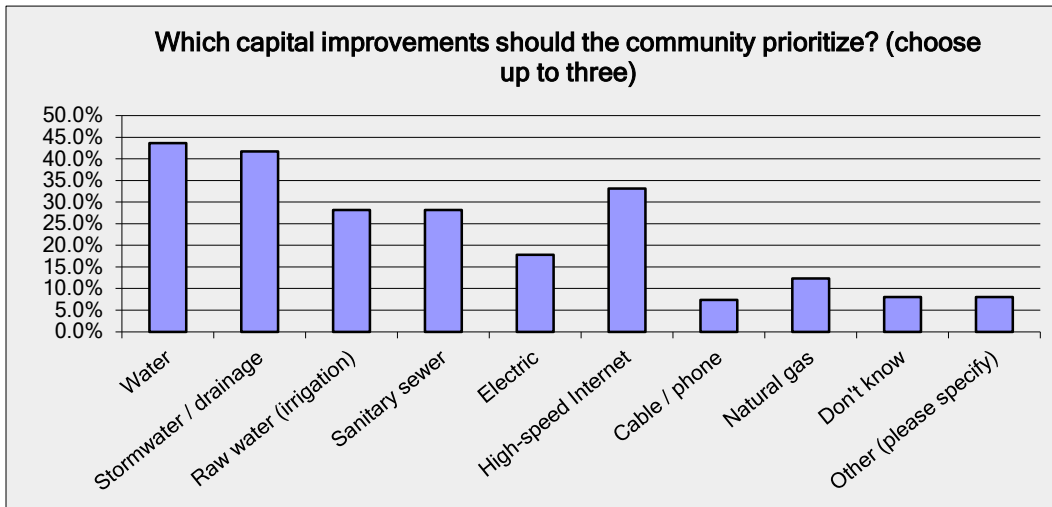
Question 15. Clean air and water was identified as the top priority, though a number of respondents commented that they supported protecting all of the resources listed. There were suggestions for a clean indoor air ordinance and a truck bypass route around residential areas to improve air quality. One responder noted that the Master Plan should only address items the city can control and another clarified that many of these resources should be *protected* rather than *promoted*.



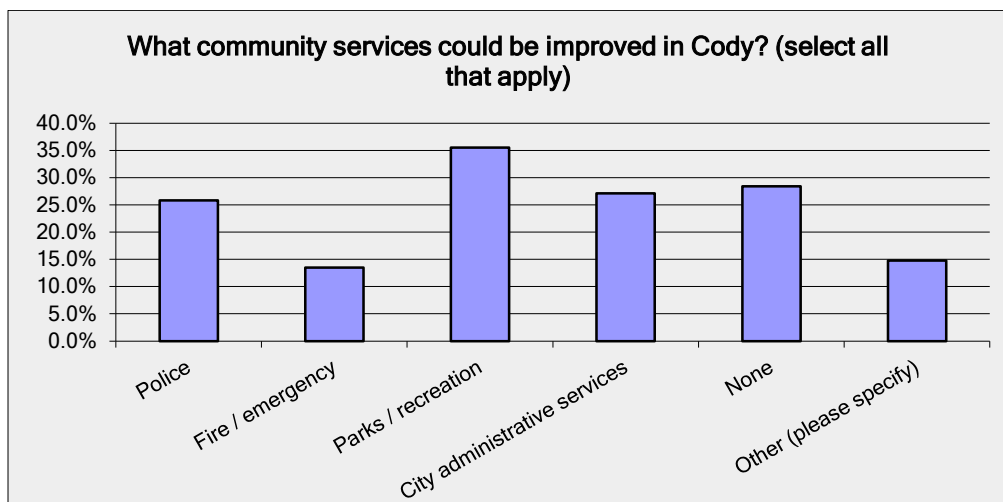
Question 16. The top cultural activities to enhance were festivals and events, music and concerts, and children and youth activities. Additional suggestions beyond the survey options included: Farmers Markets, better utilization of the Canal Park Amphitheater, equestrian events, more resident-oriented shopping, Native American heritage activities such as guided tours, improved child care, and improvements to the Cody Auditorium. There was both support for and opposition to the development of a convention center for large and small events. There was support for a better Visitor's Center to conveniently provide information and services. A number of respondents suggested that the city already offers enough cultural activities.



Question 17. Drinking water, stormwater and high-speed internet were the top capital improvement priorities identified. Other capital improvement priorities noted in the comments included: landscaping and hardscaping, alternative energy development, conservation measures for water and electricity, infrastructure for local food production and processing, road network improvements, sidewalks and pedestrian safety improvements, bicycle paths and trails, the addition of a filter system in the raw water system, and improvements to the resilience of the electrical system in winter storms to protect from loss of power. There was also support for making it easier for small wind and solar generators to get credit for their power.

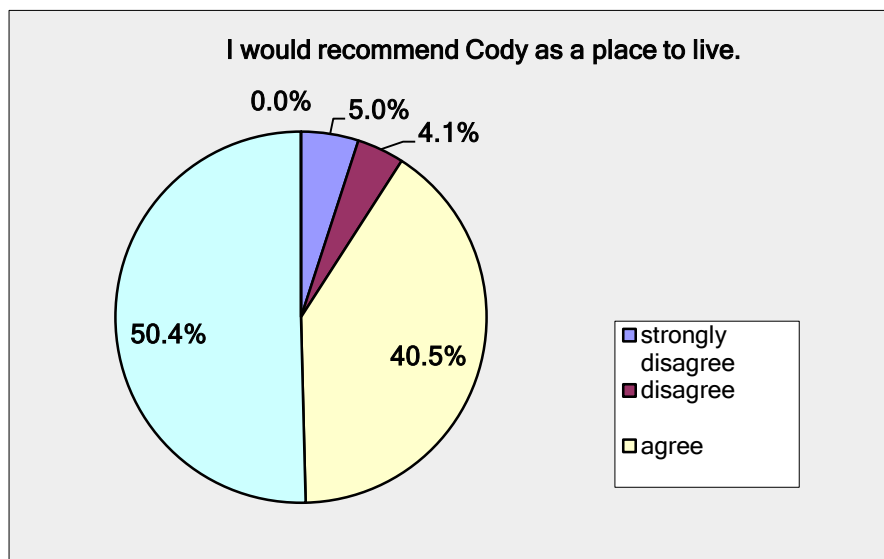


Question 18. Parks and recreation were noted as the top community service improvements that are needed. Other community service needs and priorities included: medical facilities, search and rescue, youth justice, youth mentorship, work opportunities for the underemployed, traffic enforcement in residential areas, a community service or public information officer, child care, a homeless shelter, increased budgets for fire and police, expansion of all emergency services, park maintenance and improvements (possibly using cash-in-lieu funds), zoning improvements, and reduction of the City's workforce.

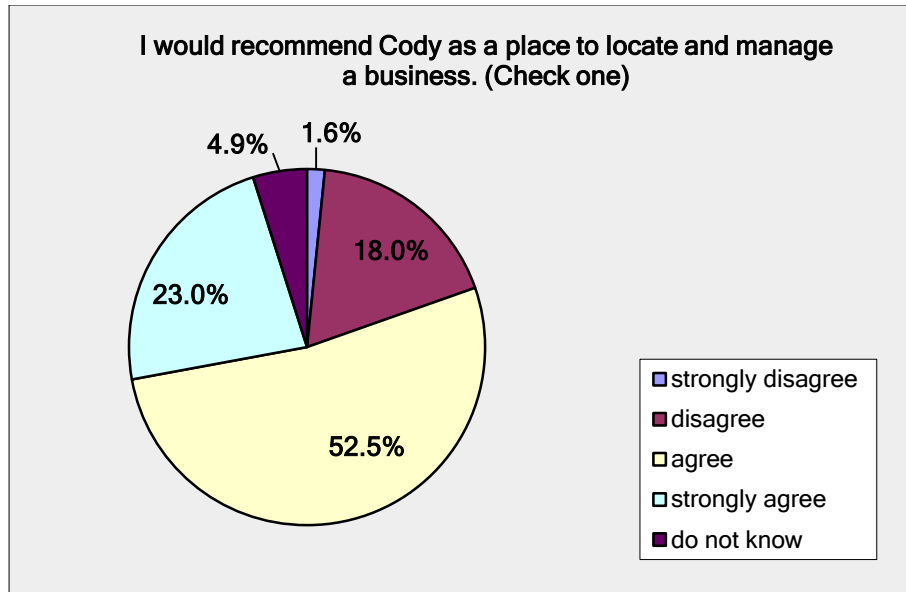


PART 3: ECONOMIC DEVELOPMENT QUESTIONS

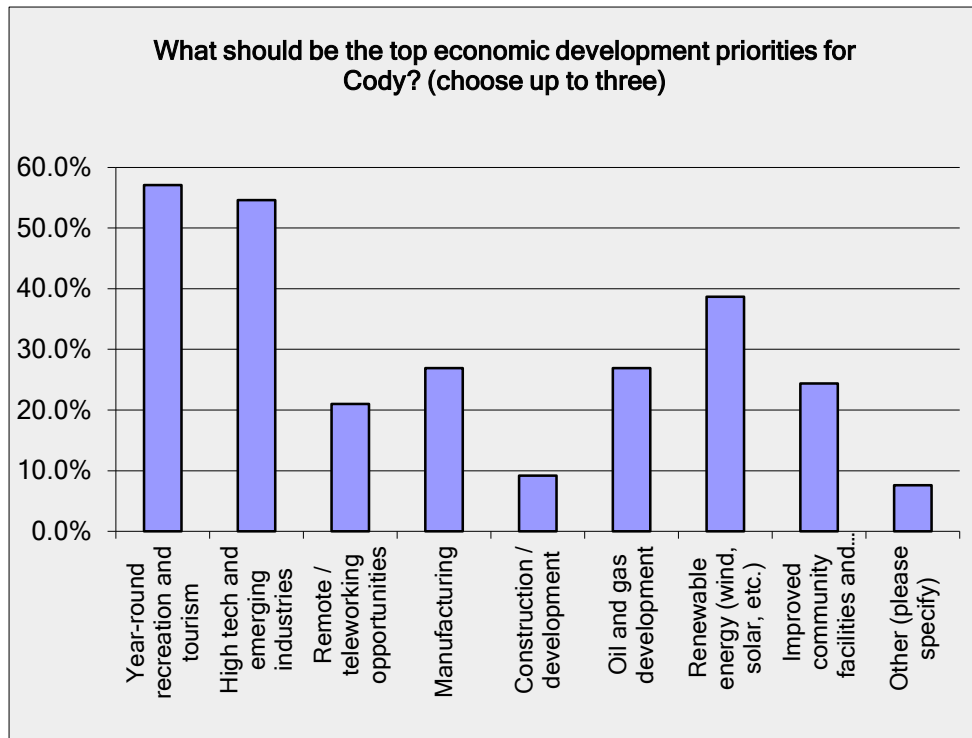
Question 19. Over 90 percent of the respondents would recommend Cody as a place to live, and some commented on the community spirit and the size of the community as attractive factors. However, there were also some negative responses regarding the difficulty of find jobs and housing that is affordable, a feeling of isolation for single young adults, the amount of wind, and changing conditions in the city's residential areas. One commenter felt that the community is not friendly to outsiders.



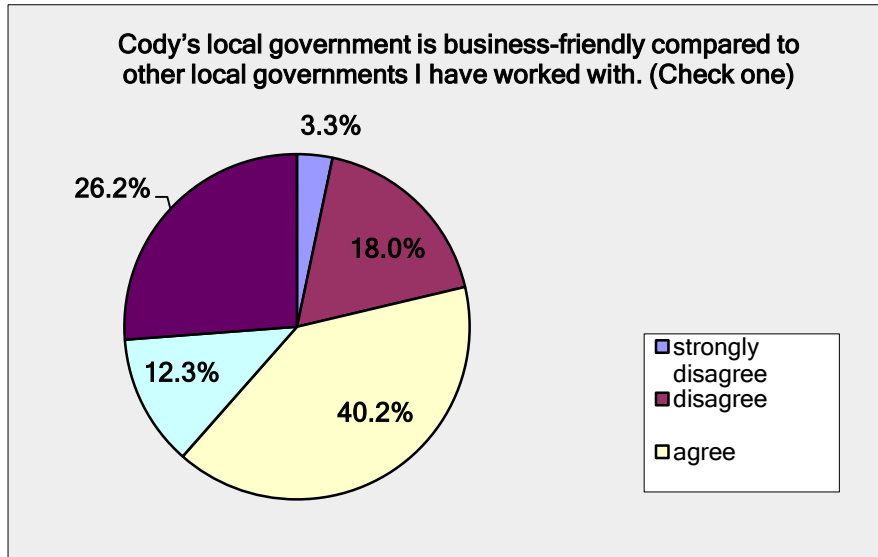
Question 20. More than 75 percent of the respondents would recommend Cody as a place to locate and manage a business, though some clarified that the response may vary for different types of businesses. Some respondents felt that the cost of operating a business is higher in Cody than in Powell or other nearby communities, but recognized that the features that make Cody more expensive also make it an attractive place to live. Another commented that tourist-oriented businesses seem most appropriate. Others indicated that there may be too many competing business, such as coffee shops, or that Cody is too small to support many more businesses. The quality of the labor pool in Cody was a concern, though there was also opposition to companies bringing in their own labor force rather than hiring from within Cody. One commenter noted that it is challenging for service industry workers to make enough wages in a year, since many businesses close in the winter. There were concerns about new businesses locating in residential areas rather than areas zoned for commercial use.



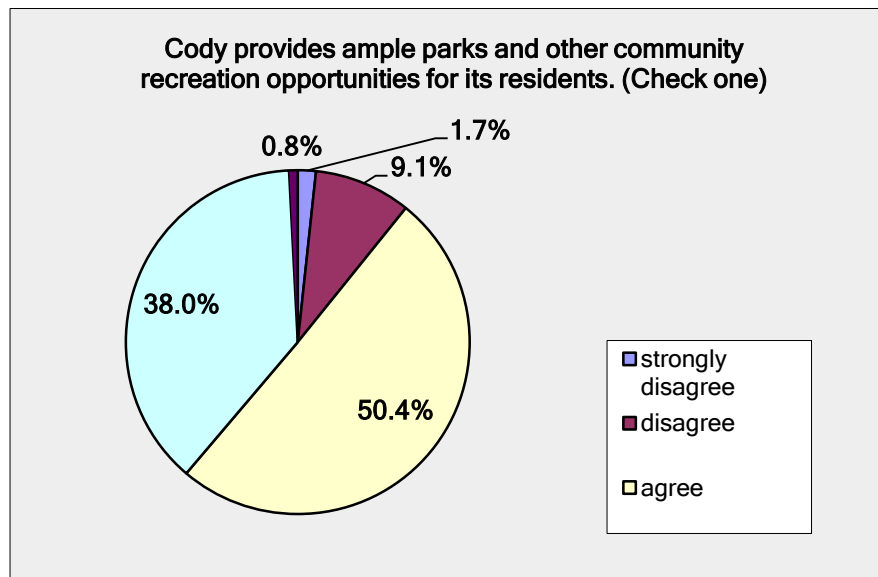
Question 21. Year-round recreation and tourism and high-tech and emerging technologies should be top priorities for Cody. Other top priorities mentioned include: promotion and retention of existing businesses, improved air service, improved transportation, and investment in good restaurants and chefs. One respondent commented that improving the education system so that it is place-based and covers both vocational and traditional education to attract individuals and businesses who value high-quality education. Eleutian was noted as an example of a desirable industry to prioritize for Cody. Another commenter suggested evaluating Cody's labor force to determine where there are needs for new opportunities, and targeting those industries.



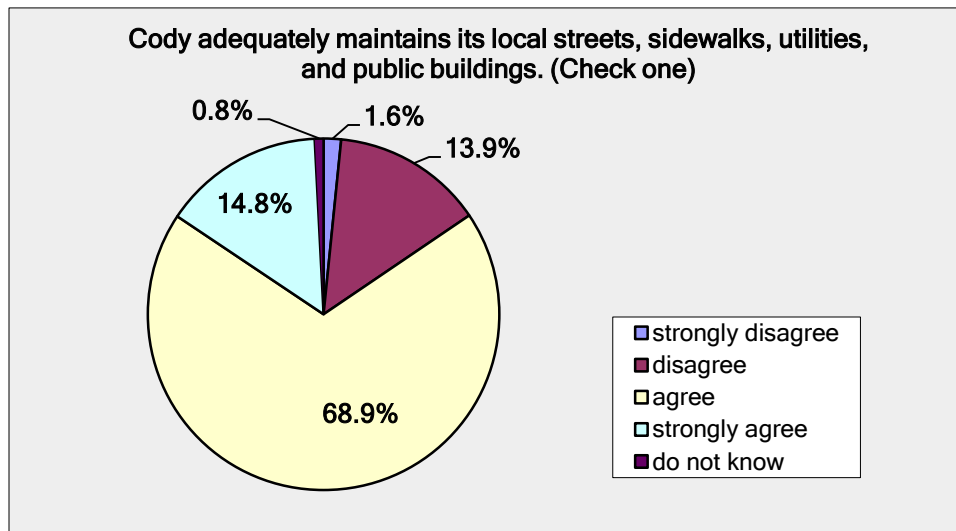
Question 22. The open-ended answers to this question represented a range of perspectives. Some respondents feel that Cody is too business-friendly, attracting new businesses at the expense of other community goals. Others commented that the existing regulations and zoning deter new business in Cody, and that more resources should be spent on assistance than regulation, oversight and enforcement. Respondents also noted that the ease of developing a new business in Cody depends more on "who you know" than anything else.



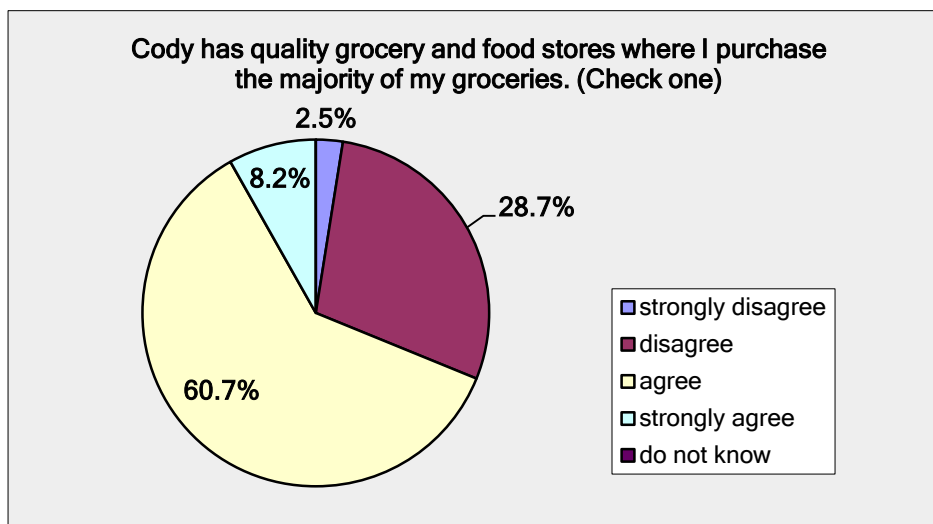
Question 23. Respondents generally agreed that Cody provides ample parks and recreation opportunities, with some commenting that Cody may even have too many parks. It was noted that better maintenance of the existing parks and recreation facilities is needed. Respondents who were not satisfied with Cody's current recreation opportunities suggested additional trails, new opportunities for ice climbing, mountain biking and road biking. One respondent commented that the scheduling and organization of sports and recreation center activities should be improved.



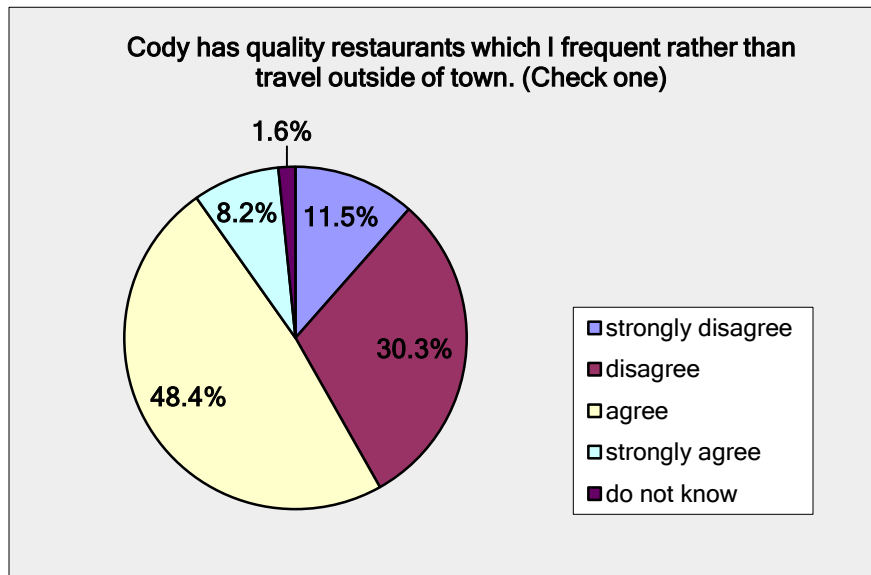
Question 24. Infrastructure concerns and deficiencies noted by the respondents included: an incomplete sidewalk network, need for sidewalk replacement in some areas, inadequate snow removal, need for road improvements, electrical power outages, storage of RVs and trailers on streets, and street potholes. There was a concern that infrastructure improvements are not evenly distributed throughout the city, as some areas are better served than others. Some commented that there is a need for new infrastructure to be built in anticipation of future growth. A concern was also expressed about street sweepers sweeping rocks and pebbles into bike lanes, creating safety hazards.



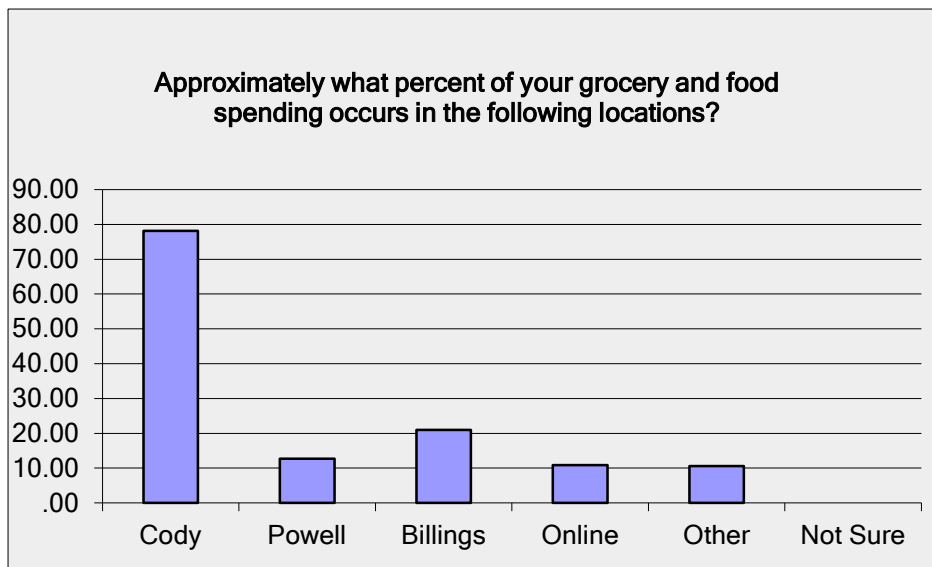
Question 25. Approximately two-thirds of the respondents agreed that Cody offers quality grocery and food stores. However, some respondents felt that even though they purchase most of their groceries in town, the quality is low, the prices high or the selection limited. For the two grocery options in town, Wal-Mart and Albertsons, both support and dissatisfaction was expressed. Some see a need for affordable local and organic food options, health food choices, and better produce selection. Support was expressed for the addition of one new grocery store, a co-op market, or a Whole Foods to add variety.



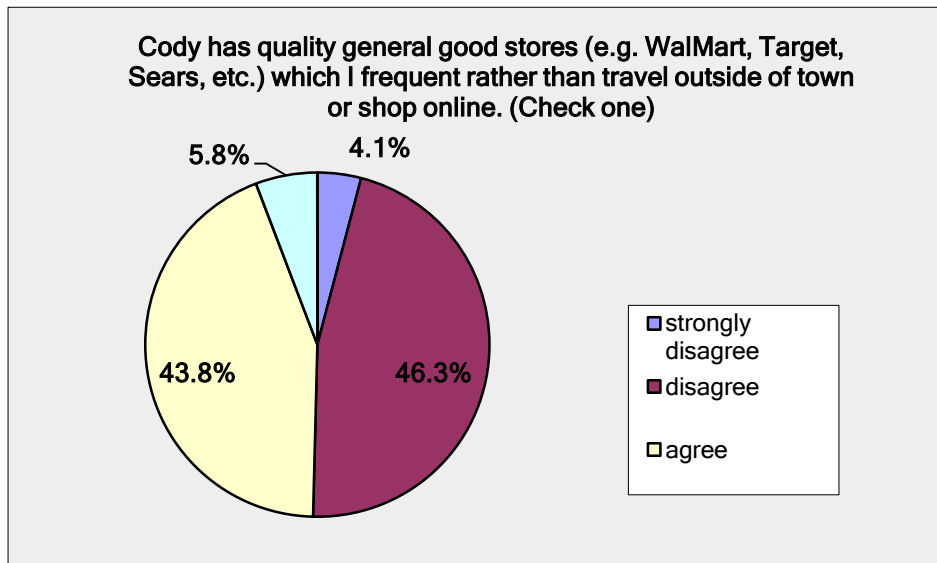
Question 26. While the majority of respondents felt that Cody offers adequate restaurant options, more than 40 percent of respondents were dissatisfied. The quality of Cody's restaurants was a major concern, with respondents commenting that the current food options are unhealthy, lack variety, and a poor value. It was noted that nearby towns such as Red Lodge, Billings, and Thermopolis offer better restaurant options. Others commented that menus are stagnant, service is inconsistent, the dining atmosphere is not always welcoming, and there is a lack of variety in cuisine. There is demand for more, higher quality restaurants including major chains such as Chili's, Applebee's, Sanford's, Famous Dave's, Perkins, and Outback Steakhouse. There was also support for attracting new, recognized chefs to improve the quality of the food at existing restaurants.



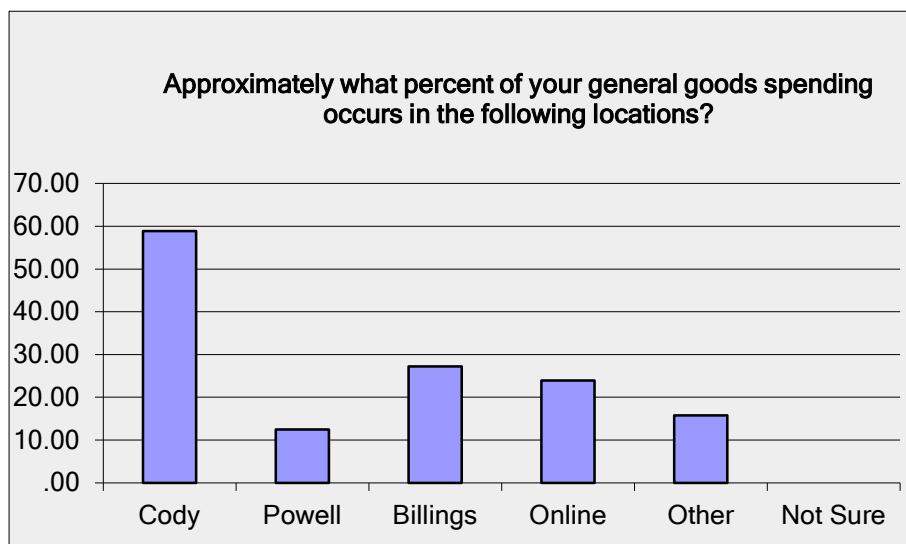
Question 27. Grocery and food spending occurs primarily in Cody.



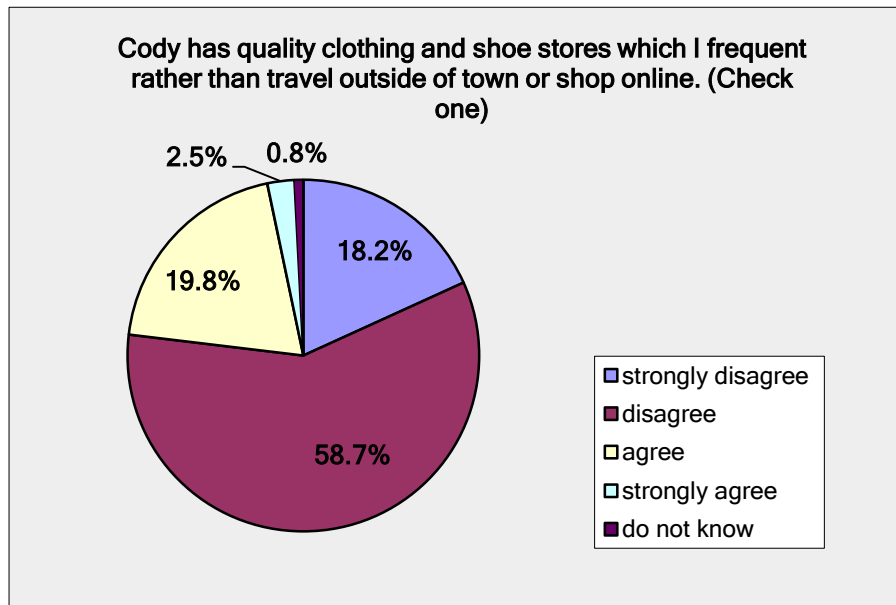
Question 28. About half of the respondents felt that Cody does not offer quality general store options. As indicated by the open-ended comments, there seems to be great support for a Target store. There was support for an agricultural-oriented store, such as Linton's Big R. A number of commenters expressed dissatisfaction with the quality of goods at Cody's Wal-Mart. There was also concern that the smaller general goods stores in Cody are too expensive for residents to reasonably afford. Many respondents indicated that they are relying increasingly more on online shopping options, as Cody is small and fairly isolated from larger cities. Some noted that they only shop for certain items when they are in town, and purchase other items when travelling elsewhere. Still others commented that they would prefer to support local businesses rather than big box retail chains.



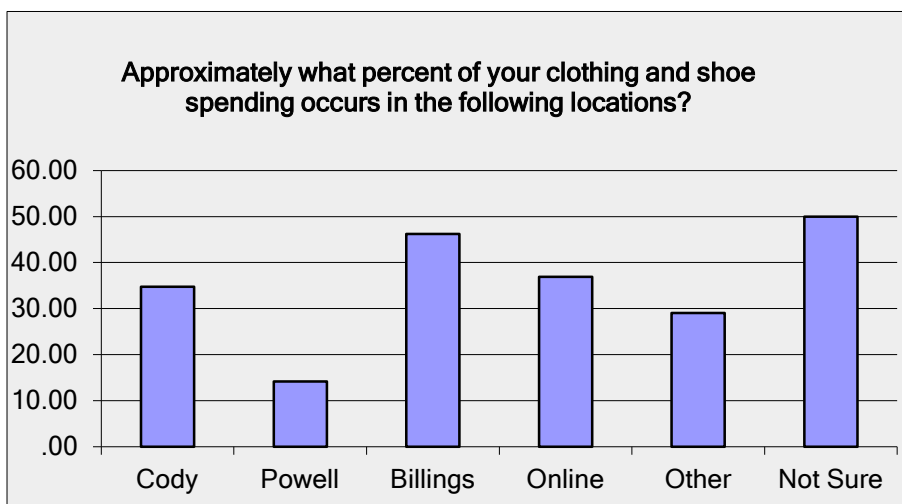
Question 29. Most general goods dollars are spent in Cody, with some spending occurring in nearby communities and online.



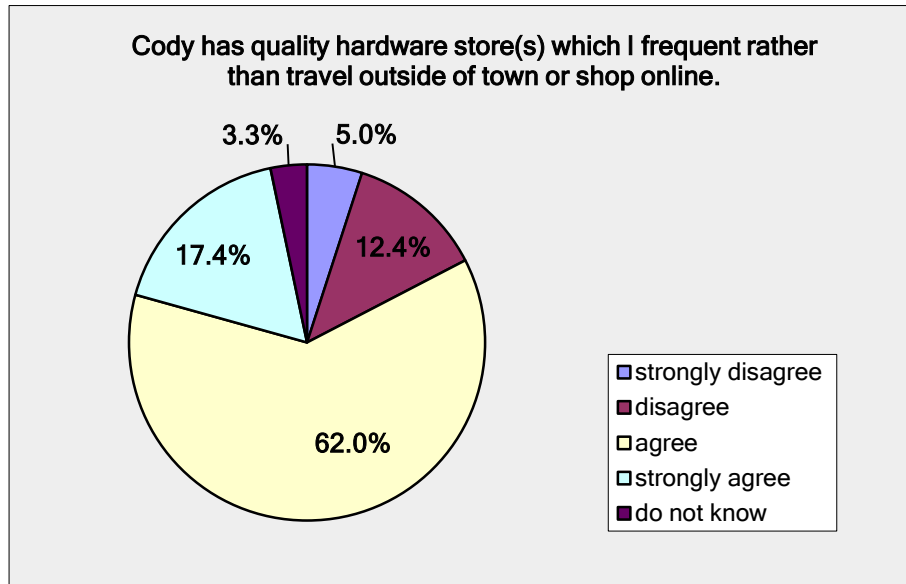
Question 30. More than 75 percent of respondents were not satisfied with the clothing and shoe retail options in Cody. It was noted that clothing and shoe options are limited, particularly for maternity clothing, children's' clothing, clothing for teenagers, and shoes. Both women's and menswear were mentioned as lacking, and variety, prices and quality of the clothing selection were all concerns. There was dissatisfaction with the amount of tourist-oriented and "western wear" retail in town. Many respondents commented that they do much of their shopping outside Cody, where there is better selection and clothing and shoes are more affordable. There is demand for more options for work attire and professional clothing, as well as clothing produced locally or more sustainably than the current options. Some commenters noted that they are satisfied with the Sierra Trading Post in Cody.



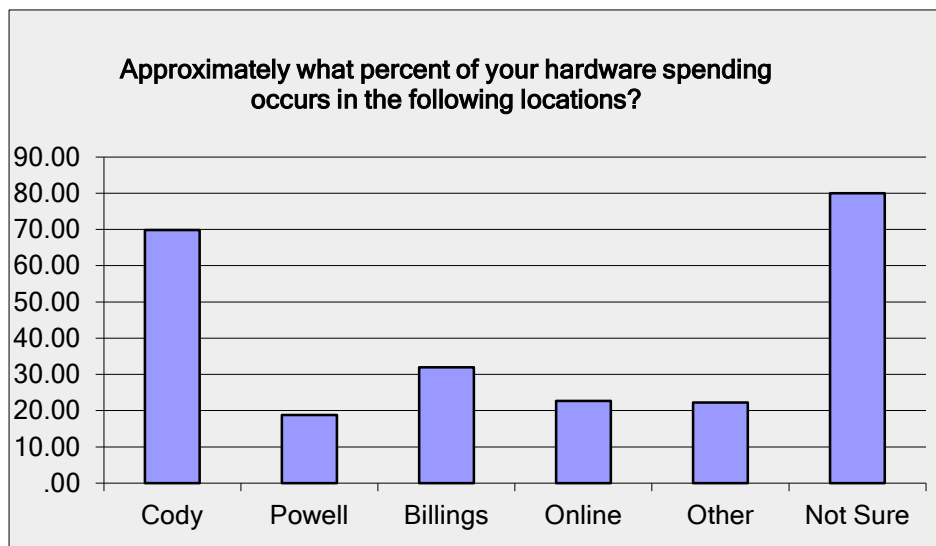
Question 31. More clothing and shoe spending occurs outside Cody and online than in Cody.



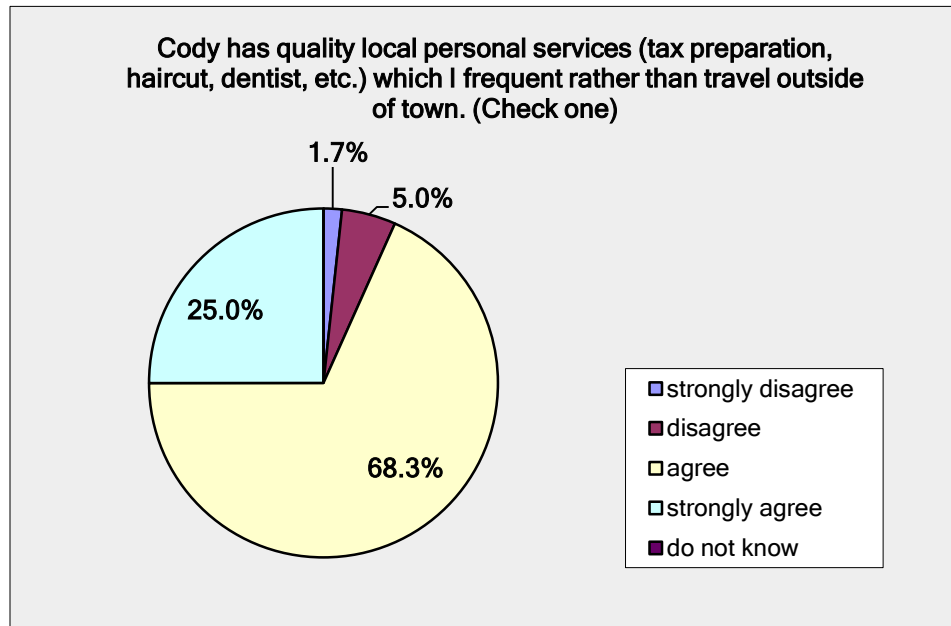
Question 32. Most respondents are satisfied with Cody's existing hardware stores, and many noted their satisfaction with Ace Hardware, in particular. However, some commented that Billings, Powell and other communities offer better selection and prices than Cody, particularly at stores like Home Depot and Lowes. There was interest in bringing more hardware options to Cody in the future so that better quality hardware is more convenient for residents.



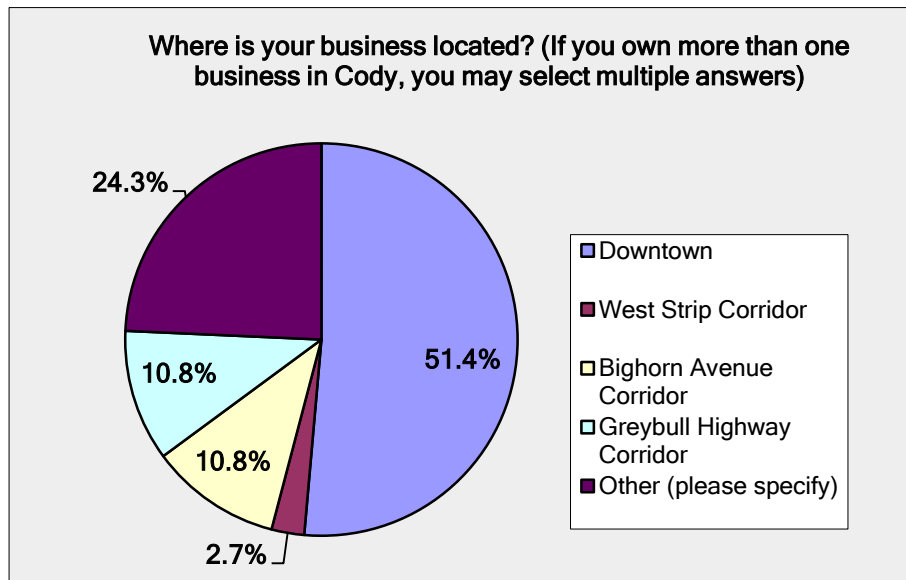
Question 33. The survey respondents generally spend more money on hardware in Cody than outside of Cody or online.



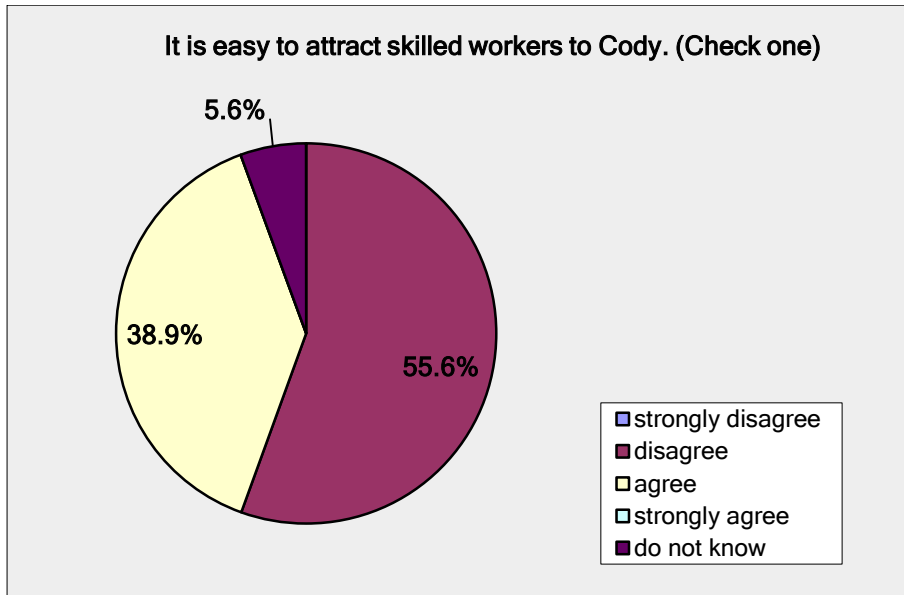
Question 34. More than 93 percent of respondents are satisfied with the local personal service choices in Cody. The few respondents that disagreed noted that the services in town may be convenient but they are not of the highest quality, they use some services in town but travel for the rest, or that the wait periods for appointments in Cody are very long.



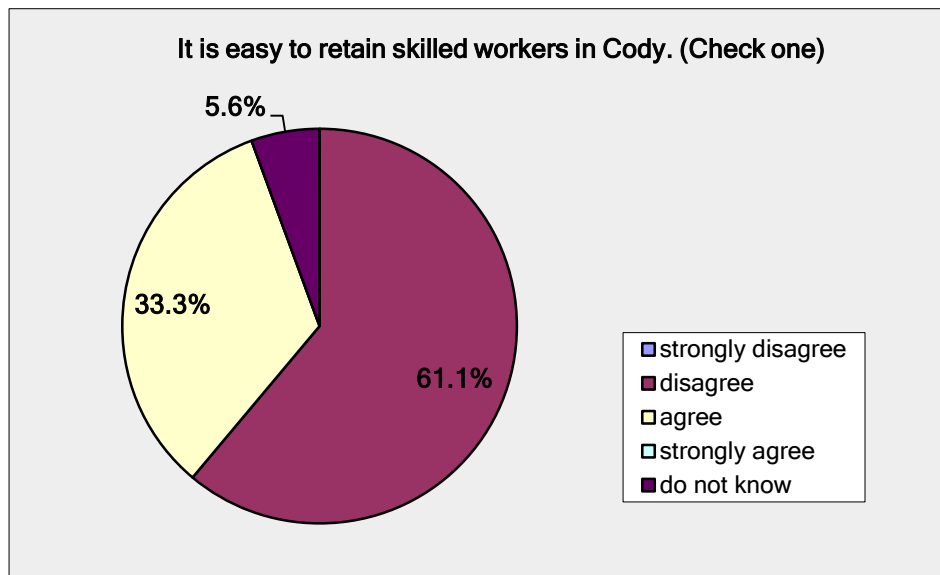
Question 35. Of the business-owners responding to the survey, most own businesses downtown or on the West Strip. Other businesses are located on Stampede Avenue, East Sheridan Avenue, on 2AB, outside city limits, or in-home.



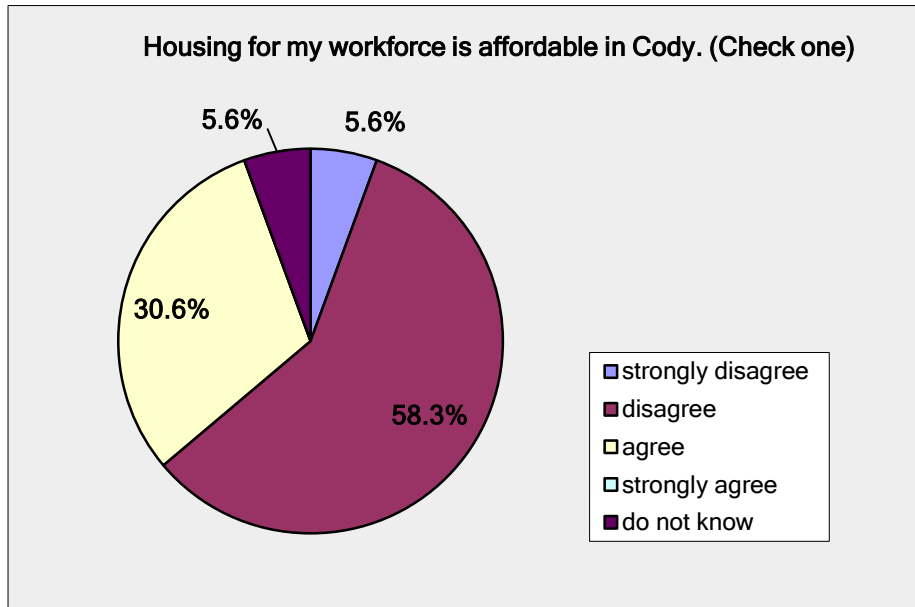
Question 36. The majority of business-owners disagreed that it is easy to attract skilled workers to Cody. Some have found that it is difficult for new residents to make ends meet due to a high cost of living in Cody. There was concern that many of the new workers brought in to Cody do not stay in town for long.



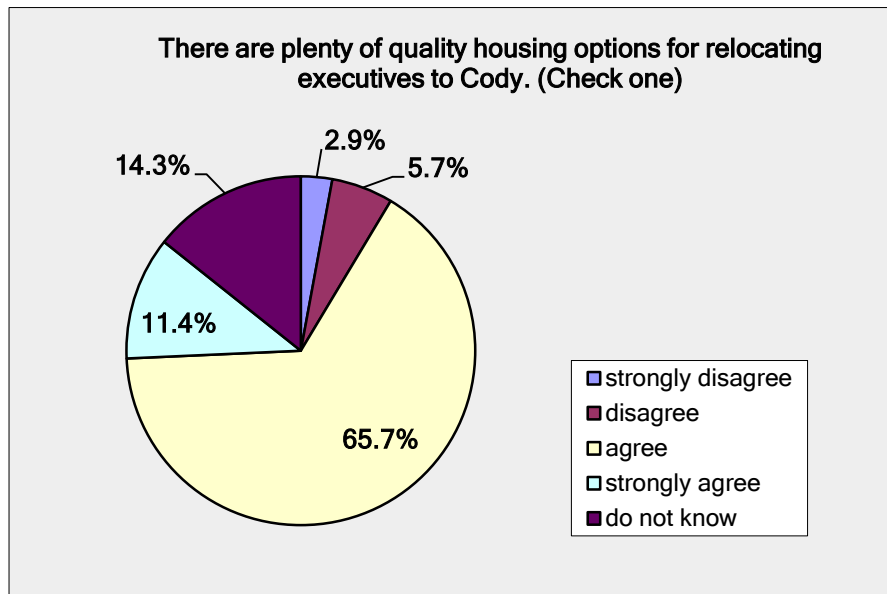
Question 37. Most of the business-owners surveyed have found that it is difficult to retain skilled workers in Cody. One respondent commented that this may be due to the seasonal nature of much of Cody's business.



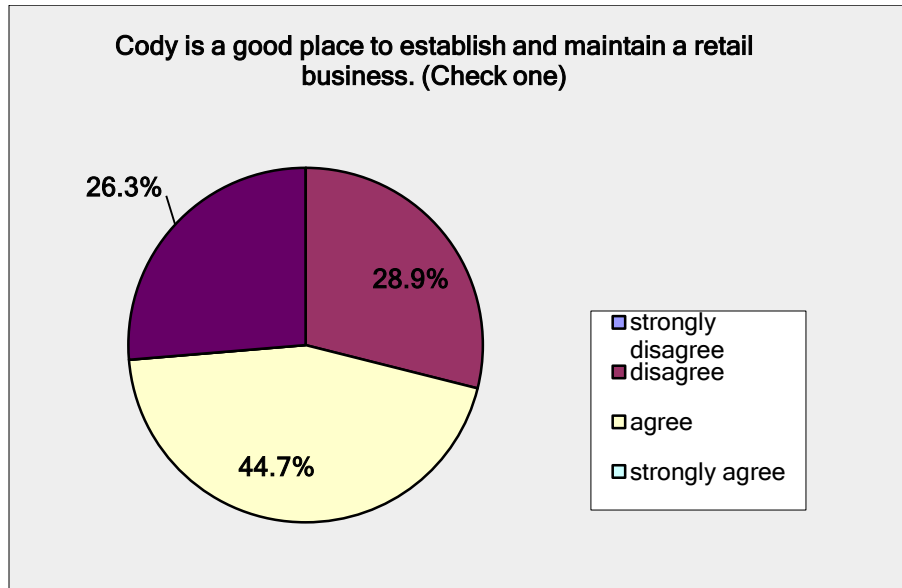
Question 38. The majority of business-owners responded that workforce housing is not affordable in Cody, noting that housing in other locations is less expensive. Respondents commented that adequate housing for low wage and seasonal workers is not available. There was a suggestion to provide affordable hookups with month-to-month rentals for seasonal workers (and not tourists) in trailers and RVs.



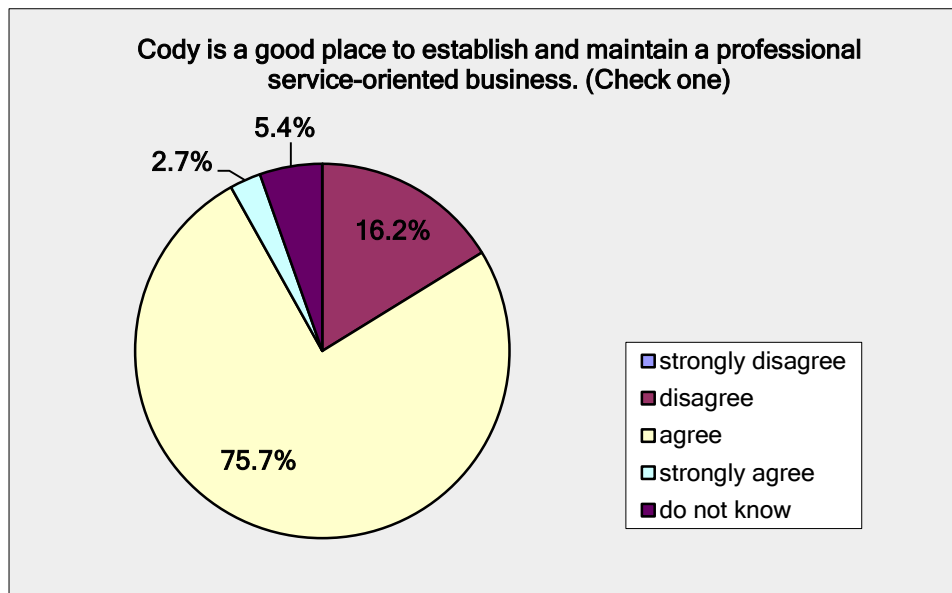
Question 39. In general, there is agreement that Cody offers adequate housing options for new executive level employees. One business-owner commented that this is not a high concern for Cody.



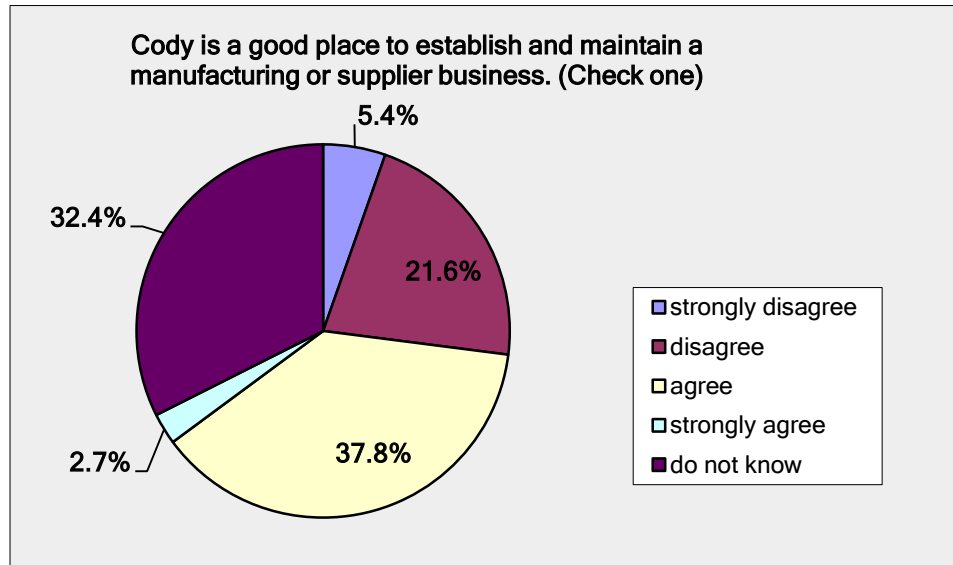
Question 40. There were mixed opinions about whether Cody is a good place to own a retail business, but respondents generally agreed. It was noted that it is difficult to run a seasonal retail business in Cody.



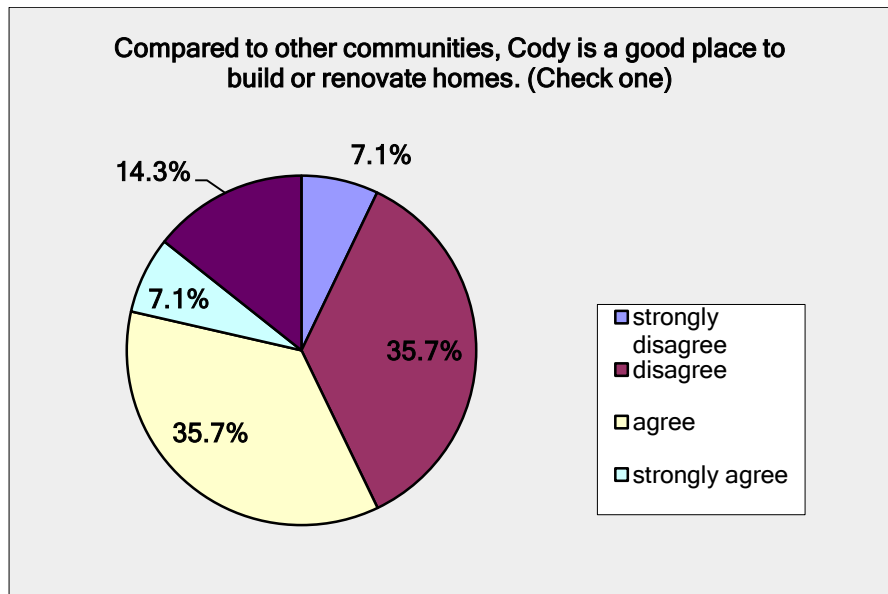
Question 41. Over 75 percent of business-owners felt that Cody is a good place to own a professional services business. However, respondents commented that since the downturn in the economy it is getting more difficult to operate a business and attract and retain quality employees in Cody. One respondent noted that in the past it has been difficult to work with the Chamber of Commerce to promote professional businesses.



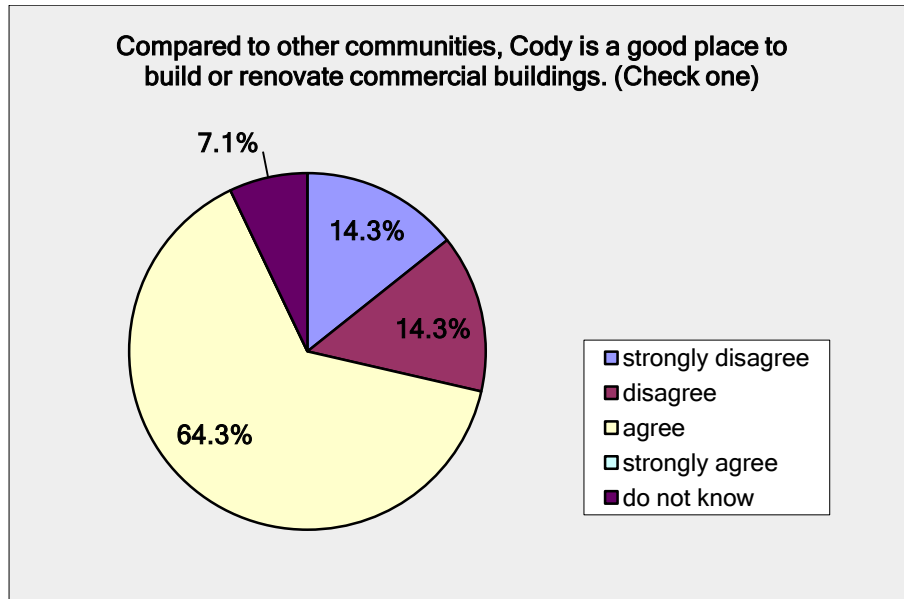
Question 42. Opinions differed on whether Cody is a good place to own a manufacturing or supplier business. Transportation of materials and manufactured goods was a concern. One commenter noted that there may be a potential for expansion in this sector, and another commented that if a business is not selling good locally, it makes more sense to locate in an area with lower business and living expenses.



Question 43. Developers were equally split on whether Cody is a good place to build or renovate homes. Some felt that the market is not currently in the right place for this type of development, and others felt that the regulations and permitting requirements on Cody stifle make it more difficult to develop.



Question 44. Most developers agreed that Cody is a good place to build or renovate commercial buildings. However, some felt that the City's regulations and permitting requirements make development more difficult in Cody compared to other communities.



KEY FINDINGS

This Community and Economic Development survey yielded informative and useful results for the Cody Master Plan Update. Based on the survey, Cody's high-quality recreation opportunities, a sense of community and its western heritage are the city's greatest assets. Respondents would generally recommend Cody as a place to live and own a business. However, it is difficult for the community to maintain a year-round economy and offer adequate job opportunities. As such, economic development rises to the top as the most important issue to address in the Cody Master Plan Update. Year-round recreation and tourism and high-tech and emerging technologies were identified as top economic priorities for Cody.

There are also housing, transportation and other needs that need to be addressed. Currently, there is a deficiency in attainable workforce housing, which was noted by both residents and business-owners. Business-owners surveyed felt that it is difficult to both attract and retain skilled workers for a variety of reasons, including housing. Residents are satisfied with the current parks and recreation amenities in Cody, but improvements to the pedestrian and bicycling system, including sidewalk improvements and trails, are priorities. There is a desire for more festivals and events, music and concerts, and children and youth activities to improve quality of life. The quality and variety of restaurants, general goods stores, and clothing and shoe retail stores also needs improvement.