Downtown Kalamazoo
Retail Market Analysis
Kalamazoo, Michigan

Prepared for:
City of Kalamazoo

Prepared by:
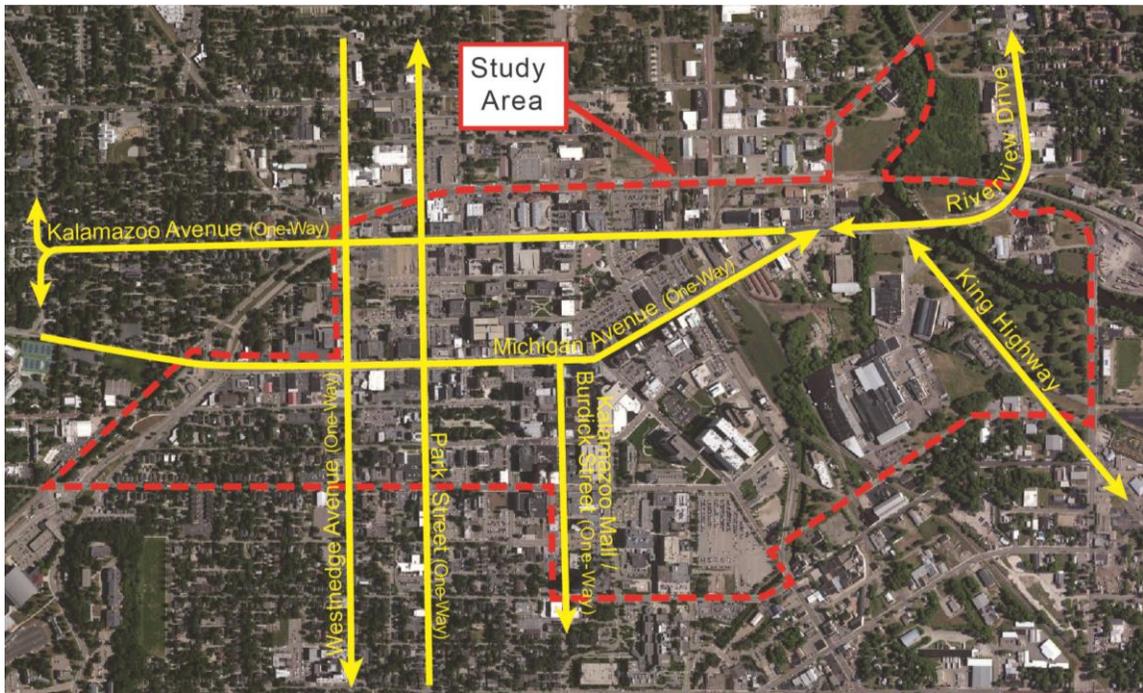## Gibbs Planning Group

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Draft

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INTRODUCTION

Figure 1: The Downtown Kalamazoo study area, shown above, can presently support an additional 27,800 sf of retail and restaurant development.

Executive Summary

This study finds that the Downtown Kalamazoo study area can presently support up to 27,800 square feet (sf) of new retail and restaurant development, generating nearly $5.3 million in sales. If developed as a single-site shopping center it would be considered a convenience-type center by industry standard definitions and could include 10 to 12 restaurants and shops. The demand could also be absorbed as infill into existing vacancies, more profitable businesses replacing hobby retailers or existing retailers achieving higher sales with business improvements.

Conversely, this study finds that the downtown retail market is currently underperforming by non-market conditions including difficult navigation in and around shopping areas, outdated parking management, limited marketing and a lack of relevance to university students. Many of these impediments have been identified in various studies dating to the 1980s and most recently in the 2009 Downtown Comprehensive Plan. The study area could support up to 156,500 sf (45 to 60 stores) of additional retail and restaurant space generating as much as $51.6 million in sales if the city were to implement the following 2009 Downtown Comprehensive Plan recommendations:

- Promote additional on-street parking
- Create an inviting pedestrian friendly streetscape
- Grow specialty retailers
- Establish the downtown as a primary shopping destination (through marketing)
- Develop a retail incubator program to assist with at least five start-ups
- Cluster businesses effectively
- Grow locally-owned businesses through recruitment and retention programs
- Mandate retail at ground level in retail emphasis zones
- Encourage downtown establishments to remain open for common and extend hours

- Assist in the development of three new student-oriented businesses
- Continue to support retail focused events.

In addition, GPG recommends the city implement the following physical and policy improvements to meet or exceed industry standards for downtown shopping districts:
- Return all streets to two-way traffic and implement traffic calming techniques
- Expand on-street parking in the downtown, especially in or near the mall
- Install parking meters along all commercial streets and offer two-hours of free parking in public parking garages
- Develop a business recruitment plan
- Develop a market-based merchandising plan for the study area
- Implement a comprehensive marketing plan for the downtown

Table 1: 2017 Supportable Retail

Retail Category	2017 Status Quo Estimated Supportable SF	Estimated Supportable SF with Improvements	No. of Stores
Retailers			
Apparel Stores	1,800 sf	26,500 sf	8 - 10
Miscellaneous Store Retailers	4,000 sf	17,900 sf	6 - 8
Department Store Merchandise	2,400 sf	14,400 sf	3 - 4
Specialty Food Stores	4,100 sf	12,300 sf	1 - 3
Electronics and Appliance Stores	- sf	10,400 sf	3 - 4
Pharmacy and Personal Care Stores	- sf	9,900 sf	1 - 2
Gift Stores	2,100 sf	9,400 sf	5 - 6
Book and Music Stores	1,100 sf	4,300 sf	1
Home Furnishings Stores	1,800 sf	3,300 sf	1 - 2
Beer, Wine and Liquor Stores	- sf	2,600 sf	1
Jewelry Stores	1,700 sf	2,300 sf	1
Shoe Stores	- sf	1,400 sf	1
Florists	- sf	1,100 sf	1
Total New Supportable Retail	**19,000 sf**	**115,800 sf**	**33 - 44**
Restaurants			
Full-Service Restaurants	3,800 sf	13,400 sf	3 - 4
Limited-Service Eating Places	- sf	11,600 sf	4 - 5
Bars, Breweries and Pubs	2,500 sf	9,100 sf	2 - 3
Special Food Services	2,500 sf	6,700 sf	3 - 4
Total New Supportable Restaurant	**8,800 sf**	**40,700 sf**	**12 - 16**
Retailer & Restaurant Totals	**27,800 sf**	**156,500 sf**	**45 - 60**

Table 1: *With improvements, the study area could support up to 156,500 sf of new retail and restaurant development.*

The supportable retail with improvements includes 8-10 apparel stores, 5-6 gift stores, 4-5 limited-service eating places, 3-4 full-service restaurants, 3-4 stores selling department store merchandise, 3-4 electronics and appliance stores, 3-4 special food services stores, 2-3 drinking establishments, 1-3 specialty food stores, 1-2 pharmacy and personal care stores, 1-2 home furnishings stores and a variety of other retail. Although the trade area will not support a grocery store downtown, GPG recommends that the city consider a small to medium-size, year-round

public market, such as those in Bay City, Flint, Grand Rapids and the Oxbow Market in Napa. A summary of the 2017 total new supportable retail can be found in Table 1.

The study area is Kalamazoo's Central Business District, southwest Michigan's retail, employment, entertainment, civic and residential hub for the surrounding region. It is centered on Michigan Avenue and bound by Willard Street, Mills Street, Walnut Street and I-94/US-131. Regionally, it is located in the southwest corner of the state of Michigan approximately 40 miles from both the state's southern border and its eastern border on Lake Michigan. It is 45 miles south of Grand Rapids, 60 miles southwest of Lansing and 20 miles west of Battle Creek. Access to the study area is excellent, via Interstate 94 for east-west visitors, and north-south via US-131.

This study further finds that the study area has a primary trade area population of 237,300 persons, increasing to 244,900 persons by 2022 with a projected annual growth rate of 0.63 percent. Average and median household income in the primary trade area ($64,400 and $45,500, respectively) is slightly more than the total trade area, while the percentage of those holding a bachelor's or graduate degree (22.0 percent and 14.6 percent, respectively) is higher than the total trade area and the state. The primary trade area has a labor base of 158,600 employees.

Background

Gibbs Planning Group Inc. (GPG) has been retained by the City of Kalamazoo to conduct an independent retail market analysis for its downtown Central Business District. Kalamazoo is located in western Michigan, approximately 45 miles south of Grand Rapids.

Figure 2: The city's predominance of one-way streets in the downtown is detrimental to robust commerce and would be better served with implementation of the 2009 Kalamazoo Comprehensive Plan's proposed two-way conversion plan.

The study area encompasses Kalamazoo Mall, which was the first pedestrian shopping mall in the United States when it opened in 1959. Designed by legendary mall architect Victor Gruen, it is located in the heart of downtown. The two blocks of Burdick from Eleanor Street to W. Michigan Avenue are designated North Kalamazoo Mall; the two blocks south of W. Michigan to W. Lovell Street, South Kalamazoo Mall. As proposed by Victor Gruen, the city also incorporated a north-south one-way couplet (Westnedge Avenue and Park Street) and an east-west one-way couplet (Michigan Avenue and Kalamazoo Avenue). The one-way couplets facilitated expedient movement through the downtown, often at the expense of retailers and pedestrian comfort. The mall underwent renovations in the 70s, but by the 1990s the mall suffered from a limited selection of shops, inadequate nearby parking and increased crime. A proposal to reopen the two blocks of the Mall south of W. Michigan to auto traffic was approved in May 1997. The street officially reopened in October 1998, albeit one way. The one-way couplets remain, although their conversion has been the subject of study since the 1980s.

More than 130 mostly local or regional retailers & restaurants beckon shoppers today. The retailers include: Alfred E. Bike, Arcadia Pharmacy, Dobbs Optical, Fireplace & Grill Shop, Gazelle Sports, Homestead Furniture, Lana's Fashion Boutique, Maggiknits, Milan the Style Shop, Morrison Jewelers, Newman's Bookshop, Okun Brothers Shoes, Pop City Popcorn, Stewart & Clarke Fine Furniture, URBAN, V&A Bootery and Van Sweden Jewelers. Among the full and limited-service restaurants are Bell's Eccentric Café, Bimbo's Pizza, Central City Tap House, Comensoli's Italian Bistro & Bar, Epic Bistro, Food Dance, The Gatsby, London Grill – Singapore, Mangia Mangia, The Park Club, Rustica, Sarkozy Bakery, Union Cabaret & Grill, Webster's Prime and Zazio's.

Figure 3: *The Downtown Kalamazoo study area is located in western Michigan.*

GPG addressed the following issues in this study:

- What is the existing and planned retail market in the study and trade areas?

- What are the primary and total trade areas for Downtown Kalamazoo?

- What are the population, demographic and lifestyle characteristics in the trade areas, currently and projected for 2022?

- What is the current and projected growth for retail expenditures in the primary trade area, now and for the next five years?

- How much additional retail square footage is supportable in the Downtown Kalamazoo study area and what retail uses should be encouraged? What sales volumes can development achieve in or near the study area?

Figure 4: *The Downtown Kalamazoo study area in southwestern Michigan. Kalamazoo is approximately equidistant to Detroit and Chicago (150 miles) and less than 50 miles from Grand Rapids.*

Methodology

To address the above issues, GPG conducted an evaluation of most major existing shopping centers and retail concentrations in the primary trade area surrounding the Downtown Kalamazoo study area. During the week of April 10, 2017 GPG visited and assessed most major and planned retail concentrations in the area.

GPG also visited the area during the daytime, as well as the evening, to gain a qualitative understanding of the retail gravitational patterns and traffic patterns throughout the study area. GPG then defined a trade area that would serve the retail in the study area based on the field evaluation, geographic and topographic considerations, traffic access/flow in the area, relative retail strengths and weakness of the competition, concentrations of daytime employment, and the retail gravitation in the market, as well as our experience defining trade areas for similar markets. Population, consumer expenditure and demographic characteristics of trade area residents were

collected by census tracts from the U.S. Bureau of the Census, U.S. Bureau of Labor Statistics, and Esri and updated based on information gathered from local planning sources.

Finally, based on the projected consumer expenditure capture (demand) in the primary trade area of the gross consumer expenditure by retail category, less the current existing retail sales (supply) by retail category, GPG projects the potential net consumer expenditure (gap) available to support new development. The projected net consumer expenditure capture is based on household expenditure and demographic characteristics of the primary trade area, existing and planned retail competition, traffic and retail gravitational patterns and GPG's qualitative assessment of the study area.

Net potential captured consumer expenditure (gap) is equated to potential retail development square footage, with the help of retail sales per square foot data provided by Dollars and Cents of Shopping Centers (Urban Land Institute and International Council of Shopping Centers), qualitatively adjusted to fit the urbanism and demographics of the study area.

For the purposes of this study, GPG has assumed the following:

- Other major community retail centers may be planned or proposed, but only the existing retail is considered for this study. The quality of the existing retail trade in the study area is projected to remain constant. Gains in future average retail sales per sf reflect higher sales per sf in newly developed retail and selected increases in sales per sf by individual retail categories.

- No new major regional retail centers will be developed within the trade area of this analysis through 2022 for the purposes of this study.

- Annual population growth for the primary trade area is estimated to be 0.63 percent throughout the five-year period of this study.

- Employment distribution is projected to remain constant, without a significant spike or decline in employment by NAICS categories.

- The projected lease and vacancy rate model is based on our proprietary econometric model of the relationship between changes in employment and changes in vacancy and lease rates. Data was gathered from the U.S. Census Bureau, Esri, CBRE and local brokerage services.

- The region's economy will continue at normal or above normal ranges of employment, inflation, retail demand and growth.

- Retailers will exemplify retail industry best practices in store management, merchandising, store layout, general appearance, product selection, marketing and customer service.

- Parking for the Downtown will meet or exceed the industry standards.

- Visibility of any new retail in the Downtown study area is also assumed very good, with signage as required to assure easy visibility of the retailers.

- Any new construction in the study area will be planned, designed, built and managed to the best practices of the American Planning Association, American Institute of Architects, American Society of Landscape Architects, the Congress for the New Urbanism, the International Council of Shopping Centers and The Urban Land Institute.

Trade Area

Based on GPG's field evaluation, the existing retail hubs, population clusters, highway access, and the retail gravitation in the market, as well as our experience defining trade areas for similar mixed-use developments, GPG determined that consumers in the primary trade area generate demand to support a wide variety of retailers. This potential will continue to grow over the next five years, sustained by an annual population growth rate of 0.63 percent and annual household income growth of 2.9 percent.
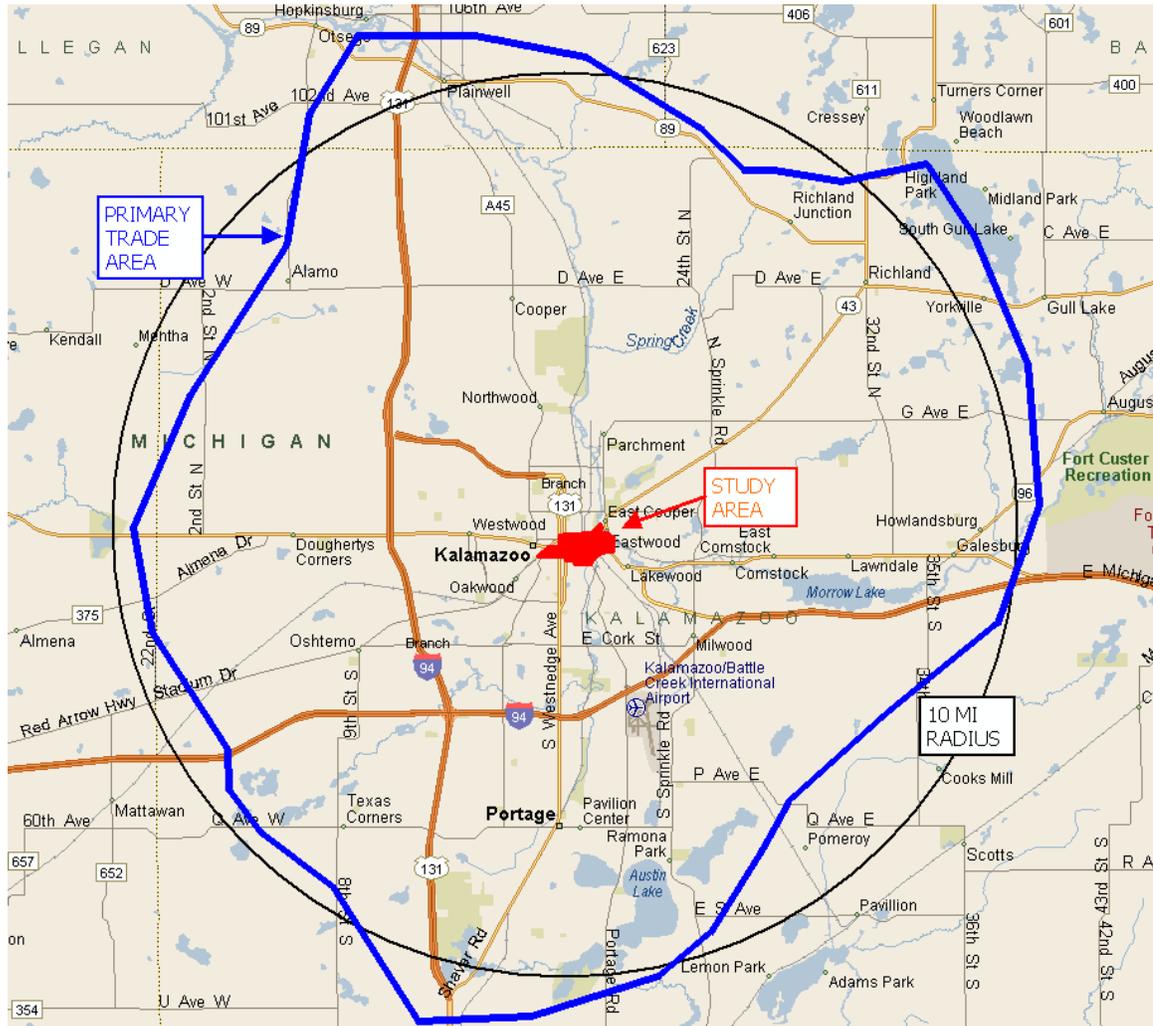
Figure 5: *The Downtown Kalamazoo primary trade area, outlined in blue, encompasses approximately 308 square miles.*

The primary trade area is the consumer market where the study area has a significant competitive advantage because of access, design, lack of competition and traffic and commute patterns. This competitive advantage equates to a potential domination of the capture of consumer expenditure by the retailers in the study area.

GPG defined a primary trade area by topography, vehicular access, strength of retail competition and residential growth patterns instead of standardized "drive-times." Consumers inside the primary trade area will account for up to 60 to 70 percent of the total sales captured by retailers in the study area.

The following borders approximately delineate the primary trade area:

- North: 106th Avenue
- South: U Avenue
- East: 38th Street
- West: Kalamazoo/Van Buren County Line.
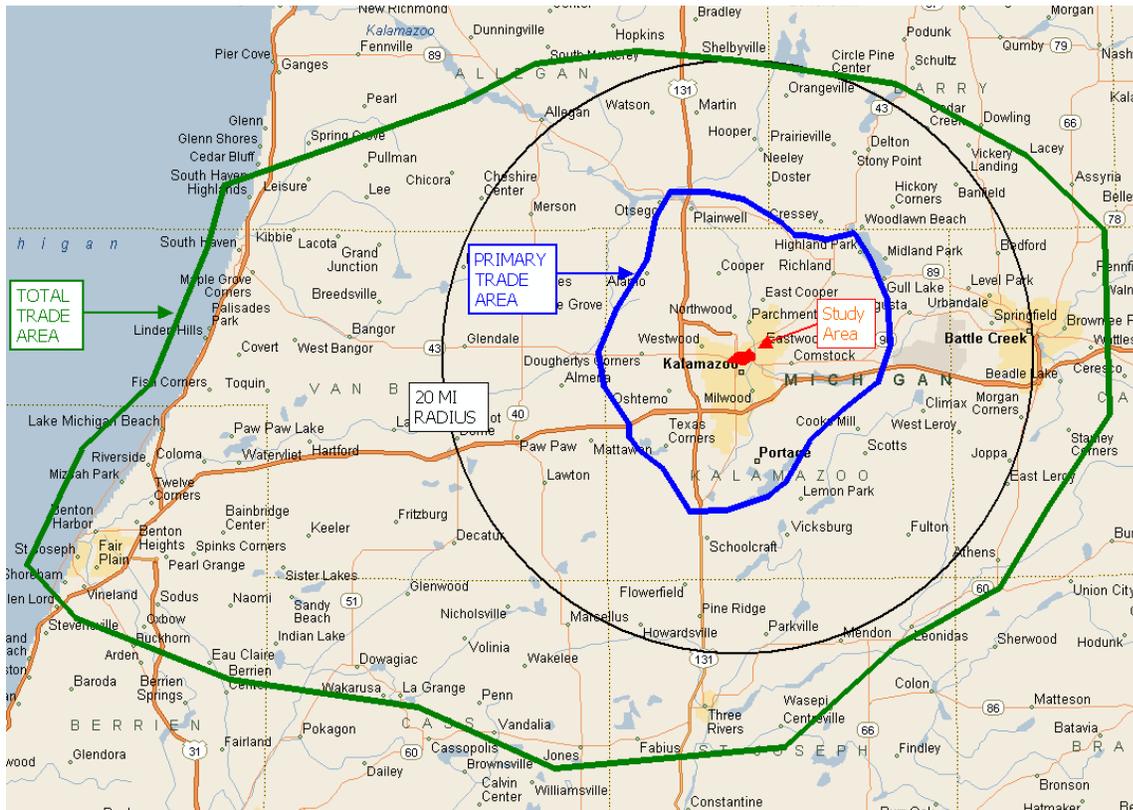
Figure 6: *The total trade area, outlined in green, encompasses nearly 2,700 square miles of southwestern Michigan.*

The total trade area (Figure 6) extends to include residents and workers who, because of convenient access and a lack of meaningful competition, may currently or in the future contribute expenditure to study area retailers. The boundaries of the total trade area extend:

- North to 124th Avenue
- East to 11 Mile Road
- South to Harvey Street
- West to Lake Michigan.

Residents who live in the total, but not within the primary, trade area will shop in Downtown Kalamazoo occasionally, but the area will not be their primary shopping destination. Consumer expenditure by these residents will account for approximately 15 to 20 percent of retail sales.

Demographic Characteristics
Using data from Esri (Environmental Systems Research Institute) and the U.S. Census Bureau, GPG obtained the population and demographic characteristics, most recent (2017) and projected for 2022, for the defined trade areas as well as regional statistics.

The Downtown Kalamazoo primary trade area has an estimated 2017 population of 237,300 persons, which is estimated to grow to 244,900 by 2022, at an annual projected increase of 0.63 percent over the total five-year period. This annual growth rate is nearly twice that of the total trade area's projected annual increase of 0.35 percent. The number of households in the primary trade area is 95,700, holding 2.39 persons-per-household, and is projected to increase to 98,700 per household by 2022, at an annual increase of 0.62 percent over the five-year period.

Table 2: Demographic Comparisons

Demographic Characteristic	Primary Trade Area	2-Mile Radius	Total Trade Area	State of Michigan
2017 Population	237,300	44,700	608,000	9,954,600
2017 Households	95,700	15,500	240,900	3,921,100
2022 Population	244,900	45,700	618,700	10.067.300
2022 Households	98,700	15,900	245,200	3,975,700
2017-2022 Annual Population Growth Rate	0.63%	0.44%	0.35%	0.23 %
2017-2022 Annual HH Growth Rate	0.62%	0.48%	0.36%	0.28%
2017 Average Household Income	$64,400	$44,200	$62,100	$68,100
2017 Median Household Income	$45,500	$28,800	$45,800	$50,700
2022 Average Household Income	$70,800	$47,700	$68,400	$75,000
2022 Median Household Income	$52,200	$28,800	$52,000	$56,700
% Households w. incomes $75,000 or higher	29.4%	16.5%	28.3%	32.5%
% Bachelor's Degree	22.0%	15.2%	16.5%	16.8%
% Graduate or Professional Degree	14.6%	11.7%	10.2%	11.1%
Average Household Size	2.39	2.47	2.46	2.48
Median Age	34.3	26.5	38.4	39.9

Table 2: *This side-by-side table compares and contrasts primary trade area demographic statistics with those of a 2-mile radius area, the total trade area and the State of Michigan.*

The median and average household incomes in the primary trade area ($45,500 and $64,400, respectively) are similar to the total trade area incomes of $45,800 and $62,100. Additionally, the percentage of households with incomes over $75,000 is 29.4 percent, as compared to 28.3 percent in the total trade area, while the percentage of those holding a graduate degree is 14.6 percent, higher than the total trade area (10.2%) and the state (11.1%). The median age in the primary trade area is 34.3.

The total trade area includes a population of 608,000 and 240,900 households, growing to 618,700 and 245,200, respectively, by 2022. This area has an average household size of 2.46 and median age of 38.4.

A closer-in two-mile radius area reports a population of 44,700, projected to grow at an annual rate of 0.44 percent to 45,700 in five years. Its 15,500 households will grow to15,900 by 2022 at an annual rate of 0.48 percent. Average and median households in 2017 are lower than the primary trade area at $44,200 and $28,800, respectively; by 2022 the average household income will have increased to $47,700 annually, while the median income remains stagnant. Households with incomes over $75,000 is lowest of the comparative geographies at 16.5 percent. Bachelor's and graduate degrees have been earned by 15.2 percent and 11.7 percent of the population, respectively. This area's current household size is 2.47 and holds the youngest median age at 26.5 years.
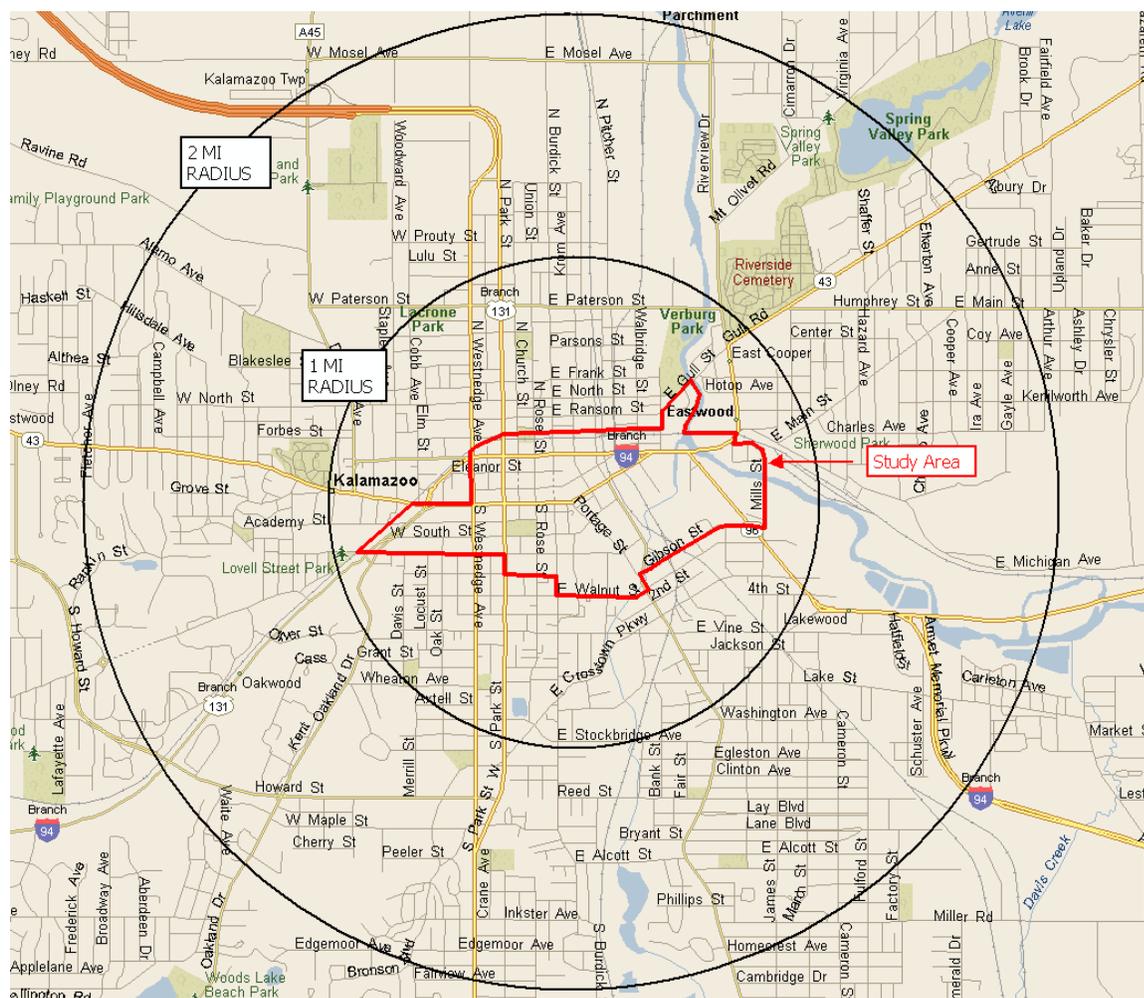
Figure 7: Two-mile radius map of the Downtown study area shows the historic core and surrounding neighborhoods.

On the largest scale, the state of Michigan includes 9,954,600 people and 3,922,100 households. The former is expected to grow at an annual rate of 0.23 percent, and the latter is projected to grow at an annual rate of 0.28 percent to 2022, when the state's projected population will be 10,067,300 with 3,975,700 households. This projected growth will be slower than the trade areas

and 2-mile radius area, at 23.0 percent and 28.0 percent, respectively. The 2017 state median and average household income statistics are greater than the three other comparison areas at $50,700 and $68,100, respectively. The state's figures for average household size of 2.48 persons, median age of 39.9 years, and 32.5 percent of the population that earned over $75,000 annually in 2017 is highest of all the comparative geographies. The percentage of residents holding a bachelor's degree is 16.8, while 11.1 percent have earned a graduate degree.

Of all households in the primary trade area, 54.9 percent are owner-occupied, a number that will stay flat at 54.8 percent by 2022. Renter-occupied households have increased from 35.3 percent in 2010 to 36.3 percent in 2017, and this statistic is projected to taper off to 36.5 percent by 2022. The vacancy rate is projected to decrease correspondingly from 8.8 percent in 2017 to 8.7 percent in 2022. The average home value of $183,200 is expected to increase to $207,500 in five years, while the median home value of $144,000 is expected to increase to $176,800 by 2022.

Tapestry Lifestyles

Esri (Environmental Systems Research Institute) has developed Tapestry Lifestyles, which is an attempt to create 65 classifications, or lifestyle segments, that help determine purchasing patterns. These segments are broken down to the U.S. Census Block Group level and used by many national retailers to help determine future potential locations. The following Table 3 details the top Tapestry Lifestyles found in the primary trade area.

Table 3: Tapestry Lifestyles

Lifestyle	Primary Trade Area Statistics	Short Description
Traditional Living	Population 23,400 Households 12,300 Median HH Income **$37,000** 12.8% Primary Trade Area Households Market Share 2.0% National Market Share	*Traditional Living* residents live primarily in low-density, urban clusters of metro areas throughout the Midwest and South. Households are a mix of married-couple families and singles. This is a younger market–beginning householders who are juggling the responsibilities of living on their own or a new marriage, while retaining their youthful interests in style and fun. Unemployment for this group is higher at 10.9%, while labor force participation is also a bit higher at 64.6%. The primary sources of employment for these residents are the manufacturing, retail trade and health care sectors. They tend to carry credit card balances, have student loans, and pay bills in person. *Traditional Living* residents are cost-conscious consumers that are comfortable with brand loyalty - unless the price is too high. Grocery shopping is done at discount stores such as Walmart supercenters; Kmart is a favorite for apparel and household and personal care products. Half of households use cell phones exclusively and are connected and comfortable with the Internet. They're fast food devotees. They enjoy outdoor activities such as camping and visiting the zoo.

Lifestyle	Primary Trade Area Statistics	Short Description
Green Acres	Population 21,400 Households 10,400 Median HH Income **$72,000** 10.8% Primary Trade Area Households Market Share 3.2% National Market Share	The *Green Acres* lifestyle embraces country living and self-reliance. They live in rural enclaves in metropolitan areas, primarily but not exclusively, in older homes with acreage. Their homes are single-family and owner-occupied, with a median value of $197,000. This is an older market, primarily married couples, most with no children. Sixty percent are college educated and consequently unemployment is low (6%) and the labor force participation rate is high at (67.4%). Income is derived from wages and salaries, self-employment (more than 15% of households), investments (30% of households), and from retirement. These homeowners favor DIY home improvement projects and gardening. They enjoy a variety of outdoor sports such as hunting and fishing, motorcycling, hiking, camping, and even golf. They purchase a variety of vehicles from trucks and SUVs to ATVs and motorcycles, preferably late model. Media of choice are provided by satellite service, radio, and television. Physical fitness, from working out on home exercise equipment to playing a variety of sports, is avidly pursued. Residents are active in their communities and a variety of social organizations, from fraternal orders to veterans' clubs.
College Towns	Population 16,800 Households 8,700 Median HH Income **$28,000** 9.1% Primary Trade Area Households Market Share 0.9% National Market Share	About half the residents of *College Towns* are enrolled in college, while the rest work for a college or the services that support it. These are nonfamily households with many students living alone or with roommates. Dwellings are a mix of densely developed student housing and dorms with local residences. Half of the housing stock is comprised of off-campus, low rent apartments. Over three-quarters of the households are renter occupied, while one-third of homes are single family, mostly occupied by local residents who own their homes. Students are thrifty due to limited incomes, except for a tendency to splurge on the latest fashions. They don't eat healthy or see a doctor regularly. They prefer cars that get good gas mileage and environmentally friendly products. This group uses computers and cell phones to watch TV and movies, shopping, school work, news and social media. This market is bike and pedestrian friendly, like to go out to the movies and for drinks, and are politically liberal.

Lifestyle	Primary Trade Area Statistics	Short Description
Rustbelt Traditions	Population 13,400 Households 7,000 Median HH Income **$49,000** 7.3% Primary Trade Area Households Market Share 2.2% National Market Share	*Rustbelt Traditions* residents are married-couple families and singles living in older industrial cities in states surrounding the Great Lakes, Most households are without children, reflecting the aging population. While varied, the work force is primarily white collar, with a higher concentration of skilled workers in manufacturing, retail trade, and health care. They live in older developments of single-family homes; nearly three-quarters own their homes. *Rustbelt Traditions* represents a large market of stable, hard-working consumers with modest incomes but above average net worth. Labor force participation is slightly higher than the U.S. at 67%, although nearly 30% of households collect social security and 20% are drawing income from retirement accounts. These are family-oriented consumers who have been in the same area for years and value time spent at home. They favor American-made products and read newspapers. They enjoy watching TV; many households have more than four TVs. Online gaming is the dominant Internet use. Radio is typically tuned to classic rock stations.
Dorms to Diplomas	Population 15,200 Households 5,000 Median HH Income **$17,000** 5.2% Primary Trade Area Households Market Share 0.5% National Market Share	*Dorms to Diplomas* are students on their own for the first time. School and part-time work take up much of the day, but the remainder is filled with socializing and fun with friends. This youngest market reports half of its population is aged 20-24. Housing caters to young renters with a mix of dorms, and on- and off-campus housing. Eighty percent of housing is apartments, with many older homes converted into multi-family units. These residents walk, bike and car pool to class. *Dorms to Diplomas* are impulse buyers who buy trendy clothes on a budget. Vehicles are used, imported subcompact cars. This is the first online generation - they use a computer for just about everything including news, entertainment, shopping, blogging, social media, TV, movies, and homework. This segment is active, participating in sports and yoga. Frozen dinners and fast food are go-to meals.

Table 3: *The top five Tapestry Lifestyle groups profiled above portray a large number of students and singles with few responsibilities in the primary trade area.*

The trade area's most common tapestry lifestyle group is *Traditional Living,* representing 12.8 percent of the primary trade area households. Residents of these neighborhoods earn a median household income of $37,000. Their average household size is 2.50, with a median age of 34.8 years. These consumers live in low-density, settled neighborhoods in urban clusters of metro areas in the Midwest, and married couples are the dominant household type, followed by single-parent and single-person households. More than 70 percent have completed high school or some college.

While unemployment is higher at 10.9 percent, labor force participation is also higher at 64.6 percent. Over three quarters of this segment's households derive income from wages and salaries. They are connected to the Internet, while TV is seen as the most trusted media. They shop at discount stores such as Walmart and Kmart, while frequenting convenience stores for fueling and lottery ticket purchases.

Green Acres is an older market segment, primarily married couples with an average age of 43.0, and their average household size of 2.69 reflects that most households have no children. They live in rural enclaves of metropolitan areas, most often in single-family, older homes with acreage and a median value of $197,000. Their median household income is $72,000. Unemployment is low at six percent, and labor force participation is high at 67.4 percent. More than 15 percent of households are self-employed.

These consumers are focused on quality and durability, and comfortable with debt such as home and auto loans. They are do-it-yourselfers, maintaining and remodeling their homes, and enjoy gardening, outdoor sports and golf. These households prefer late model vehicles, from trucks and SUVs to motorcycles. They are active in their communities and social organizations.

Tapestry Lifestyles Segmentation

Legend:
- Traditional Living (12B)
- Green Acres (6A)
- College Towns (14B)
- Rustbelt Traditions (5D)
- Dorms to Diplomas (14C)
- Old and Newcomers (8F)
- In Style (5B)
- Salt of the Earth (6B)
- Middleburg (4C)
- Retirement Communities (9E)

Figure 8: Pie chart shows the relative proportions of the top Tapestry Lifestyle segments found in the primary trade area.

College Towns represents the third largest group in the primary trade area. About half these residents are enrolled in college, while the rest work for a college or its supporting services. With a young median age of 24.3, their median household income is $28,000. The average household size of 2.12 reflects nonfamily households, with many students living alone or with a roommate. Dwellings are densely developed student housing and dorms mixed with local residences. Single-family homes make up one-third of the market, usually occupied by local residents who own their own home.

This young demographic's limited incomes drive thrifty purchases resulting in fast food and infrequent doctor visits. Just the same, many students are new to managing their own finances and tend to make impulse buys and splurge on the latest fashions. They prefer environmentally friendly products and vehicles with good gas mileage. They own a laptop and MP3 player, watch movies and TV online, and use the Internet for keeping socially connected, blogging, paying bills and downloading music. They use cellphones exclusively and customize them. Popular activities include backpacking, Pilates, Frisbee, and going out to the movies and for drinks.

Employment Base

The employment dynamic found in the primary trade area reflects a strong *Services* and *Retail* sector foundation, with additional elevated levels of *Manufacturing* and *Finance, Insurance and Real Estate (FIRE)*. As shown in Table 4, the *Services* (39.5%) and *Retail Trade* (20.2%) categories account for the majority of employment (59.7%) found in the primary trade area. *Services* is the highest employment sector in all the comparison geographies and categories. Within *Services*, the leading subcategories after the catchall *Other Services* (14.7%) are *Education Institutions and Libraries* (10.6%) and *Health Services* (9.8%).

Retail Trade (20.2%) is the second-leading sector of employment in the primary trade area, as it is in the total trade and state of Michigan areas. The dominant categories under *Retail Trade* are *Eating and Drinking Places* (5.9%) and *Food Stores* (3.1%).

Manufacturing (10.6%) and *Finance, Insurance and Real Estate (FIRE)* (10.3%) are the two other notable employment segments in the primary trade area.

Table 4: Employment Comparison by Sector

Sector	2-Mile Radius	Primary Trade Area	Total Trade Area	State of Michigan
Agriculture and Mining	0.3%	**1.3%**	1.8%	1.5%
Construction	1.6%	**3.9%**	3.5%	3.8%
Manufacturing	5.8%	**10.6%**	13.7%	11.9%
Transportation	3.3%	**2.4%**	2.5%	2.7%
Communication	0.5%	**0.7%**	0.7%	0.8%
Utility	0.3%	**0.2%**	0.4%	0.6%
Wholesale Trade	1.6%	**6.9%**	5.9%	4.7%
Retail Trade	8.3%	**20.2%**	19.6%	20.9%
Finance, Insurance and Real Estate	18.3%	**10.3%**	6.4%	6.1%
Services	53.2%	**39.5%**	39.6%	41.3%
Government	6.4%	**3.7%**	5.7%	5.5%
Other	0.4%	**0.3%**	0.2%	0.2%

Table 4: *The Services sector is the dominant sector of employment in the primary trade area, employing nearly 62,700 workers.*

Consumer expenditure from daytime employment compliments that captured in the evenings and on weekends by households in the trade area. "*Office Worker Retail Spending in a Digital Age*", published by the International Council of Shopping Centers in 2012, provides insight into the impact of office worker employment. Weekly office worker expenditure, adjusted for 2017 dollars, is estimated at $180. Weekly non-office worker expenditure, in 2017 dollars, is estimated at 37 percent of office workers. Non-office workers are estimated to have slightly less disposable income, to have multiple work locations including at home and typically are on the road more during their workweek. Retail purchases (general merchandise, apparel, home furnishings, electronics, grocery and convenience items) make up the majority of the office worker dollars, at $120 per week. Restaurant expenditures (full service, limited service and drinking places) account for the balance at $60 per week.

Annualized, each office worker expends $9,360 before, during and after work. Some of this potential expenditure can be captured by future additional Downtown retailers to supplement the demand generated by trade area households.

Table 5: Drive Time and Trade Area Employment by Industry Sector

Employment Sector	5-Minute Drive-time	10-Minute Drive-time	Primary Trade Area
Agriculture & Mining	50	700	2,000
Construction	600	2,000	6,100
Manufacturing	1,900	5,900	16,700
Transportation	700	2,100	3,900
Communication	50	600	1,100
Utility	60	300	400
Wholesale Trade	500	2,100	11,000
Retail Trade	3,000	9,200	32,100
Home Improvement	100	500	1,700
General Merchandise Stores	30	550	3,300
Food Stores	300	1,300	4,900
Auto Dealers, Gas Stations, Auto Aftermarket	200	550	2,900
Apparel & Accessory Stores	70	200	1,200
Furniture & Home Furnishings	200	400	1,500
Eating & Drinking Places	1,600	4,200	11,800
Miscellaneous Retail	500	1,500	4,800
Finance, Insurance, & Real Estate	9,200	10,800	16,400
Banks, Savings, & Lending Institutions	300	600	1,500
Securities Brokers	200	300	1,100
Insurance Carriers & Agents	200	300	1,600
Real Estate, Holding, Other Investment	8,500	9,600	12,100
Services	15,800	37,400	62,700
Hotels & Lodging	600	800	1,400
Automotive Services	200	580	1,700
Motion Pictures & Amusements	400	1,180	2,800
Health Services	7,200	9,890	15,500
Legal Services	700	735	1,100
Education Institutions & Libraries	1,700	12,426	16,800
Other Services	5,000	11,735	23,400
Government	2,900	4,500	5,800
Other	200	300	400
Total Employment	35,000	75,900	158,600

Table 5: "Services" is the largest employment sector category within a ten-mile drive-time of the study area, with elevated levels in the "Retail Trade," "Manufacturing" and "FIRE" (Finance, Insurance and Real Estate) sectors.

For the purposes of this study, an hour lunch break for area workers was assumed and a ten-minute drive time boundary was used to estimate the spending potential of workers near the study area. The annual impact of the 75,900 workers within a ten-minute drive time is $147.3 million in prepared food and beverage establishments, $171.8 million in retail goods sales, $73.6 million in

grocery purchases, and $49.1 million in convenience items, totaling $441.9 million in total worker expenditure before, during and after the workday. Detailed results are found in Table 6.

Table 6: 10-Minute Drive Time Worker Expenditure

Retail Category	Weekly Expenditure	Annual Expenditure	Office Worker Expenditure 30,400	Non-Office Worker Expenditure 45,450	Total Expenditure
Retailers					
Limited & Full Service Restaurants	$44	$2,288	$69,555,200	$38,476,152	$108,031,352
Drinking Places	$16	$832	$25,292,800	$13,991,328	$39,284,128
General Merchandise, Apparel, Home, Electronics	$70	$3,640	$110,656,000	$61,212,060	$171,868,060
Grocery	$30	$1,560	$47,424,000	$26,233,740	$73,657,740
Convenience	$20	$1,040	$31,616,000	$17,489,160	$49,105,160
Totals	**$180**	**$9,360**	**$284,544,000**	**$157,402,440**	**$441,946,440**

Table 6: *Employees within a ten-minute drive of the study area could expend $830.3 million dollars annually.*

Further research, including focus groups, are recommended to fully understand the existing policies and physical conditions that are limiting daytime worker shopping and dining.

TRADE AREA CHARACTERISTICS

Market analytics provided by CoStar show mixed trends, but suggest the availability of quality leasable space is tightening.

Table 7: Kalamazoo Retail Market Conditions

Availability	Survey	5-Year Avg	Inventory	Survey	5-Year Avg
NNN Rent Per SF	$10.94	$11.12	Existing Buildings	66	66
Vacancy Rate	14.0%	15.3%	Existing SF	1,597,151	1,595,651
Vacant SF	223,078	244,467	12 Mo. Const. Starts	17,800	6,560
Availability Rate	26.3%	20.8%	Under Construction	17,800	2,890
Available SF	425,433	332,767	12 Mo. Deliveries	0	3,333
Sublet SF	10,800	4,766			
Months on Market	11.9	25.5			

Demand	Survey	5-Year Avg	Sales	Past Year	5-Year Avg
12 Mo. Absorption SF	-37,614	29,008	Sale Price Per SF	$63	$40
12 Mo. Leasing SF	40,834	53,131	Asking Price Per SF	$107	$74
			Sales Volume (Mil.)	$1.1	$1.6
			Cap Rate	-	8.5%

Table 7: *The vacancy rate in the Kalamazoo market is down, but the availability rate is up.*

The average retail rent in the Kalamazoo market is $10.94 per sf (NNN), which is slightly lower than the five-year average but may improve as new construction becomes occupied. The vacancy rate is down to 14.0 percent from a five-year average of 15.3 percent, however the availability rate is up nearly six percentage points (26.3) from the average of 20.8 percent. This may be due in part to the tripling of construction starts over the last 12 months and/or functional obsolescence of

existing space that has yet to be redeveloped or brought up to contemporary standards. Correlating this movement, the negative absorption trend shows that more tenants are leaving the market than signing new leases, although this figure is somewhat affected by the increase in new construction. The average months that a vacancy spends on the market is more than halved, showing that many of the remaining tenants are jockeying for modern space in desirable locations. Suggesting investors are envisioning improved returns, the annual sales volume has decreased and the average asking and sales prices have risen 57.5 and 44.5 percent respectively. The cap rate (8.5 percent) is above the national average, meaning returns as well as risk, can be greater than other markets.
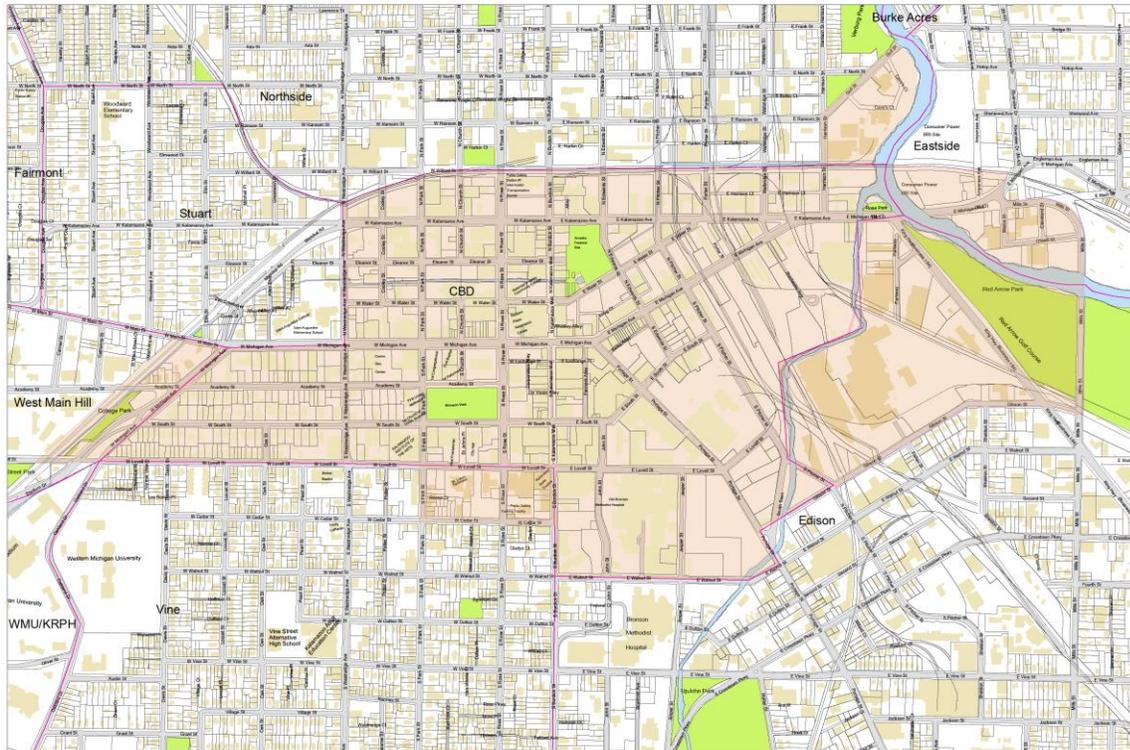
LEGEND

▮ PARKS   ▮ BUILDINGS   ▮ WATER FEATURES

Figure 9: *Central Business District Boundary Map.*

Location
The study area is located in the southwest corner of the state of Michigan approximately 40 miles from both the state's southern border and its eastern border on Lake Michigan. It is 45 miles south of Grand Rapids, 60 miles southwest of Lansing and 20 miles west of Battle Creek. Downtown Kalamazoo is centered on Michigan Avenue and bound by Willard Street, Mills Street, Walnut Street and Westnedge Avenue.

Access
The most direct access to the subject area is W. Kalamazoo Avenue/M43 from the east, W. Main Street/M43 from the west, N. Westnedge Avenue from the north, and S. Park Street from the south. Regionally, access to the study area is excellent, via I-94 for east-west visitors, and north-south via US-131.

Regional access south of the study area is provided at key exits from I-94: via the E. Michigan Avenue exit 10 miles east; via the branch road Amvet Memorial Parkway exit four miles southeast which turns into Kings Highway/I-96; the S. Westnedge Avenue exit almost four miles to the south; and exits at both Oakland Avenue and branch US-131 into the southwest area. Access from the west is via US-131, approximately four miles west of the study area at the W. Main Street exit, and five miles northwest of the study area via a branch US-131 that turns into N. Park Street and N. Westnedge Avenue. Access from the northeast is via Gull Road/SR 43, which meets M89 in Richland, almost nine miles away.

Table 8: Traffic Counts

Location	Traffic Count, AADT
I-94 at S. Westnedge Avenue	77,800
US-131 at Stadium Drive	47,900
M43/W. Main Street at Douglas Avenue	26,100
E. Kalamazoo Avenue at Westnedge Avenue	22,800
Gull Road/S. Riverview Drive at Michigan Avenue	17,700
E. Michigan Avenue at Park Street	17,400
S. Westnedge Avenue at Vine Street	13,200
S. Park Street at Vine Street	13,100
Kings Highway at E. Michigan Avenue	11,100
N. Park Street at W. Kalamazoo Avenue	8,700
N. Westnedge Avenue at Kalamazoo Avenue	8,200

Table 8: *The traffic chart shows the heaviest traffic into the study area is M43/W. Main Street at Douglas Street, at 26,100 ADT, from the west, and E. Kalamazoo Avenue from US-131 to E. Michigan Avenue.*

Traffic

High traffic volumes seen in Table 8 depict the routes with the best regional access (I-94 at S. Westnedge Avenue and US-131 at Stadium Drive), and the highest concentration of activity, as well as best local access points. The traffic counts in the area are provided by MDOT, and measured in terms of Average Daily Traffic Volume.

In the downtown study area, the one-way westbound Kalamazoo Avenue demonstrates the highest traffic levels, 22,800 cars per day, while the eastbound Michigan Avenue averages 17,400 cars per day. The north-south couplet of Westnedge Avenue and Park Street show similar traffic levels: just above 13,000 cars per day south of downtown and over 8,000 cars per day north of downtown.

Downtown Kalamazoo is served by Metro Transit with 15 different routes connecting area residents to downtown. Annual ridership has steadily grown to more than three million – route frequencies range from 30 to 60 minutes depending on the time of day and the one-way fare is $1.50. The majority of downtown serving routes connect to the Kalamazoo Transportation Center at the intersection of Burdick Street and Kalamazoo Avenue. The transit center is also a stop for Greyhound bus and Amtrak rail service. The Wolverine and Blue Water Amtrak routes connect Kalamazoo to Detroit, Port Huron and Chicago.

Figure 10: *Students from (l-r) Western Michigan University, Kalamazoo College, Kalamazoo Valley Community College and Davenport University contribute almost 45,000 students and faculty to Kalamazoo's population.*

Student Population

Students are an important gear in the economic engine for Downtown. Western Michigan University, Kalamazoo College, Kalamazoo Valley Community College and Davenport University, with over 40,000 students and 4,000 faculty and staff, make Kalamazoo a major center for advanced education.

1. **Western Michigan University**
   With an enrollment of 26,600 students, (18,600 undergraduates and 8,000 graduate students) Western is a significant source of consumers for the downtown study area. Founded in 1903, this public research university is divided into five campuses in and around Kalamazoo; West Campus is the "Main Campus," the primary and largest WMU campus in Kalamazoo, located 1.5 miles west of the study area. Western offers schools of Law and Medicine and the College of Aviation, one of the largest and most prestigious Flight Science programs in the United States. The university's more than 140 undergraduate programs are enhanced by master's degree programs including Business, Engineering and Education and Human development, as well as highly ranked programs training speech-language pathologists, physician assistants, rehabilitation counselors and audiologists.

2. **Kalamazoo College**
   Kalamazoo College is a private liberal arts college, founded in 1833. Notable as among the 100 oldest colleges and universities in the United States, it offers its 1,400 undergrads some 28 majors, as well as 11 interdisciplinary majors. It is consistently considered one of the best liberal arts colleges in the country for experiential learning, study abroad and academics. The importance of experiential education is

entrenched in its academic plan, known as the "K plan," which consists of a rigorous liberal arts education supplemented by experience abroad and in the Kalamazoo community.

3. **Davenport University**

   Davenport University is a private, non-profit university with campuses throughout Michigan and online. It was founded in 1866 and offers Associate's, Bachelor's, and Master's Degrees, diplomas, and post-grad certification programs in business, technology, health professions, and graduate studies (MBA). It has a partnership with Kalamazoo Valley Community College at the KVCC's downtown campus whereby KVCC graduates can seamlessly transition into a bachelor's degree program with onsite programs offered on the KVCC campus.

4. **Kalamazoo Valley Community College**

   Administrative Offices for Kalamazoo Valley Community College are located downtown at 202 N. Rose Street, serving as the northern terminus of the North Kalamazoo pedestrian Mall. This location is the Arcadia Commons Campus, which serves as a hub for a community, business and education partnership that renovated and revitalized a significant portion of the historic downtown area. KVCC is a comprehensive, public, two-year college with four campuses: Texas Township, Arcadia Commons, Groves Campus and the Bronson Healthy Living Campus. The downtown Arcadia campus enrolls 3,000 students a year.

Kalamazoo is also the beneficiary of the Kalamazoo Promise, an anonymously funded endowment, in perpetuity, which awards Kalamazoo Public School graduates with up to 100% tuition for continuing their post-secondary education.

Special Events

Figure 10: Downtown Kalamazoo hosts a number of weekly, monthly and annual events.

The study area is a frequent platform for civic events, a popular feature of the pedestrian mall days, which draw visitors from throughout the community and the region. Perhaps the most well-known event is the monthly Art Hop that pairs artists with downtown businesses in an open house format. Beginning in 1995, there have been 235 Art Hops at 5,400 stops featuring over 7,400 artists. Over 75,000 participants are annually drawn to the event with an estimated economic impact of $2.46 million. In addition to Art Hop, Lunchtime Live! is a popular summer event that features food trucks and music in Bronson Park, drawing many of the office workers out into the downtown.

It should be noted that events can be a detriment to retailers when they occur during productive shopping periods. While they often bring folks downtown that otherwise may not, the lack of parking, traffic and over-crowding are often enough to keep away regular patrons. Events should be planned with retailer representation and the negative effects mitigated as feasible.

Other Shopping Areas

As part of GPG's field evaluation, neighborhood, community and regional shopping centers near the study area were visited to assess their retail appeal, strength of tenant mix, general maintenance and accessibility. In addition to the onsite inspection of the most significant competing shopping concentrations to the study area, GPG used information from the International Council of Shopping Centers' Global Shopping Center Directory.

Regional Centers

Figure 12: *Crossroads Mall is the only regional center within a 45-mile radius of the study area.*

1. **The Crossroads** is the only enclosed regional center within a 45-mile radius of the study area. The 769,200-sf center is situated five miles south of the study area, at S. Westnedge Avenue in Portage, north of a Best Buy. Its 97 retailers are augmented by a 20,000-sf food court, a 36-foot double-decker carousel, and the adjacent Celebration! Cinema & IMAX. Renovated in 2001, its anchors are JC Penney, Macy's and Sear's. Notable retailers include ALDO, Bath & Body Works, Best Buy Mobile, Build-A-Bear Workshop, Burlington, Charming Charlie, Forever 21, Kay Jewelers, Pandora, Victoria's Secret and Zumiez. GGP is the property owner.

Community Centers

2. **University Commons** is a 200,000 SF community center located off US-131 at Stadium Drive, nearly two miles southwest of the study area. University Commons services commuters as well as the college students from nearby Kalamazoo College, Western Michigan University, the Western Michigan University Business Technology & Research Park, and Western Michigan University Engineering College. Grocery-anchored by Save a Lot, other retailers are At Home, Craft Draft 2 Go, Harbor Freight & Tools, Planet Fitness, Barrett's Smokehouse, Jimmy John's, Arby's, Qdoba and Uccello's.

Figure 13: *University Commons (left) and Maple Hill Pavilion.*

3. **Maple Hill Pavilion** originally opened as Maple Hill Mall in 1971, but after years of decline was mostly demolished and rebuilt by Kimco in 2004. Now owned by Devonshire REIT, it is located at 5050 W. Main Street, nearly 3.5 miles west of the study area. More than 20 stores are anchored by Hobby Lobby, Lowe's, Marshall's, OfficeMax and PetSmart. Target shadow-anchors the center to the west. Other retailers in the 284,300-sf community center include America's Best, Dollar Tree, DSW, Five Below, GNC, Maurices, Pier 1 Imports, Rooms Today and Rue21. An outparcel holds Old Country Buffet.

4. **West Main Shopping Center** is a 363,000-sf community center that enjoys easy access to US-131 from its location at the southwest corner of West Main and Drake, just across the street from Maple Hill Pavilion. The center's anchor tenants include Harding's Food Market, Kohl's, Lowe's and MC Sports. Ancillary tenants include Blaze Pizza, Family Dollar, Fashion Connection Menswear, Payless ShoeSource, Niskers Grill, Style M.E. Boutique, Hunan Gardens, the UPS Store and Verizon.

Figure 14: *Kohl's is among the four anchors of West Main Shopping Center (left). Corner @ Drake (right) Is expanding its footprint to attract inline retailers to supplement a Costco and Field and Stream.*

5. **Corner @***Drake* is a $70 million shopping plaza on *40 acres, l*ocated at the northeast quadrant of US-131 and Stadium Drive, 3.5 miles slightly southwest of the study area. *Already home to a 148,000 sf Costco (opened in 2014) and a 50,000 sf Field & Stream (opened in 2016), a new retail section called The Corner Shoppes currently features a Firehouse Subs shop bookended by a credit union and a bank.* Two new buildings fronting Drake Road are currently under construction, and offer up to 20,000 sf of prime retail or restaurant space *by* developer AVB Inc.

Figure 15: Southland Mall (left) and Portage Crossings (right) add to the draw of the Crossroads Mall area.

6. **Southland Mall,** five miles south of the downtown study area, is a 365,000-sf community center situated at S. Westnedge Avenue and W. Milham Avenue in Portage, midway between the I-94 interchange and Crossroads regional mall. Anchors include Barnes & Noble, Kohl's, Old Navy, T.J. Maxx and Ulta. They are buttressed by ABC Warehouse, David's Bridal, Hallmark, Helzberg Jewelers, Lane Bryant, MC Sporting Goods, Maurices, Petco and Tuesday Morning. Customers can swing by Noodles and Company, Panchero's, Pizza Hut and Taco Bell for a meal break. The Meyer C. Weiner Company owns and operates Southland.

   Across S. Westnedge Avenue from Southland is a retail assembly that includes Aldi, Chuck E. Cheeses, Dick's Sporting Goods, Jo-Ann Fabrics & Crafts and Toys R Us.

7. **Portage Crossings** is a 290,000-sf community center across S. Westnedge Avenue from Crossroads Mall, at J.L. Hudson Drive and S. Westnedge in Portage. It was built in 1988 and last renovated in 1992. Its 20 stores are anchored by Target and Home Depot, and include Bargain Books, Catherine's, Edible Arrangements, GameStop, Great Party, Life Uniforms and Sakura Japanese Steakhouse and Zoup!, as well as several beauty and service-oriented tenants.

Figure 16: Tiffany's Village (left) is the closest retail competition to Downtown. Westwood Plaza (right) is situated in the same vicinity as Maple Hill Pavilion and West Main Center.

Neighborhood Centers

8. **Tiffany's Village** is a 30,000-sf neighborhood center in Kalamazoo Twp., located less than 1.5 miles from the study area at 1714 W Main Street. Tiffany's Wine and Spirits anchors the center, which also includes QD Pharmacy, Klai Beauty Supply, Nina's Café, Papa John's Pizza and Zooroona Restaurant. The center is owned by the Mandwee Family.

9. **Westwood Plaza** is a 100,000-sf neighborhood center approximately 3.2 miles west of the study area at 4604 W. Main Street, on the northeast corner of West Main & Drake. Its retailers and eateries include Biggby Coffee, Cold Stone Creamery, Discovery Shop, Kyoto Japanese Steakhouse, Lumber Liquidators, MacKenzie's Café & Bakery, Main Street Pub, Merle Norman Cosmetic Studio National Health Food Center, Taste of Heaven, Penn Station Subs, Sleep Doctor Mattresses, Phantom Fireworks and Wild Bill's Tobacco. The center is owned by Treystar.

10. **Willow Creek Shopping Center** is a 47,600-sf neighborhood center offering a selection of restaurants, retailers and medical service providers at 5132 S. Westnedge Avenue in Portage. Situated near I-94, its retailers include Batteries Plus, Dollar Tree, Medical Weight Loss, Payless ShoeSource, Vladimir Arts and Wild Bill's Tobacco. The retail is supported by quick service eateries Biggby Coffee, Jersey Giant Subs and Papa John's Pizza. Located nearly 3.5 miles south of the study area, the leasing manager is Hinman Development.

    Over one million square feet of critical retail mass adjacencies surround Willow Creek. The center is directly in front of Lowe's, adjacent to Earth Fare and Pet Supplies Plus, and across the street from Meijer. North of Willow Creek is a community center with Bert's Bakery, Big Lots, Family Christian, Hibachi Sushi Buffet and anchor Office Depot.

Figure 17: Willow Creek Shopping Center (left) is adjacent to significant large-scale retail stores. Oakwood Plaza (right) is anchored by a recently expanded Sawall Health Foods.

10. **Oakwood Plaza,** located about 4.7 miles south of downtown at 700 Mall Drive in Portage, is a 52,000-sf neighborhood specialty center. Situated 1.5 miles of Western Michigan University, it benefits from some college trade. It is grocery-anchored by recently renovated 24,000-sf Sawall Health Foods, which is the most successful and well known independent health food store in the area. When the center renovated the exterior renovation, and added parking in 2015, Sawall also expanded its size by 8,000 sf. It added an upper level to include space for more pre-cooked foods as well as an outdoor sitting area. Owned & operated since 1989 by the Matthew C. Weiner Co., its 17 tenants include Barks 5th Avenue, Bookbug, Fletcher's Pub, Initial Attraction, Treat Street ice cream and Wild Birds Unlimited.

Figure 18: *Greenspire Shoppes (left) and Woodbridge Village (right) are near each other on W. Centre Avenue.*

11. **Greenspire Shoppes** is located near Woodbridge Shopping Village, at 3279 W. Centre Avenue in Portage. Hinman and AVB have developed this 13,400-sf upscale neighborhood retail center that offers Biggby Coffee, Breakfast at Tiffiny's, Centre Street Tap House, Kazoo Audio and Sticks & Stones, as well as additional service-oriented tenants. It is approximately 6.8 miles southwest of the study area.

12. **Woodbridge Shopping Village** is a 65,000-sf neighborhood center located one-half mile east of US-131 at 3750 W. Centre Avenue in Portage. Retail and restaurant tenants include Big Apple Bagels, Cookies by Design, Design Details, Fieldstone Grill, Harding's Market, Little Caesars, Spicy Pickle, Subway, The Big Burrito, UniQ Jewelry Gallery and Ziingo. They are joined by a variety of service-oriented tenants. The center is managed by Treystar Leasing.

North of Kalamazoo is a retail conglomeration on Allegan Street/M89 just west of the exit from US-131 in Plainville, approximately 11.5 miles north of the study area. It includes:

Figure 19: *Otsego Plaza (left) and Oaks Crossing Mall (right) are farther north of the site in Plainwell.*

13. **Otsego Plaza** is a 33,000 GLA neighborhood center located at 1221 M-89 in Plainwell. Constructed in 1992, and shadow-anchored by Home Depot, it offers Dollar Tree, Payless Shoe Source and Tractor Supply Company. A Meijer is just east of this plaza. It is represented by Simon Jonna & Group of Marcus & Millichap.

14. **Oaks Crossing Mall** is a neighborhood center located at 406 Cross Oaks Blvd., southwest of Otsego Plaza across M89/Allegan Street, between a Walmart and M-89 Cinema. Built in 1988, its selection of tenants includes Cricket Wireless, Empire Wok, Family Fitness Center, GameStop, Goin' Postal, Jo's Hallmark, NDS Electronics, Mancino's Italian Eatery and Sleep Solutions.
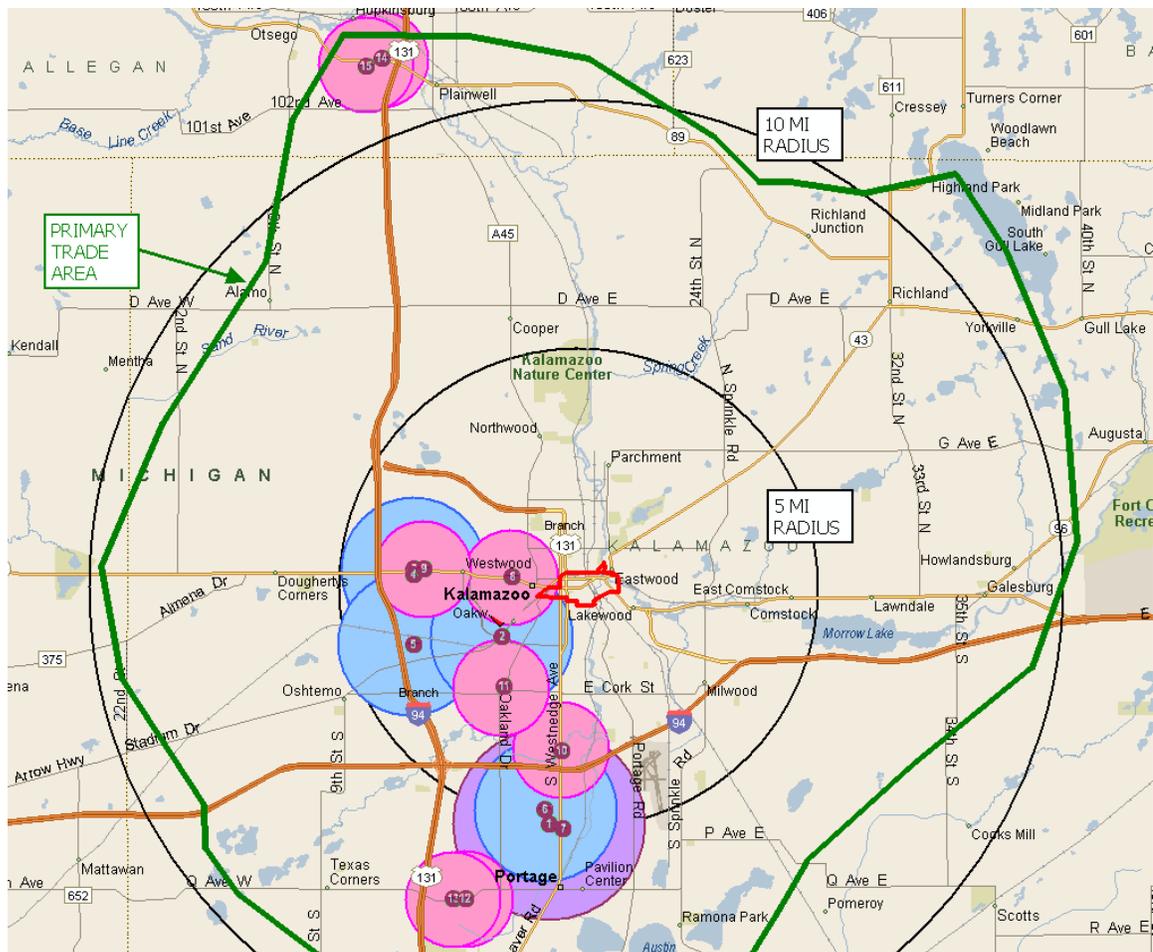
Figure 20: *Location map showing location of the significant retail competition to the subject area.*

Table 9: Shopping Center Competition

Map Designation	Retail Center Name	S/F	Distance from Site	Shopping Center Type
1	Crossroads Mall	769,200 sf	5.0 MI S	Regional Center
2	University Commons	200,000 sf	1.9 MI SW	Community Center
3	Maple Hill Pavilion	284,300 sf	3.5 MI W	Community Center
4	West Main Shopping Center	363,000 sf	3.5 MI W	Community Center
5	Corner @ Drake	220,000 sf	3.6 MI SW	Community Center
6	Southland Mall	365,000 sf	5.0 MI S	Community Center
7	Portage Crossings	290,000 sf	5.1 MI S	Community Center
8	Tiffany's Village	30,000 sf	1.4 MI NW	Neighborhood Center
9	Westwood Plaza	100,000 sf	3.2 MI W	Neighborhood Center
10	Willow Creek Shopping Center	47,600 sf	3.3 MI S	Neighborhood Center
11	Oakwood Plaza	52,000 sf	4.7 MI S	Neighborhood Center
12	Greenspire Shops	13,400 sf	6.8 MI S	Neighborhood Center
13	Woodbridge Village	65,000 sf	7.0 MI S	Neighborhood Center
14	Otsego Plaza	33,000 sf	11.5 MI N	Neighborhood Center
15	Oaks Crossing Mall	27,400 sf	11.5 MI N	Neighborhood Center

Figure 21: *Downtown can boast some recent new development, as seen on the left. However, Michigan Avenue has certain characteristics, such as the one-way street shown right, that impede the success of these enhancements.*

SUMMARY of FINDINGS

This study finds that the Downtown Kalamazoo study area can presently support up to 27,800 square feet (sf) of new retail and restaurant development, generating nearly $5.3 million in sales. Alternatively, with recommended physical and policy changes to the downtown's operations, the study area could support up to 156,500 sf of new retail and restaurant, producing up to $51.6 million in gross sales. This retail development could include:

- **Corner Stores**: One to two corner stores at 1,500 to 2,500 sf, located near neighborhood entries.

- **Convenience Centers**: Two to three 20,000 to 30,000 sf convenience centers with excellent visibility and sufficient parking. These centers can include a wide range of retailers such as pharmacy, gifts stores, electronics, full-service and limited-service restaurants, special food services, florists and apparel.

- **Main Street Centers**: One 100,000 to 150,000 sf Main Street center located with direct access from Kalamazoo Avenue or Michigan Avenue. The Main Street center would ideally secure an anchor tenant and feature a strong collection of lifestyle tenants such as apparel, shoes, jewelry, home furnishings, department store merchandise and gifts, as well as a critical mass of dining and entertainment options.

These centers could be developed as single-site stand-alone developments or as infill development into the existing downtown.

The demographics of the primary trade area show a population base of 237,300 people, which will grow to 244,900 by 2022, at an annual growth rate of 0.63 percent. The persons-per-household is 2.39, and median age is 34.3 years old. The average household income of $64,400 and the median household income of $45,500 in the primary trade area are similar to the total trade area incomes of $62,100 and $45,800, respectively. Primary trade area households report 29.4 percent of incomes greater than $75,000 per year, as compared to a 28.3 percent of residents in the total trade area.

There are approximately 158,600 employees within the primary trade, 39.5 percent of which are concentrated in the *Service* sector and 20.2 percent in *Retail Trade*. These daytime consumers

expend up to $830.3 million annually, with the *General Merchandise, Apparel, Home & Electronics* sector leading at over $322.9 million per year.

Tapestry lifestyles in the market reflect a majority base of *Traditional Living,* representing 12.8 percent of the primary trade area households. Residents of these neighborhoods earn a median household income of $37,000, with a median age of 34.8 years These consumers live in low-density, settled neighborhoods in urban clusters of metro areas in the Midwest, and married couples are the dominant household type, followed by single-parent and single-person households.

Many families encompass two generations who have lived and worked in the community. The manufacturing, retail trade, and health care sectors are the primary sources of employment for these residents. This is a younger market—beginning householders who are juggling the responsibilities of living on their own or a new marriage, while retaining their youthful interests in style and fun. More than 70 percent have completed high school or some college.

More than 75 percent of households derive income from wages and salaries, augmented by Supplemental Security Income and public assistance. They are cost-conscious, brand-loyal consumers, unless the price is too high. Households have one or two vehicles. While unemployment is higher at 10.9 percent, labor force participation is also higher at 64.6 percent. Over three quarters of this segment's households derive income from wages and salaries. They are connected to the Internet, while TV is the most trusted media. They shop at discount stores such as Walmart and Kmart, while frequenting convenience stores for fueling and lottery ticket purchases.

Fuel and incidentals like lottery tickets are often purchased at convenience stores. This segment is likely to carry credit card balances, have student loans and pay their bills in person. Favorite TV channels include QVC, CMT, and Game Show Network. They enjoy outdoor activities and fast food.

Green Acres is an older market segment, primarily married couples with an average age of 43.0, and their average household size of 2.69 reflects that most households have no children. They live in self-reliant rural enclaves of metropolitan areas, most often in single-family, older homes with acreage and a median value of $197,000. Their median household income is $72,000. Unemployment is low at six percent, and labor force participation is high at 67.4 percent. More than 15 percent of households are self-employed.

These consumers are focused on quality and durability, and comfortable with debt such as home and auto loans. They are do-it-yourselfers, maintaining and remodeling their homes, and enjoy gardening, outdoor sports and golf. These households prefer late model vehicles, from trucks and SUVs to motorcycles. They are active in their communities and social organizations.

Supportable 2017 Retail and Potential Tenants

- **26,500 sf Apparel**: Apricot Lane, Country Casuals / Expressions / J. Philips, Del Sol, Dennis Uniform, Educational Outfitters, Group USA, J. McLaughlin, Jos. A Banks, Roots and Tom James.

- **17,900 sf Miscellaneous Retail:** Miscellaneous retail includes cosmetics, eyewear and special interest retailers. Potential retailers include Blo Blow Dry Bar, Dick Blick, GNC, Orvis, Painting with a Twist and President Tuxedo.

- **14,400 sf Department Store Merchandise:** Visionworks, SEE Eyewear and Sola Salon.

- **13,400 sf Full-Service Restaurants:** Andiamo, Peppino's Sports Grille, Real Seafood Company, Red Mesa Grill, Red Olive, The Melting Pot and Tucano's Brazilian Grill.

- **12,300 sf Specialty Food Stores:** Achatz Handmade Pie Company, Bryn + Dane's, Edible, Ric's Food Center, Spice & Tea Merchants and Street Corner.

- **11,600 sf Limited-Service Eating Places:** 1000 Degrees Pizza, Big Smoke Burger, Cor Life, Naf Naf Grill, Olga's and Sweet Lorraine's Mac n Cheez.

- **10,400 sf Electronics & Appliances**: iStore, Simply mac, T-Mobile and uBreakiFix.

- **9,900 sf Pharmacy & Personal Care Stores**: Benzer Pharmacy, Ehardt's Pharmacy, La Vida Massage, Massage Envy and Massage Green.

- **9,400 sf Gift Stores**: Cherry Republic, Country Clutter Gifts, Crown Trophy, Kirlin's Hallmark, Swan Creek Candle Company and Ten Thousand Villages.

- **9,100 sf Drinking Establishments:** Griffin Claw, Bar Louie, Claddagh Irish Pub, Gordon Biersch Brewing Company, Bier Markt, Sedona Taphouse and Rusty Bucket.

- **6,700 sf Special Food Services:** Ben's Pretzels, Big Apple Bagel, Biggby Coffee, Breadsmith, Gigi's Cupcakes, Great Lakes Chocolate & Coffee, Kilwin's, Sanders, South Bend Chocolate Co. and Zoyo Neighborhood Yogurt.

- **4,300 sf Books & Music Stores:** Argos Book Shop, Book World and Books and Mortar.

- **3,300 sf Home Furnishings:** California Closets, Klingman's, La-Z-Boy, the Great Frame Up, US Mattress.

- **2,700 Beverage Stores:** Michigan by the Bottle, Tinder Box and Winestyles.

- **2,300 sf Jewelry:** Alex & Ani, Medawar, Pandora and The Jewelry Source.

- **1,400 sf Shoes:** Potential shoe stores are Good Feet, Foot Solutions, red Wing Shoes and V&A Shoes.

- **1,200 Florists:** 1 (800) Flowers and VanderSalm.

A detailed examination of the supportable sf of retail uses is found in the following Table 10.

Table 10: 2017 Supportable Retail Table

Retail Category	Status Quo Supportable SF	Sales/ SF	Status Quo Estimated Retail Sales	Supportable SF with Improvements	Sales/ SF	2022 Estimated Retail Sales	No. of Stores
Retailers							
Apparel Stores	1,780	$205	$364,900	26,460	$340	$8,996,400	8 - 10
Beer, Wine & Liquor Stores	-	$230	$0	2,650	$385	$1,020,250	1
Book & Music Stores	1,130	$170	$192,100	4,270	$280	$1,195,600	1
Department Store Merchandise	2,420	$230	$556,600	14,360	$380	$5,456,800	3 - 4
Electronics & Appliance Stores	-	$205	$0	10,430	$340	$3,546,200	3 - 4
Florists	-	$145	$0	1,140	$245	$279,300	1
Gift Stores	2,130	$160	$340,800	9,400	$270	$2,538,000	5 - 6
Home Furnishings Stores	1,810	$195	$352,950	3,280	$325	$1,066,000	1 - 2
Jewelry Stores	1,650	$265	$437,250	2,290	$445	$1,019,050	1
Miscellaneous Store Retailers	3,980	$160	$636,800	17,880	$265	$4,738,200	6 - 8
Pharmacy & Personal Care Stores	-	$290	$0	9,910	$485	$4,806,350	1 - 2
Shoe Stores	-	$170	$0	1,420	$285	$404,700	1
Specialty Food Stores	4,090	$175	$715,750	12,260	$295	$3,616,700	1 - 3
Retailer Totals	**18,990**	**$200**	**$3,597,150**	**115,750**	**$334**	**$38,683,550**	**33 - 44**
Restaurants							
Bars, Breweries & Pubs	2,470	$200	$494,000	9,060	$335	$3,035,100	2 - 3
Full-Service Restaurants	3,780	$210	$793,800	13,390	$350	$4,686,500	3 - 4
Limited-Service Eating Places	-	$170	$0	11,570	$280	$3,239,600	4 - 5
Special Food Services	2,520	$180	$453,600	6,690	$295	$1,973,550	3 - 4
Restaurant Totals	**8,770**	**$190**	**$1,741,400**	**40,710**	**$315**	**$12,934,750**	**12 - 16**
Retailer & Restaurant Totals	**27,760**	**$198**	**$5,338,550**	**156,460**	**$329**	**$51,618,300**	**45 - 60**

Table 10: *Sales stated in constant 2017 dollars.*

A breakdown of suggested category retailers and supportable square feet for each may be found in the following Table 11. Although the trade area will not support a grocery store downtown, GPG recommends that the city consider a small to medium-size, year-round public market, such as those in Bay City, Flint, Grand Rapids and the Oxbow Market in Napa.

City Market, Bay City, Michigan
Bay City will open a new year-round, indoor farmers market at 401 Center Avenue in June 2017. The market is located in a former downtown JC Penney building and will be fully occupied with approximately 30 vendors selling fresh, locally sourced food. They range from farmers offering fresh produce to a fishmonger selling fresh catches from Lake Huron, as well as: Bee Leaf Teas, Artisanne Chocolatiers, Brewtopia coffee shop, Burdock Root farm-to-table restaurant, Chubby Duck Asian restaurant and grocery, Cinnamom bakery, Elaine's bake shop, GCC Organics USDA- certified butchery, Half-Mile Handmade kitchen products (Michigan-made), Oily Apothecary essential oils booth, The Devout Sprout salad bar and The Petal Boutique flowers, among others. The market has 10 vendors on a waiting list to join the new enterprise.

Figure 22: *Workers put the finishing touches on the new City Market in Bay City, set to open in June (left). The Flint Farmer's Market (right) relocated to downtown in the former Flint Journal building.*

Flint Farmers' Market

The 70+ year-old Flint Farmers' Market moved to a new downtown location in May 2014. The market features more than 50 vendors offering produce, meat and poultry, groceries, spices, beverages, flowers, gifts, baked goods and eating places in an indoor-outdoor venue. Open three days a week (Tuesday, Thursday and Saturday) year-round, the 32,000-sf market also sponsors events such as live music, storytellers, authors, and demonstrations focusing on foods that can help limit the effects of lead poisoning (the market emphasizes that their water filter system is lead-free). Voted #3 in the nation, the market's selection of vendors includes: Willow's Garden Juice Bar, Hoffman's Chop Shop butcher shop, Charlie's Smokin' BBQ, d'Vine Wines, Maria's Garden, Bagels & Beans, Beirut Restaurant, Crust, a baking company, Fresh Donuts by Porter's, Fresh Lake Whitefish Company, Godfrey's Poultry & Eggs, Gourmet Apple Cart, Hills Home Cured Cheese, J Deans Smoke House, Market Deli by Hoffman's, Market Tap full service bar, in addition to an assortment of farms offering seasonal Michigan homegrown fruits and vegetables.

The market's Dort Federal Credit Union Demonstration Kitchen hosts weekly cooking classes and demos. The indoor-outdoor market also features an art gallery, a café and several spaces to host private events, including the Atrium, or indoor Town Square, which has a 70-foot-high ceiling; the Rooftop Terrace overlooking downtown Flint; and the Ramsdell Room that seats 200.

Grand Rapids Downtown Market

The Grand Rapids Downtown Market, located at 435 Ionia Ave. SW, is home to 22 indoor market vendors, two full-service restaurants, monthly outdoor market events, hands-on cooking classes, private event venues, a state-of-the-art incubator kitchen, rooftop greenhouses and more. Opened on May 3, 2013 indoor facility, the $30 million market is LEED Gold certified (the first in the country). Grand Rapids Downtown Market, Inc. operates the Market.

The 138,000-sf space offers an array of vendors including Crane Dance Farm, Trillium Haven Farm, Slows Bar B Q, Social Kitchen & Bar, Aperitivo, Blue Spoon Pasta Studio, bokay Flower Market, Carver's Grand Rapids Finest Meats, Dorothy & Tom's Gourmet Popcorn, Field & Fire Bakery, Fish Lads, Love's Ice Cream, Madcap Coffee, Making Thyme Kitchen, Michigan Pantry, Rocket Pies and Spice Merchants.

Figure 23: *The Grand Rapids Public Market (left) is the first LEED-certified public market in the country. The Oxbow Pubic Market in Napa, California (right) opened in 2007.*

Oxbow Public Market

The Oxbow Public Market is a 40,000-sf indoor marketplace in Napa, California that features local and regional artisan food and wine vendors and restaurants. The market leases space to owner-operated businesses that focus primarily on sustainable local foods. Opened in 2007, its indoor vendors all share a roof, an airy, open space, and the twice-weekly farmers' market in the parking lot outside, while also featuring an outdoor deck overlooking the Napa River. The 22 merchants offer a tenant mix of local food vendors, artisan cafes and an organic produce outlet for local farms, including, C Casa, Fatted Calf Charcuterie, Five Dot Ranch & Cookhouse, Hog Island Oyster Co., Hudson Greens & Goods, Model Bakery, Napa Bookmine, Napa Valley Distillery, Oxbow Cheese and Wine Merchant, Ritual Coffee, Three Twins Ice Cream and Whole Spice. Managed by Madison Oxbow Ventures LP, the market is open seven days a week.

Table 11: Recommended Retailers

Apparel			Supportable SF=	26,460
			Number of Stores	8 to 10
Prospect				SF
Country Casuals / Expressions / J. Phillips				2,500
Apricot Lane				2,500
Del Sol				2,000
Dennis Uniform				3,000
Educational Outfitters				4,000
Group USA				5,000
J. McLaughlin				2,300
Jos. A Banks				4,500
Roots				3,000
Tom James				3,000
				31,800

Beer, Wine & Liquor			Supportable SF=	2,650
			Number of Stores	1
Prospect				SF
Winestyles				2,000
Tinder Box				1,000
Michigan By The Bottle				2,000
				5,000

Book & Music Stores			Supportable SF=	4,270
			Number of Stores	1
Prospect				SF
Argos Book Shop				3,000
Book World				3,000
Books & Mortar				2,500
				8,500

Department Store Merchandise			Supportable SF=	14,360
			Number of Stores	3 to 4
Prospect				SF
Visionworks				3,000
SEE Eyewear				1,200
Sola Salon				5,000
				9,200

Electronics + Appliance Stores			Supportable SF=	10,430
			Number of Stores	3 to 4
Prospect				SF
iStore				3,000
Simply Mac				5,000
T-Mobile				3,000
uBreakiFix				1,500
				12,500

Table 11 continued on next page

Florist		Supportable SF=	1,140
		Number of Stores	1
Prospect			SF
1 (800) FLOWERS			2,000
VanderSalm			2,200
			4,200

Gift		Supportable SF=	9,400
		Number of Stores	5 to 6
Prospect			SF
Cherry Republic			5,000
Country Clutter Gifts			2,000
Crown Trophy			1,000
Kirlin's Hallmark			3,000
Swan Creek Candle Co			2,000
Ten Thousand Villages			2,500
			15,500

Home Furnishings		Supportable SF=	3,280
		Number of Stores	1 to 2
Prospect			SF
California Closets			1,000
Klingman's			5,000
La-Z-Boy			5,000
The Great Frame Up			1,500
US Mattress			3,000
			15,500

Jewelry		Supportable SF=	2,290
		Number of Stores	1
Prospect			SF
Alex & Ani			1,500
Medawar			2,500
Pandora			1,000
The Jewelry Source			2,000
			7,000

Miscellaneous Store Retailers		Supportable SF=	17,880
		Number of Stores	6 to 8
Prospect			SF
Blo Blow Dry Bar			1,200
Dick Blick			5,000
GNC			1,200
Orvis			12,000
Painting with a Twist			2,000
President Tuxedo			1,500
			22,900

Table 11 continued on next page

Table 11: Recommended Retailers (con't)

Pharmacy & Personal Care	Supportable SF=	9,910
	Number of Stores	1 to 2
Prospect		SF
Benzer Pharmacy		5,000
Ehardt's Pharmacy		4,000
La Vida Massage		2,000
Massage Envy		2,000
Massage Green		2,000
		15,000

Shoe Stores	Supportable SF=	1,420
	Number of Stores	1
Prospect		SF
V&A Shoes		3,000
Foot Solutions		1,500
Good Feet		3,000
Red Wing Shoes		2,200
		9,700

Specialty Food Services	Supportable SF=	12,260
	Number of Stores	1 to 3
Prospect		SF
Achatz Handmade Pie Co		3,500
Bryn + Dane's		3,500
Edible Arrangements		1,200
Ric's Food Center		7,000
Spice & Tea Merchants		1,500
Street Corner		1,000
		17,700

Restaurants:	Supportable SF=	9,060
Bars, Breweries & Pubs	Number of Stores	2 to 3
Prospect		SF
Griffin Claw		7,000
Bar Louie		5,000
Claddagh Irish Pub		8,000
Gordon Biersch Brewing Co.		8,000
Bier Markt		8,000
Sedona Taphouse		6,000
Rusty Bucket		6,000
		48,000

Restaurants:	Supportable SF=	13,390
Full-Service Restaurants	Number of Stores	3 to 4
Prospect		SF
Andiamo		6,000
Peppino's Sports Grille		6,000
Real Seafood Company		6,000
Red Mesa Grill		5,500
Red Olive		4,000
The Melting Pot		5,000
Tucano's Brazilian Grill		7,000
		39,500

Table 11 continued on next page

Restaurants: Limited-Service Eating Places	Supportable SF= Number of Stores	11,570 4 to 5
Prospect		SF
1000 Degree Pizza		3,000
Big Smoke Burger		3,000
CoreLife		3,500
Naf Naf Grill		3,000
Olga's Kitchen		4,000
Sweet Lorraine's Mac n Cheez		1,800
		18,300

Restaurants: Special Food Services	Supportable SF= Number of Stores	6,690 3 to 4
Prospect		SF
Ben's Pretzels		1,000
Big Apple Bagel		1,800
Biggby Coffee		1,500
Breadsmith		1,800
Gigi's Cupcakes		1,500
Great Lakes Chocolate & Coffee		1,800
Kilwin's		1,800
Sanders		1,500
South Bend Chocolate Co.		2,500
Zoyo Neighborhood Yogurt		1,500
		16,700

Table 11: *Names and sizes of possible retailers supportable in the study area.*

Retail Category Definitions

Retail categories in the Supportable Retail Table correspond to the North American Industry Classification System (NAICS), the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. The following NAICS codes and definitions are provided by the U.S. Census Bureau:

Retail

Auto Supply Stores (4411): establishments known as automotive supply stores primarily engaged in retailing new, used, and/or rebuilt automotive parts and accessories; automotive supply stores that are primarily engaged in both retailing automotive parts and accessories and repairing automobiles; establishments primarily engaged in retailing and installing automotive accessories; and establishments primarily engaged in retailing new and/or used tires and tubes or retailing new tires in combination with automotive repair services.

Furniture Stores (4421): establishments primarily engaged in retailing new furniture, such as household furniture (e.g., baby furniture box springs and mattresses) and outdoor furniture; office furniture (except those sold in combination with office supplies and equipment); and/or furniture sold in combination with major appliances, home electronics, home furnishings, and/or floor coverings.

Home Furnishings Stores (4422): establishments primarily engaged in retailing new home furnishings (except furniture).

Electronics and Appliance Stores (4431): establishments primarily engaged in retailing the following new products: household-type appliances (refrigerator, dishwasher, oven), cameras, computers/software, televisions, and other electronic goods.

Hardware Stores (4441): establishments primarily engaged in retailing new building materials and supplies (lumber, plumbing, electrical, tools, housewares, hardware, paint, and wallpaper)

Lawn and Garden Supply Stores (4442): establishments primarily engaged in retailing new lawn and garden equipment and supplies. (Nursery, farm, and garden products, outdoor power equipment)

Grocery Stores (4451): establishments primarily engaged in retailing a general line of food products (canned/frozen food, fruits and vegetables, meat, fish, poultry, milk, bread, eggs, soda)

Specialty Food Stores (4452): establishments primarily engaged in retailing specialized lines of food (meat, fish/seafood, fruits/vegetables, baked goods, candy, nuts, confections, popcorn, ice cream, items not made on the premises)

Beer, Wine, and Liquor Stores (4453): establishments primarily engaged in retailing packaged alcoholic beverages, such as ale, beer, wine, and liquor.

Health & Personal Care Stores (4461): establishments primarily engaged in retailing health and personal care products (pharmacies/drug stores, first aid, beauty products, household supplies, candy, prepackaged snacks, optical goods, vitamins/supplements).

Clothing stores (4481): men's and boys' clothing stores; women's and girls' clothing stores; children's and infants' clothing stores; family clothing stores; clothing accessories stores.

Shoe Stores (4482): Shoes (men's, women's, child/infant, athletic)

Jewelry Stores (4483): Jewelry, luggage, and leather goods (silverware, watches, clocks, handbags, briefcases, belts, gloves)

Sporting Goods Stores (4511): establishments primarily engaged in retailing new sporting goods (fitness equipment, bikes, camping, uniforms, foot-wear)

Book & Music Stores (4512): establishments primarily engaged in retailing new books, newspapers, magazines, and prerecorded audio and video media.

Department Stores (4521): establishments known as department stores primarily engaged in retailing a wide range of the following new products with no one merchandise line predominating: apparel; furniture; appliances and home furnishings; and selected additional items, such as paint, hardware, toiletries, cosmetics, photographic equipment,

jewelry, toys, and sporting goods. Merchandise lines are normally arranged in separate departments.

General Merchandise Stores (4529): establishments primarily engaged in retailing new goods in general merchandise stores (except department stores) (warehouse clubs, supercenters, apparel, auto parts, dry goods, hardware, groceries, housewares, no line predominating).

Florists (4531): establishments known as florists primarily engaged in retailing cut flowers, floral arrangements, and potted plants purchased from others. These establishments usually prepare the arrangements they sell.

Office Supplies & Gift Stores (4532): establishments primarily engaged in one or more of the following: (1) retailing new stationery, school supplies, and office supplies; (2) retailing a combination of new office equipment, furniture, and supplies; (3) retailing new office equipment, furniture, and supplies in combination with retailing new computers; and (4) retailing new gifts, novelty merchandise, souvenirs, greeting cards, seasonal and holiday decorations, and curios.

Miscellaneous Retailers (4539): establishments primarily engaged in retailing new miscellaneous specialty store merchandise (except motor vehicle and parts dealers; furniture and home furnishings stores; consumer-type electronics and appliance stores; building material and garden equipment and supplies dealers; food and beverage stores; health and personal care stores; gasoline stations; clothing and clothing accessories stores; sporting goods, hobby, book, and music stores; general merchandise stores; florists; office supplies, stationery, and gift stores; and used merchandise stores). Pet supplies, art dealers, manufactured home dealers, tobacco/cigar stores,

Restaurants
Full-Service Restaurants (7221): establishments primarily engaged in providing food services to patrons who order and are served while seated (i.e., waiter/waitress service) and pay after eating. Establishments that provide these types of food services to patrons with any combination of other services, such as carryout services are classified in this industry.

Limited-Service Restaurants (7222): establishments primarily engaged in providing food services where patrons generally order or select items and pay before eating. Most establishments do not have waiter/waitress service, but some provide limited service, such as cooking to order (i.e., per special request), bringing food to seated customers, or providing off-site delivery (cafeterias, snack/ juice bar, ice cream/soft serve shops, cookie shops, popcorn shops, donut shops, coffee shops, bagel shops)

Special Food Services (7223): establishments primarily engaged in providing:
(1) one of the following food services; (2) a location designated by the customer; or
(3) from motorized vehicles or nonmotorized carts.
  - Food Service Contractors: Establishments may be engaged in providing food
  services at institutional, governmental, commercial, or industrial locations of
  others based (cafeteria, restaurant, and fast food eating-place) on contractual

arrangements with these types of organizations for a specified period of time. The food services contractor always provides management staff.
- Caterers: providing single event-based food services. These establishments generally have equipment and vehicles to transport meals and snacks to events and/or prepare food at an off-premise site. Banquet halls with catering staff are included in this industry. Examples of events catered by establishments in this industry are graduation parties, wedding receptions, business or retirement luncheons, and trade shows.
- Mobile Food Services: establishments primarily engaged in preparing and serving meals and snacks for immediate consumption from motorized vehicles or non-motorized carts. The establishment is the central location from which the caterer route is serviced, not each vehicle, or cart. Included in this industry are establishments primarily engaged in providing food services from vehicles, such as a hot dog cart and ice cream truck.

Shopping Center Definitions
This study utilizes the shopping centers typologies defined by the International Council of Shopping Centers (ICSC) as follows:

- **Convenience Centers:** Convenience centers are 30,000 sf or less, unanchored, and generally will service a trade area of up to one mile. These centers include banking, carryout foods, florists, mail centers, small restaurants, small food markets, and professional services such as real estate and financial consulting. The centers typically include six to eight businesses.

- **Neighborhood Centers:** Neighborhood centers are anchored with a full-sized supermarket and typically range from 60,000 to 100,000 sf. They service a trade area of two to three miles and can include apparel, banks, carryout food, hardware, mail centers, restaurants, sporting goods, and professional services such as financial consulting and real estate.

- **Community Centers:** Community centers typically range from 150,000 to 300,000 sf and are almost always anchored with a full-sized department store. They also include junior anchor retailers selling books, crafts, shoes, and sporting goods. Community centers often include large home improvement stores and medium-sized discount apparel stores. Their service area is typically five to seven miles in suburban locations.

- **Lifestyle Centers:** Lifestyle centers average 150,000 to 200,000 sf and feature popular apparel, book, and home furnishing stores, as well as cinemas and a wide selection of themed restaurants. The centers are frequently planned as walkable areas with main streets. Recently, lifestyle centers have included large anchors such as department stores, public libraries, and supermarkets. These centers typically have a trade area of four to six miles when developed in suburban settings. Lifestyle centers that include civic, employment, and residential buildings along with the retail land use are defined as 'town centers.'

- **Regional Centers:** Regional centers average trade areas of eight to 12 miles and are anchored with multiple department stores. The centers can range from 800,000 to 1,500,000 sf, and often include cinemas along with 200,000 sf of national brand fashion.

Rationale

The rationale for the findings in this study follows:

- **Advantageous population and income growth:** Downtown Kalamazoo is located in a growing area represented by annual population growth of 0.63 percent and average household income growth of 2.9 percent. These base economic characteristics contrast many other regions of Michigan and create a favorable environment for new commercial development.

- **Major institutions and employment centers:** Downtown Kalamazoo is within two miles of a robust population of over 25,000 students. College-aged consumers crave urban living, shopping and entertainment and are a largely untapped market for downtown. Luring them to the study area with relevant retail and entertainment could greatly expand the sales capture of existing and future tenants. Similarly, major employers such as Bronson Hospital, Western Michigan University, Pfizer Corporation and the Stryker Corporation serve as economic drivers for the region and downtown. High-wage earning workers generate significant expenditure for retailers before, during and after the workday.

- **Underserved trade area:** The households in the primary trade area are currently underserved by existing retailers represented by the $51.6 million in sales that could be captured by Downtown Kalamazoo. National trends demonstrate a resurgence in the demand for urban, mixed-use and walkable communities to live and shop. With continuing residential development in the study area, the opportunity to expand the depth and variety of the shopping district will be strong.

- **Tourism and Events:** As the urban hub of southwestern Michigan, residents throughout the region view Downtown Kalamazoo as a frequent destination for shopping, dining and entertainment venues not otherwise offered in smaller towns and villages. Additionally, exceptionally well-known craft breweries serve as anchors for the community and draw enthusiasts from throughout the Midwest. Lastly, popular events hosted in the downtown extend the variety of reasons area that shoppers find for heading downtown. These conditions combine to represent a robust and varied consumer base familiar with Kalamazoo and could be enticed to more frequently visits or lengthen existing visits to downtown and increase the overall commercial expenditure.

Limits of Study

The findings of this study represent GPG's best estimates for the amounts and types of retail projects that should be supportable in the study area. Every reasonable effort has been made to ensure that the data contained in this study reflect the most accurate and timely information possible and are believed to be reliable. This study is based on estimates, assumptions, and other information developed by GPG independent research effort, general knowledge of the industry, and consultations with the client and its representatives. This study is designed as objective third party research and GPG does not recommend that any or all of the supportable retail be developed in the study area.

No responsibility is assumed for inaccuracies in reporting by the client, its agent and representatives or in any other data source used in preparing or presenting this study. This report is based on information that was current as of May 25, 2017, and GPG has not undertaken any update of its research effort since such date.

This report may contain prospective financial information, estimates, or opinions that represent GPG's view of reasonable expectations at a particular time, but such information, estimates, or opinions are not offered as predictions or assurances that a particular level of income or profit will be achieved, that particular events will occur, or that a particular price will be offered or accepted.

Actual results achieved during the period covered by our prospective financial analysis may vary from those described in our report, and the variations may be material. Therefore, no warranty or representation is made by GPG that any of the projected values or results contained in this study will be achieved.

This study should not be the sole basis for programming, planning, designing, financing, or development of any commercial center. This study is for the use of the City of Kalamazoo for general planning purposes only, and is void for other site locations or developers.

-- END OF ANALYSIS --

APPENDIX EXHIBIT A1: Primary Trade Area Community Profile

Community Profile

PTA

Prepared by Gibbs Planning Group

Area: 308.4 square miles

Population Summary	
2000 Total Population	220,235
2010 Total Population	230,628
2016 Total Population	237,299
2016 Group Quarters	8,592
2021 Total Population	244,861
2016-2021 Annual Rate	0.63%
2016 Total Daytime Population	252,487
Workers	131,447
Residents	121,040
Household Summary	
2000 Households	86,713
2000 Average Household Size	2.41
2010 Households	93,247
2010 Average Household Size	2.38
2016 Households	95,700
2016 Average Household Size	2.39
2021 Households	98,700
2021 Average Household Size	2.39
2016-2021 Annual Rate	0.62%
2010 Families	54,419
2010 Average Family Size	2.99
2016 Families	55,025
2016 Average Family Size	3.00
2021 Families	56,321
2021 Average Family Size	3.01
2016-2021 Annual Rate	0.47%
Housing Unit Summary	
2000 Housing Units	91,934
Owner Occupied Housing Units	60.3%
Renter Occupied Housing Units	34.1%
Vacant Housing Units	5.7%
2010 Housing Units	101,762
Owner Occupied Housing Units	56.4%
Renter Occupied Housing Units	35.3%
Vacant Housing Units	8.4%
2016 Housing Units	104,906
Owner Occupied Housing Units	54.9%
Renter Occupied Housing Units	36.3%
Vacant Housing Units	8.8%
2021 Housing Units	108,099
Owner Occupied Housing Units	54.8%
Renter Occupied Housing Units	36.5%
Vacant Housing Units	8.7%
Median Household Income	
2016	$45,512
2021	$52,184
Median Home Value	
2016	$143,982
2021	$176,826
Per Capita Income	
2016	$26,629
2021	$29,193
Median Age	
2010	33.4
2016	34.3
2021	35.3

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

APPENDIX EXHIBIT A2: Primary Trade Area Community Profile

Community Profile

PTA
Area: 308.4 square miles

Prepared by Gibbs Planning Group

2016 Households by Income	
Household Income Base	95,700
<$15,000	16.1%
$15,000 - $24,999	12.2%
$25,000 - $34,999	11.4%
$35,000 - $49,999	13.6%
$50,000 - $74,999	17.3%
$75,000 - $99,999	11.2%
$100,000 - $149,999	10.9%
$150,000 - $199,999	3.5%
$200,000+	3.8%
Average Household Income	$64,393
2021 Households by Income	
Household Income Base	98,700
<$15,000	16.2%
$15,000 - $24,999	11.6%
$25,000 - $34,999	11.4%
$35,000 - $49,999	8.5%
$50,000 - $74,999	18.6%
$75,000 - $99,999	12.5%
$100,000 - $149,999	12.6%
$150,000 - $199,999	4.4%
$200,000+	4.3%
Average Household Income	$70,836
2016 Owner Occupied Housing Units by Value	
Total	57,576
<$50,000	12.3%
$50,000 - $99,999	19.4%
$100,000 - $149,999	20.8%
$150,000 - $199,999	17.9%
$200,000 - $249,999	10.2%
$250,000 - $299,999	5.3%
$300,000 - $399,999	5.7%
$400,000 - $499,999	3.9%
$500,000 - $749,999	3.4%
$750,000 - $999,999	0.7%
$1,000,000 +	0.5%
Average Home Value	$183,208
2021 Owner Occupied Housing Units by Value	
Total	59,277
<$50,000	8.2%
$50,000 - $99,999	15.0%
$100,000 - $149,999	14.4%
$150,000 - $199,999	23.1%
$200,000 - $249,999	15.6%
$250,000 - $299,999	7.8%
$300,000 - $399,999	6.3%
$400,000 - $499,999	4.3%
$500,000 - $749,999	3.9%
$750,000 - $999,999	0.9%
$1,000,000 +	0.4%
Average Home Value	$207,534

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

Gibbs Planning Group	Community Profile	
	PTA	Prepared by Gibbs Planning Group
	Area: 308.4 square miles	

2010 Population by Age	
Total	230,626
0 - 4	6.4%
5 - 9	6.2%
10 - 14	6.3%
15 - 24	19.5%
25 - 34	13.6%
35 - 44	11.7%
45 - 54	13.0%
55 - 64	11.1%
65 - 74	6.2%
75 - 84	4.0%
85 +	2.0%
18 +	77.4%
2016 Population by Age	
Total	237,298
0 - 4	6.0%
5 - 9	5.8%
10 - 14	5.9%
15 - 24	19.6%
25 - 34	13.6%
35 - 44	11.3%
45 - 54	11.8%
55 - 64	11.9%
65 - 74	7.9%
75 - 84	4.1%
85 +	2.2%
18 +	78.7%
2021 Population by Age	
Total	244,859
0 - 4	5.9%
5 - 9	5.6%
10 - 14	5.8%
15 - 24	18.8%
25 - 34	13.6%
35 - 44	11.4%
45 - 54	11.0%
55 - 64	11.6%
65 - 74	9.4%
75 - 84	4.7%
85 +	2.2%
18 +	79.2%
2010 Population by Sex	
Males	112,467
Females	118,161
2016 Population by Sex	
Males	115,988
Females	121,311
2021 Population by Sex	
Males	119,871
Females	124,990

APPENDIX EXHIBIT A4: Primary Trade Area Community Profile

Community Profile

PTA
Area: 308.4 square miles

Prepared by Gibbs Planning Group

2010 Population by Race/Ethnicity	
Total	230,628
White Alone	80.4%
Black Alone	11.8%
American Indian Alone	0.4%
Asian Alone	2.2%
Pacific Islander Alone	0.0%
Some Other Race Alone	1.6%
Two or More Races	3.5%
Hispanic Origin	4.2%
Diversity Index	39.2
2016 Population by Race/Ethnicity	
Total	237,300
White Alone	78.7%
Black Alone	12.1%
American Indian Alone	0.4%
Asian Alone	2.8%
Pacific Islander Alone	0.1%
Some Other Race Alone	2.0%
Two or More Races	4.0%
Hispanic Origin	5.3%
Diversity Index	42.9
2021 Population by Race/Ethnicity	
Total	244,863
White Alone	77.1%
Black Alone	12.5%
American Indian Alone	0.4%
Asian Alone	3.2%
Pacific Islander Alone	0.1%
Some Other Race Alone	2.3%
Two or More Races	4.5%
Hispanic Origin	6.4%
Diversity Index	46.2
2010 Population by Relationship and Household Type	
Total	230,628
In Households	96.3%
In Family Households	72.8%
Householder	23.6%
Spouse	16.9%
Child	27.5%
Other relative	2.4%
Nonrelative	2.4%
In Nonfamily Households	23.5%
In Group Quarters	3.7%
Institutionalized Population	0.8%
Noninstitutionalized Population	2.9%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

Gibbs Planning Group	Community Profile	
	PTA	Prepared by Gibbs Planning Group
	Area: 308.4 square miles	

2016 Population 25+ by Educational Attainment	
Total	148,887
Less than 9th Grade	2.0%
9th - 12th Grade, No Diploma	4.8%
High School Graduate	19.3%
GED/Alternative Credential	3.3%
Some College, No Degree	24.0%
Associate Degree	9.9%
Bachelor's Degree	22.0%
Graduate/Professional Degree	14.6%
2016 Population 15+ by Marital Status	
Total	195,331
Never Married	40.2%
Married	43.3%
Widowed	4.9%
Divorced	11.6%
2016 Civilian Population 16+ in Labor Force	
Civilian Employed	93.6%
Civilian Unemployed	6.4%
2016 Employed Population 16+ by Industry	
Total	118,458
Agriculture/Mining	1.1%
Construction	3.6%
Manufacturing	18.1%
Wholesale Trade	2.3%
Retail Trade	11.5%
Transportation/Utilities	2.7%
Information	1.1%
Finance/Insurance/Real Estate	5.6%
Services	51.5%
Public Administration	2.6%
2016 Employed Population 16+ by Occupation	
Total	118,459
White Collar	60.7%
Management/Business/Financial	14.0%
Professional	23.9%
Sales	10.5%
Administrative Support	12.3%
Services	19.6%
Blue Collar	19.7%
Farming/Forestry/Fishing	0.5%
Construction/Extraction	3.3%
Installation/Maintenance/Repair	2.7%
Production	7.6%
Transportation/Material Moving	5.6%
2010 Population By Urban/ Rural Status	
Total Population	230,628
Population Inside Urbanized Area	85.0%
Population Inside Urbanized Cluster	2.6%
Rural Population	12.4%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

APPENDIX EXHIBIT A6: Primary Trade Area Community Profile

Community Profile

PTA
Area: 308.4 square miles

Prepared by Gibbs Planning Group

2010 Households by Type	
Total	93,247
Households with 1 Person	30.6%
Households with 2+ People	69.4%
Family Households	58.4%
Husband-wife Families	41.9%
With Related Children	17.7%
Other Family (No Spouse Present)	16.5%
Other Family with Male Householder	4.2%
With Related Children	2.5%
Other Family with Female Householder	12.3%
With Related Children	8.6%
Nonfamily Households	11.0%
All Households with Children	29.2%
Multigenerational Households	2.3%
Unmarried Partner Households	7.6%
Male-female	6.9%
Same-sex	0.7%
2010 Households by Size	
Total	93,247
1 Person Household	30.6%
2 Person Household	34.2%
3 Person Household	14.8%
4 Person Household	12.1%
5 Person Household	5.3%
6 Person Household	1.9%
7 + Person Household	1.1%
2010 Households by Tenure and Mortgage Status	
Total	93,247
Owner Occupied	61.5%
Owned with a Mortgage/Loan	43.5%
Owned Free and Clear	18.0%
Renter Occupied	38.5%
2010 Housing Units By Urban/ Rural Status	
Total Housing Units	101,762
Housing Units Inside Urbanized Area	85.9%
Housing Units Inside Urbanized Cluster	2.6%
Rural Housing Units	11.5%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

APPENDIX EXHIBIT A7: Primary Trade Area Community Profile

Community Profile

PTA   Prepared by Gibbs Planning Group
Area: 308.4 square miles

Top 3 Tapestry Segments		
	1.	Traditional Living (12B)
	2.	Green Acres (6A)
	3.	College Towns (14B)

2016 Consumer Spending	
Apparel & Services: Total $	$164,514,661
Average Spent	$1,719.07
Spending Potential Index	85
Education: Total $	$122,853,100
Average Spent	$1,283.73
Spending Potential Index	91
Entertainment/Recreation: Total $	$233,386,885
Average Spent	$2,438.73
Spending Potential Index	84
Food at Home: Total $	$413,428,087
Average Spent	$4,320.04
Spending Potential Index	87
Food Away from Home: Total $	$254,887,649
Average Spent	$2,663.40
Spending Potential Index	86
Health Care: Total $	$421,761,907
Average Spent	$4,407.13
Spending Potential Index	83
HH Furnishings & Equipment: Total $	$142,519,485
Average Spent	$1,489.23
Spending Potential Index	84
Personal Care Products & Services: Total $	$58,190,758
Average Spent	$608.05
Spending Potential Index	83
Shelter: Total $	$1,263,431,682
Average Spent	$13,202.00
Spending Potential Index	85
Support Payments/Cash Contributions/Gifts in Kind:	$185,743,039
Average Spent	$1,940.89
Spending Potential Index	84
Travel: Total $	$142,775,082
Average Spent	$1,491.90
Spending Potential Index	80
Vehicle Maintenance & Repairs: Total $	$84,055,318
Average Spent	$878.32
Spending Potential Index	85

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2013 and 2014 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

APPENDIX EXHIBIT B1: Total Trade Area Community Profile

Community Profile

TTA
Area: 2,667.29 square miles

Prepared by Gibbs Planning Group

Population Summary	
2000 Total Population	592,521
2010 Total Population	599,406
2016 Total Population	607,964
2016 Group Quarters	14,536
2021 Total Population	618,666
2016-2021 Annual Rate	0.35%
2016 Total Daytime Population	612,618
Workers	287,526
Residents	325,092
Household Summary	
2000 Households	228,830
2000 Average Household Size	2.50
2010 Households	237,434
2010 Average Household Size	2.46
2016 Households	240,894
2016 Average Household Size	2.46
2021 Households	245,233
2021 Average Household Size	2.46
2016-2021 Annual Rate	0.36%
2010 Families	152,851
2010 Average Family Size	3.00
2016 Families	153,132
2016 Average Family Size	3.01
2021 Families	154,837
2021 Average Family Size	3.01
2016-2021 Annual Rate	0.22%
Housing Unit Summary	
2000 Housing Units	254,796
Owner Occupied Housing Units	64.0%
Renter Occupied Housing Units	25.8%
Vacant Housing Units	10.2%
2010 Housing Units	274,317
Owner Occupied Housing Units	59.8%
Renter Occupied Housing Units	26.7%
Vacant Housing Units	13.4%
2016 Housing Units	279,938
Owner Occupied Housing Units	58.5%
Renter Occupied Housing Units	27.6%
Vacant Housing Units	13.9%
2021 Housing Units	285,207
Owner Occupied Housing Units	58.4%
Renter Occupied Housing Units	27.6%
Vacant Housing Units	14.0%
Median Household Income	
2016	$45,818
2021	$52,010
Median Home Value	
2016	$133,449
2021	$169,750
Per Capita Income	
2016	$25,095
2021	$27,594
Median Age	
2010	37.4
2016	38.4
2021	39.3

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

APPENDIX EXHIBIT B2: Total Trade Area Community Profile

Community Profile

TTA
Area: 2,667.29 square miles

Prepared by Gibbs Planning Group

2016 Households by Income	
Household Income Base	240,894
<$15,000	14.7%
$15,000 - $24,999	12.1%
$25,000 - $34,999	11.7%
$35,000 - $49,999	14.6%
$50,000 - $74,999	18.5%
$75,000 - $99,999	11.8%
$100,000 - $149,999	10.5%
$150,000 - $199,999	3.1%
$200,000+	2.9%
Average Household Income	$62,077
2021 Households by Income	
Household Income Base	245,233
<$15,000	14.9%
$15,000 - $24,999	11.8%
$25,000 - $34,999	11.9%
$35,000 - $49,999	9.1%
$50,000 - $74,999	19.2%
$75,000 - $99,999	13.3%
$100,000 - $149,999	12.5%
$150,000 - $199,999	4.0%
$200,000+	3.4%
Average Household Income	$68,375
2016 Owner Occupied Housing Units by Value	
Total	163,680
<$50,000	14.3%
$50,000 - $99,999	22.5%
$100,000 - $149,999	19.7%
$150,000 - $199,999	15.8%
$200,000 - $249,999	9.0%
$250,000 - $299,999	5.1%
$300,000 - $399,999	6.2%
$400,000 - $499,999	2.9%
$500,000 - $749,999	3.3%
$750,000 - $999,999	0.6%
$1,000,000 +	0.6%
Average Home Value	$174,980
2021 Owner Occupied Housing Units by Value	
Total	166,435
<$50,000	9.7%
$50,000 - $99,999	17.1%
$100,000 - $149,999	15.1%
$150,000 - $199,999	20.6%
$200,000 - $249,999	13.5%
$250,000 - $299,999	7.9%
$300,000 - $399,999	7.4%
$400,000 - $499,999	3.4%
$500,000 - $749,999	4.0%
$750,000 - $999,999	0.8%
$1,000,000 +	0.5%
Average Home Value	$202,098

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

APPENDIX EXHIBIT B3: Total Trade Area Community Profile

Community Profile

TTA   Prepared by Gibbs Planning Group
Area: 2,667.29 square miles

2010 Population by Age	
Total	599,404
0 - 4	6.4%
5 - 9	6.5%
10 - 14	6.8%
15 - 24	15.3%
25 - 34	12.2%
35 - 44	12.2%
45 - 54	14.6%
55 - 64	12.5%
65 - 74	7.3%
75 - 84	4.4%
85 +	2.0%
18 +	76.1%
2016 Population by Age	
Total	607,962
0 - 4	6.0%
5 - 9	6.1%
10 - 14	6.3%
15 - 24	15.2%
25 - 34	12.4%
35 - 44	11.6%
45 - 54	13.0%
55 - 64	13.6%
65 - 74	9.2%
75 - 84	4.5%
85 +	2.1%
18 +	77.8%
2021 Population by Age	
Total	618,668
0 - 4	5.9%
5 - 9	5.9%
10 - 14	6.2%
15 - 24	14.5%
25 - 34	12.5%
35 - 44	11.6%
45 - 54	11.8%
55 - 64	13.4%
65 - 74	10.8%
75 - 84	5.3%
85 +	2.1%
18 +	78.3%
2010 Population by Sex	
Males	294,291
Females	305,115
2016 Population by Sex	
Males	299,171
Females	308,792
2021 Population by Sex	
Males	305,220
Females	313,446

Gibbs Planning Group	Community Profile	
	TTA	Prepared by Gibbs Planning Group
	Area: 2,667.29 square miles	

2010 Population by Race/Ethnicity	
Total	599,407
White Alone	82.0%
Black Alone	10.8%
American Indian Alone	0.6%
Asian Alone	1.5%
Pacific Islander Alone	0.0%
Some Other Race Alone	2.1%
Two or More Races	2.9%
Hispanic Origin	5.0%
Diversity Index	38.1
2016 Population by Race/Ethnicity	
Total	607,964
White Alone	80.7%
Black Alone	10.9%
American Indian Alone	0.6%
Asian Alone	1.9%
Pacific Islander Alone	0.0%
Some Other Race Alone	2.5%
Two or More Races	3.4%
Hispanic Origin	5.9%
Diversity Index	41.1
2021 Population by Race/Ethnicity	
Total	618,667
White Alone	79.6%
Black Alone	11.0%
American Indian Alone	0.6%
Asian Alone	2.3%
Pacific Islander Alone	0.0%
Some Other Race Alone	2.7%
Two or More Races	3.8%
Hispanic Origin	6.7%
Diversity Index	43.5
2010 Population by Relationship and Household Type	
Total	599,406
In Households	97.6%
In Family Households	79.2%
Householder	25.5%
Spouse	18.5%
Child	29.9%
Other relative	2.7%
Nonrelative	2.6%
In Nonfamily Households	18.3%
In Group Quarters	2.4%
Institutionalized Population	0.9%
Noninstitutionalized Population	1.5%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

APPENDIX EXHIBIT B5: Total Trade Area Community Profile

Community Profile

TTA
Area: 2,667.29 square miles

Prepared by Gibbs Planning Group

2016 Population 25+ by Educational Attainment	
Total	403,469
Less than 9th Grade	3.1%
9th - 12th Grade, No Diploma	6.2%
High School Graduate	25.5%
GED/Alternative Credential	4.4%
Some College, No Degree	24.4%
Associate Degree	9.6%
Bachelor's Degree	16.5%
Graduate/Professional Degree	10.2%
2016 Population 15+ by Marital Status	
Total	496,114
Never Married	33.4%
Married	48.1%
Widowed	5.8%
Divorced	12.7%
2016 Civilian Population 16+ in Labor Force	
Civilian Employed	93.9%
Civilian Unemployed	6.1%
2016 Employed Population 16+ by Industry	
Total	286,690
Agriculture/Mining	2.3%
Construction	4.6%
Manufacturing	22.0%
Wholesale Trade	2.2%
Retail Trade	10.8%
Transportation/Utilities	3.6%
Information	1.0%
Finance/Insurance/Real Estate	4.6%
Services	45.6%
Public Administration	3.2%
2016 Employed Population 16+ by Occupation	
Total	286,688
White Collar	54.7%
Management/Business/Financial	12.6%
Professional	20.1%
Sales	9.6%
Administrative Support	12.3%
Services	18.6%
Blue Collar	26.8%
Farming/Forestry/Fishing	1.4%
Construction/Extraction	4.5%
Installation/Maintenance/Repair	3.5%
Production	11.0%
Transportation/Material Moving	6.4%
2010 Population By Urban/ Rural Status	
Total Population	599,406
Population Inside Urbanized Area	55.8%
Population Inside Urbanized Cluster	10.2%
Rural Population	34.1%

Gibbs Planning Group

Community Profile

TTA
Area: 2,667.29 square miles

Prepared by Gibbs Planning Group

2010 Households by Type	
Total	237,434
Households with 1 Person	28.0%
Households with 2+ People	72.0%
Family Households	64.4%
Husband-wife Families	46.6%
With Related Children	18.8%
Other Family (No Spouse Present)	17.8%
Other Family with Male Householder	4.8%
With Related Children	2.9%
Other Family with Female Householder	13.0%
With Related Children	8.9%
Nonfamily Households	7.6%
All Households with Children	31.2%
Multigenerational Households	3.1%
Unmarried Partner Households	7.4%
Male-female	6.8%
Same-sex	0.6%
2010 Households by Size	
Total	237,434
1 Person Household	28.0%
2 Person Household	35.0%
3 Person Household	15.2%
4 Person Household	12.4%
5 Person Household	5.8%
6 Person Household	2.2%
7 + Person Household	1.4%
2010 Households by Tenure and Mortgage Status	
Total	237,434
Owner Occupied	69.1%
Owned with a Mortgage/Loan	47.4%
Owned Free and Clear	21.7%
Renter Occupied	30.9%
2010 Housing Units By Urban/ Rural Status	
Total Housing Units	274,317
Housing Units Inside Urbanized Area	54.9%
Housing Units Inside Urbanized Cluster	10.6%
Rural Housing Units	34.4%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

APPENDIX EXHIBIT B7: Total Trade Area Community Profile

Community Profile

TTA
Area: 2,667.29 square miles

Prepared by Gibbs Planning Group

Top 3 Tapestry Segments		
	1.	Salt of the Earth (6B)
	2.	Traditional Living (12B)
	3.	Green Acres (6A)

2016 Consumer Spending	
Apparel & Services: Total $	$389,047,818
Average Spent	$1,615.02
Spending Potential Index	80
Education: Total $	$270,257,758
Average Spent	$1,121.89
Spending Potential Index	79
Entertainment/Recreation: Total $	$572,996,394
Average Spent	$2,378.62
Spending Potential Index	82
Food at Home: Total $	$1,010,141,102
Average Spent	$4,193.30
Spending Potential Index	84
Food Away from Home: Total $	$606,550,058
Average Spent	$2,517.91
Spending Potential Index	81
Health Care: Total $	$1,078,049,437
Average Spent	$4,475.20
Spending Potential Index	84
HH Furnishings & Equipment: Total $	$345,116,797
Average Spent	$1,432.65
Spending Potential Index	81
Personal Care Products & Services: Total $	$141,357,231
Average Spent	$586.80
Spending Potential Index	80
Shelter: Total $	$2,953,642,327
Average Spent	$12,261.17
Spending Potential Index	79
Support Payments/Cash Contributions/Gifts in Kind:	$465,734,798
Average Spent	$1,933.36
Spending Potential Index	83
Travel: Total $	$347,032,707
Average Spent	$1,440.60
Spending Potential Index	77
Vehicle Maintenance & Repairs: Total $	$207,788,120
Average Spent	$862.57
Spending Potential Index	83

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2013 and 2014 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2016 and 2021 Esri converted Census 2000 data into 2010 geography.

APPENDIX EXHIBIT C1: Primary Trade Area Business Profile

Gibbs Planning Group — Business Summary

PTA
Area: 308.4 square miles

Prepared by Gibbs Planning Group

Data for all businesses in area

Total Businesses:	9,931
Total Employees:	158,563
Total Residential Population:	237,299
Employee/Residential Population Ratio:	0.67:1

by SIC Codes	Businesses Number	Percent	Employees Number	Percent
Agriculture & Mining	271	2.7%	2,053	1.3%
Construction	699	7.0%	6,117	3.9%
Manufacturing	378	3.8%	16,730	10.6%
Transportation	225	2.3%	3,875	2.4%
Communication	86	0.9%	1,074	0.7%
Utility	18	0.2%	391	0.2%
Wholesale Trade	372	3.7%	10,978	6.9%
Retail Trade Summary	2,030	20.4%	32,057	20.2%
Home Improvement	133	1.3%	1,656	1.0%
General Merchandise Stores	63	0.6%	3,272	2.1%
Food Stores	181	1.8%	4,859	3.1%
Auto Dealers, Gas Stations, Auto Aftermarket	258	2.6%	2,889	1.8%
Apparel & Accessory Stores	121	1.2%	1,173	0.7%
Furniture & Home Furnishings	169	1.7%	1,521	1.0%
Eating & Drinking Places	572	5.8%	11,833	7.5%
Miscellaneous Retail	533	5.4%	4,854	3.1%
Finance, Insurance, Real Estate Summary	1,309	13.2%	16,362	10.3%
Banks, Savings & Lending Institutions	537	5.4%	1,528	1.0%
Securities Brokers	135	1.4%	1,108	0.7%
Insurance Carriers & Agents	178	1.8%	1,606	1.0%
Real Estate, Holding, Other Investment Offices	459	4.6%	12,120	7.6%
Services Summary	3,984	40.1%	62,694	39.5%
Hotels & Lodging	56	0.6%	1,398	0.9%
Automotive Services	262	2.6%	1,698	1.1%
Motion Pictures & Amusements	287	2.9%	2,797	1.8%
Health Services	673	6.8%	15,495	9.8%
Legal Services	175	1.8%	1,107	0.7%
Education Institutions & Libraries	221	2.2%	16,818	10.6%
Other Services	2,311	23.3%	23,381	14.7%
Government	278	2.8%	5,825	3.7%
Unclassified Establishments	281	2.8%	406	0.3%
Totals	9,931	100.0%	158,563	100.0%

Gibbs Planning Group | **Business Summary**

PTA
Area: 308.4 square miles

Prepared by Gibbs Planning Group

by NAICS Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	70	0.7%	714	0.5%
Mining	4	0.0%	110	0.1%
Utilities	9	0.1%	229	0.1%
Construction	754	7.6%	6,950	4.4%
Manufacturing	395	4.0%	16,600	10.5%
Wholesale Trade	366	3.7%	10,959	6.9%
Retail Trade	1,415	14.2%	19,757	12.5%
Motor Vehicle & Parts Dealers	188	1.9%	2,613	1.6%
Furniture & Home Furnishings Stores	74	0.7%	799	0.5%
Electronics & Appliance Stores	77	0.8%	655	0.4%
Bldg Material & Garden Equipment & Supplies	132	1.3%	1,657	1.0%
Food & Beverage Stores	160	1.6%	4,496	2.8%
Health & Personal Care Stores	139	1.4%	1,847	1.2%
Gasoline Stations	70	0.7%	277	0.2%
Clothing & Clothing Accessories Stores	161	1.6%	1,364	0.9%
Sport Goods, Hobby, Book, & Music Stores	113	1.1%	1,271	0.8%
General Merchandise Stores	63	0.6%	3,272	2.1%
Miscellaneous Store Retailers	213	2.1%	1,397	0.9%
Nonstore Retailers	25	0.3%	110	0.1%
Transportation & Warehousing	150	1.5%	3,202	2.0%
Information	187	1.9%	2,225	1.4%
Finance & Insurance	859	8.6%	4,264	2.7%
Central Bank/Credit Intermediation & Related	542	5.5%	1,540	1.0%
Securities, Commodity Contracts & Other Financial	139	1.4%	1,118	0.7%
Insurance Carriers & Related Activities; Funds, Trusts	178	1.8%	1,606	1.0%
Real Estate, Rental & Leasing	573	5.8%	12,325	7.8%
Professional, Scientific & Tech Services	886	8.9%	6,796	4.3%
Legal Services	189	1.9%	1,244	0.8%
Management of Companies & Enterprises	5	0.1%	232	0.1%
Administrative & Support & Waste Management &	424	4.3%	4,464	2.8%
Educational Services	260	2.6%	16,879	10.6%
Health Care & Social Assistance	976	9.8%	22,248	14.0%
Arts, Entertainment & Recreation	211	2.1%	2,459	1.6%
Accommodation & Food Services	641	6.5%	13,402	8.5%
Accommodation	56	0.6%	1,398	0.9%
Food Services & Drinking Places	585	5.9%	12,004	7.6%
Other Services (except Public Administration)	1,185	11.9%	8,447	5.3%
Automotive Repair & Maintenance	194	2.0%	1,030	0.6%
Public Administration	281	2.8%	5,896	3.7%
Unclassified Establishments	281	2.8%	406	0.3%
Total	9,931	100.0%	158,563	100.0%

Gibbs Planning Group

Business Summary

Prepared by Gibbs Planning Group

TTA
Area: 2,667.29 square miles

Data for all businesses in area

Total Businesses:	24,175
Total Employees:	337,485
Total Residential Population:	607,964
Employee/Residential Population Ratio:	0.56:1

by SIC Codes	Businesses Number	Percent	Employees Number	Percent
Agriculture & Mining	838	3.5%	6,087	1.8%
Construction	1,884	7.8%	11,936	3.5%
Manufacturing	998	4.1%	46,082	13.7%
Transportation	639	2.6%	8,603	2.5%
Communication	188	0.8%	2,225	0.7%
Utility	70	0.3%	1,416	0.4%
Wholesale Trade	867	3.6%	19,893	5.9%
Retail Trade Summary	4,800	19.9%	66,125	19.6%
Home Improvement	379	1.6%	3,884	1.2%
General Merchandise Stores	181	0.7%	7,041	2.1%
Food Stores	485	2.0%	10,885	3.2%
Auto Dealers, Gas Stations, Auto Aftermarket	683	2.8%	7,044	2.1%
Apparel & Accessory Stores	232	1.0%	1,716	0.5%
Furniture & Home Furnishings	336	1.4%	2,555	0.8%
Eating & Drinking Places	1,265	5.2%	22,137	6.6%
Miscellaneous Retail	1,240	5.1%	10,862	3.2%
Finance, Insurance, Real Estate Summary	2,791	11.5%	21,488	6.4%
Banks, Savings & Lending Institutions	1,218	5.0%	3,395	1.0%
Securities Brokers	230	1.0%	1,420	0.4%
Insurance Carriers & Agents	407	1.7%	2,501	0.7%
Real Estate, Holding, Other Investment Offices	937	3.9%	14,172	4.2%
Services Summary	9,412	38.9%	133,713	39.6%
Hotels & Lodging	234	1.0%	3,937	1.2%
Automotive Services	695	2.9%	3,346	1.0%
Motion Pictures & Amusements	619	2.6%	9,184	2.7%
Health Services	1,424	5.9%	32,560	9.6%
Legal Services	314	1.3%	1,726	0.5%
Education Institutions & Libraries	683	2.8%	31,740	9.4%
Other Services	5,444	22.5%	51,219	15.2%
Government	1,085	4.5%	19,317	5.7%
Unclassified Establishments	602	2.5%	599	0.2%
Totals	24,175	100.0%	337,485	100.0%

APPENDIX EXHIBIT D2: Total Trade Area Business Profile

Business Summary

TTA
Area: 2,667.29 square miles

Prepared by Gibbs Planning Group

| by NAICS Codes	Businesses Number	Businesses Percent	Employees Number	Employees Percent
Agriculture, Forestry, Fishing & Hunting	342	1.4%	3,400	1.0%
Mining	15	0.1%	151	0.0%
Utilities	40	0.2%	1,038	0.3%
Construction	2,006	8.3%	13,160	3.9%
Manufacturing	1,039	4.3%	45,663	13.5%
Wholesale Trade	853	3.5%	19,852	5.9%
Retail Trade	3,436	14.2%	43,186	12.8%
Motor Vehicle & Parts Dealers	472	2.0%	5,610	1.7%
Furniture & Home Furnishings Stores	143	0.6%	1,210	0.4%
Electronics & Appliance Stores	157	0.6%	1,282	0.4%
Bldg Material & Garden Equipment & Supplies	370	1.5%	3,856	1.1%
Food & Beverage Stores	448	1.9%	10,287	3.0%
Health & Personal Care Stores	301	1.2%	5,236	1.6%
Gasoline Stations	211	0.9%	1,434	0.4%
Clothing & Clothing Accessories Stores	298	1.2%	2,009	0.6%
Sport Goods, Hobby, Book, & Music Stores	254	1.1%	1,959	0.6%
General Merchandise Stores	181	0.7%	7,041	2.1%
Miscellaneous Store Retailers	535	2.2%	2,896	0.9%
Nonstore Retailers	67	0.3%	365	0.1%
Transportation & Warehousing	443	1.8%	7,013	2.1%
Information	418	1.7%	4,785	1.4%
Finance & Insurance	1,877	7.8%	7,378	2.2%
Central Bank/Credit Intermediation & Related	1,230	5.1%	3,424	1.0%
Securities, Commodity Contracts & Other Financial	240	1.0%	1,453	0.4%
Insurance Carriers & Related Activities; Funds, Trusts	407	1.7%	2,501	0.7%
Real Estate, Rental & Leasing	1,193	4.9%	16,628	4.9%
Professional, Scientific & Tech Services	1,707	7.1%	11,605	3.4%
Legal Services	351	1.5%	1,975	0.6%
Management of Companies & Enterprises	13	0.1%	325	0.1%
Administrative & Support & Waste Management &	976	4.0%	9,159	2.7%
Educational Services	732	3.0%	31,691	9.4%
Health Care & Social Assistance	2,152	8.9%	44,645	13.2%
Arts, Entertainment & Recreation	512	2.1%	8,896	2.6%
Accommodation & Food Services	1,519	6.3%	26,323	7.8%
Accommodation	234	1.0%	3,937	1.2%
Food Services & Drinking Places	1,286	5.3%	22,386	6.6%
Other Services (except Public Administration)	3,208	13.3%	22,534	6.7%
Automotive Repair & Maintenance	541	2.2%	2,291	0.7%
Public Administration	1,092	4.5%	19,452	5.8%
Unclassified Establishments	602	2.5%	599	0.2%
Total	24,175	100.0%	337,485	100.0%

Tapestry Segmentation Area Profile

Gibbs Planning Group

PTA
Area: 308.4 square miles

Prepared by Gibbs Planning Group

Top Twenty Tapestry

Rank	Tapestry Segment	2016 Households Percent	Cumulativ Percent	2016 U.S. Households Percent	Cumulativ Percent	Index
1	Traditional Living (12B)	12.8%	12.8%	2.0%	2.0%	656
2	Green Acres (6A)	10.8%	23.6%	3.2%	5.2%	339
3	College Towns (14B)	9.1%	32.7%	0.9%	6.1%	960
4	Rustbelt Traditions (5D)	7.3%	40.0%	2.2%	8.3%	330
5	Dorms to Diplomas (14C)	5.2%	45.2%	0.5%	8.8%	1,035
	Subtotal	**45.2%**		**8.8%**		
6	Old and Newcomers (8F)	5.2%	50.4%	2.3%	11.1%	226
7	In Style (5B)	4.5%	54.9%	2.3%	13.4%	200
8	Salt of the Earth (6B)	4.4%	59.3%	2.9%	16.3%	152
9	Middleburg (4C)	4.1%	63.4%	2.8%	19.1%	144
10	Retirement Communities (9E)	4.0%	67.4%	1.2%	20.3%	328
	Subtotal	**22.2%**		**11.5%**		
11	Young and Restless (11B)	3.9%	71.3%	1.7%	22.0%	229
12	Comfortable Empty Nesters (5A)	3.0%	74.3%	2.5%	24.5%	122
13	Hardscrabble Road (8G)	2.9%	77.2%	1.2%	25.7%	238
14	Set to Impress (11D)	2.8%	80.0%	1.4%	27.1%	200
15	Bright Young Professionals (8C)	2.6%	82.6%	2.2%	29.3%	115
	Subtotal	**15.2%**		**9.0%**		
16	Midlife Constants (5E)	2.0%	84.6%	2.5%	31.8%	81
17	Exurbanites (1E)	1.9%	86.5%	1.9%	33.7%	100
18	City Commons (11E)	1.9%	88.4%	0.9%	34.6%	208
19	Savvy Suburbanites (1D)	1.5%	89.9%	3.0%	37.6%	51
20	Soccer Moms (4A)	1.2%	91.1%	2.8%	40.4%	42
	Subtotal	**8.5%**		**11.1%**		
	Total	**91.3%**		**40.6%**		**225**

Top Ten Tapestry Segments Site vs. U.S.
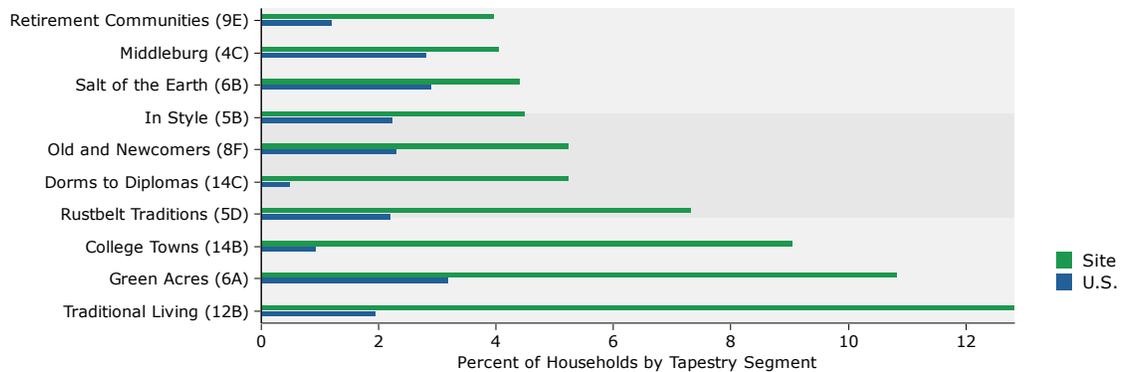
Percent of Households by Tapestry Segment

Legend: Site, U.S.

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

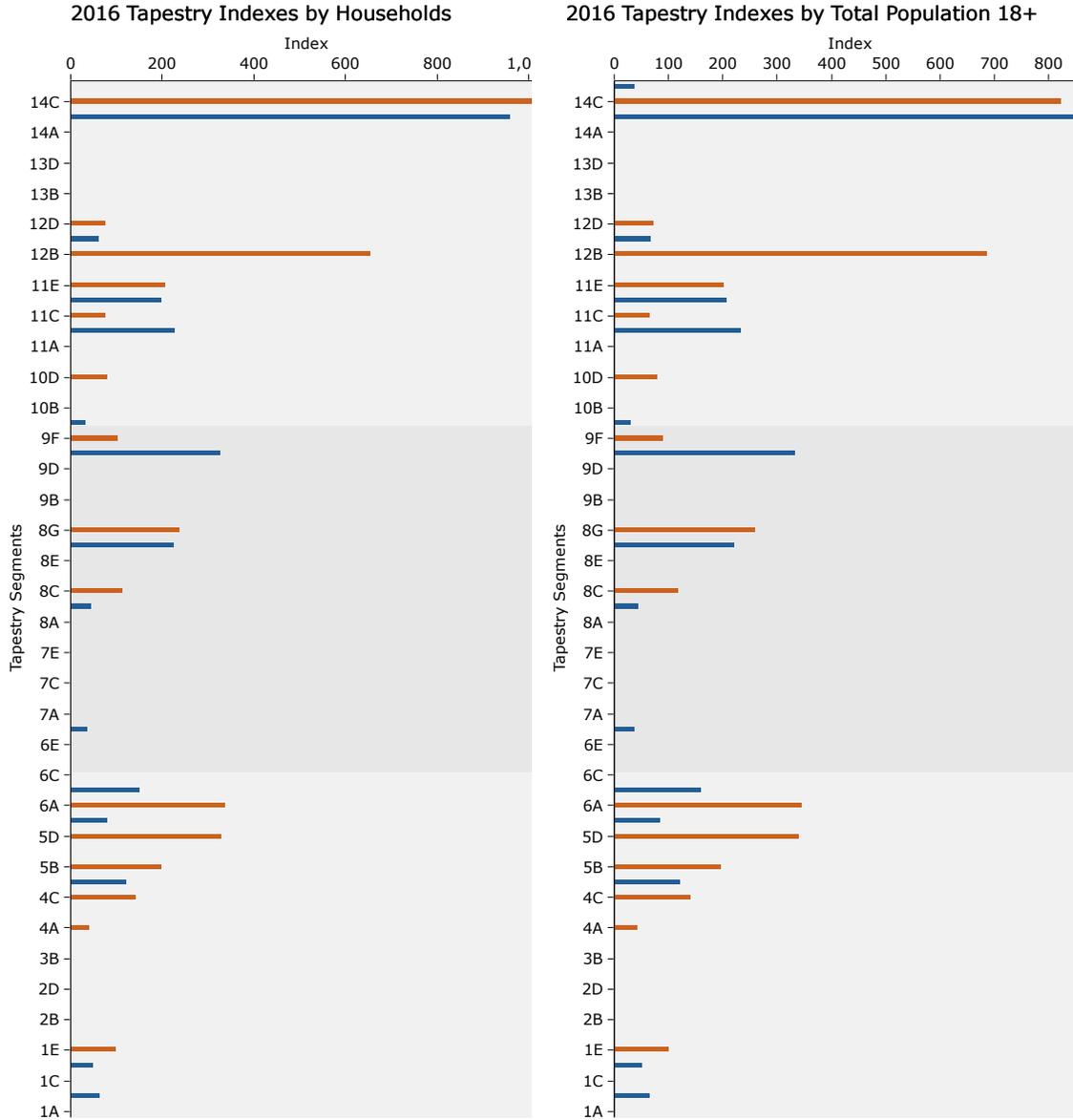# APPENDIX EXHIBIT E2: Tapestry Segmentation Area Profile

Tapestry Segmentation Area Profile

PTA
Area: 308.4 square miles

Prepared by Gibbs Planning Group

2016 Tapestry Indexes by Households

2016 Tapestry Indexes by Total Population 18+

Tapestry Segmentation Area Profile

Gibbs Planning Group

PTA
Area: 308.4 square miles

Prepared by Gibbs Planning Group

Tapestry LifeMode Groups	2016 Households			2016 Adult Population		
	Number	Percent	Index	Number	Percent	Index
Total:	95,701	100.0%		186,836	100.0%	
1. Affluent Estates	**4,310**	**4.5%**	**46**	**9,096**	**4.9%**	**47**
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	990	1.0%	64	2,217	1.2%	67
Boomburbs (1C)	0	0.0%	0	0	0.0%	0
Savvy Suburbanites (1D)	1,464	1.5%	51	3,170	1.7%	53
Exurbanites (1E)	1,856	1.9%	100	3,709	2.0%	102
2. Upscale Avenues	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	0	0.0%	0	0	0.0%	0
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Enterprising Professionals	0	0.0%	0	0	0.0%	0
3. Uptown Individuals	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
4. Family Landscapes	**5,051**	**5.3%**	**71**	**9,912**	**5.3%**	**69**
Soccer Moms (4A)	1,156	1.2%	42	2,474	1.3%	44
Home Improvement (4B)	0	0.0%	0	0	0.0%	0
Middleburg (4C)	3,895	4.1%	144	7,438	4.0%	141
5. GenXurban	**16,149**	**16.9%**	**147**	**30,517**	**16.3%**	**148**
Comfortable Empty Nesters	2,880	3.0%	122	5,626	3.0%	122
In Style (5B)	4,310	4.5%	200	7,769	4.2%	198
Parks and Rec (5C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	7,018	7.3%	330	13,356	7.1%	342
Midlife Constants (5E)	1,941	2.0%	81	3,766	2.0%	85
6. Cozy Country Living	**15,424**	**16.1%**	**133**	**31,702**	**17.0%**	**142**
Green Acres (6A)	10,370	10.8%	339	21,371	11.4%	347
Salt of the Earth (6B)	4,225	4.4%	152	8,782	4.7%	161
The Great Outdoors (6C)	0	0.0%	0	0	0.0%	0
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Heartland Communities (6F)	829	0.9%	37	1,549	0.8%	38
7. Ethnic Enclaves	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
American Dreamers (7C)	0	0.0%	0	0	0.0%	0
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

Tapestry Segmentation Area Profile

Gibbs Planning Group

PTA
Area: 308.4 square miles

Prepared by Gibbs Planning Group

Tapestry LifeMode Groups	2016 Households			2016 Adult Population		
	Number	**Percent**	**Index**	**Number**	**Percent**	**Index**
Total:	95,701	100.0%		186,836	100.0%	
8. Middle Ground	**10,918**	**11.4%**	**104**	**19,668**	**10.5%**	**103**
City Lights (8A)	0	0.0%	0	0	0.0%	0
Emerald City (8B)	648	0.7%	48	1,053	0.6%	46
Bright Young Professionals	2,444	2.6%	115	4,468	2.4%	119
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
Front Porches (8E)	0	0.0%	0	0	0.0%	0
Old and Newcomers (8F)	5,019	5.2%	226	8,397	4.5%	223
Hardscrabble Road (8G)	2,807	2.9%	238	5,750	3.1%	261
9. Senior Styles	**4,615**	**4.8%**	**84**	**7,496**	**4.0%**	**80**
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	0	0.0%	0	0	0.0%	0
The Elders (9C)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Retirement Communities (9E)	3,812	4.0%	328	6,356	3.4%	334
Social Security Set (9F)	803	0.8%	104	1,140	0.6%	91
10. Rustic Outposts	**1,895**	**2.0%**	**24**	**3,564**	**1.9%**	**23**
Southern Satellites (10A)	1,019	1.1%	34	1,844	1.0%	31
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	876	0.9%	80	1,720	0.9%	80
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
11. Midtown Singles	**9,253**	**9.7%**	**156**	**15,378**	**8.2%**	**150**
City Strivers (11A)	0	0.0%	0	0	0.0%	0
Young and Restless (11B)	3,753	3.9%	229	6,007	3.2%	234
Metro Fusion (11C)	1,042	1.1%	77	1,634	0.9%	67
Set to Impress (11D)	2,667	2.8%	200	4,661	2.5%	209
City Commons (11E)	1,791	1.9%	208	3,076	1.6%	203
12. Hometown	**14,393**	**15.0%**	**240**	**27,343**	**14.6%**	**247**
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Traditional Living (12B)	12,282	12.8%	656	23,399	12.5%	687
Small Town Simplicity (12C)	1,142	1.2%	63	2,179	1.2%	68
Modest Income Homes (12D)	969	1.0%	76	1,765	0.9%	73
13. Next Wave	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
International Marketplace	0	0.0%	0	0	0.0%	0
Las Casas (13B)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	0	0.0%	0	0	0.0%	0
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
14. Scholars and Patriots	**13,693**	**14.3%**	**893**	**31,999**	**17.1%**	**748**
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
College Towns (14B)	8,671	9.1%	960	16,800	9.0%	873
Dorms to Diplomas (14C)	5,022	5.2%	1,035	15,199	8.1%	824
Unclassified (15)	0	0.0%	0	161	0.1%	39

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.
Source: Esri

Downtown Kalamazoo, Michigan Retail Market Study
Gibbs Planning Group, Inc.
25 May 2017

APPENDIX EXHIBIT E5: Tapestry Segmentation Area Profile

Tapestry Segmentation Area Profile

PTA
Area: 308.4 square miles

Prepared by Gibbs Planning Group

Tapestry Urbanization	2016 Households			2016 Adult Population		
	Number	**Percent**	**Index**	**Number**	**Percent**	**Index**
Total:	95,701	100.0%		186,836	100.0%	
1. Principal Urban Center	**0**	**0.0%**	**0**	**0**	**0.0%**	**0**
Laptops and Lattes (3A)	0	0.0%	0	0	0.0%	0
Metro Renters (3B)	0	0.0%	0	0	0.0%	0
Trendsetters (3C)	0	0.0%	0	0	0.0%	0
Downtown Melting Pot (8D)	0	0.0%	0	0	0.0%	0
City Strivers (11A)	0	0.0%	0	0	0.0%	0
NeWest Residents (13C)	0	0.0%	0	0	0.0%	0
Fresh Ambitions (13D)	0	0.0%	0	0	0.0%	0
High Rise Renters (13E)	0	0.0%	0	0	0.0%	0
2. Urban Periphery	**11,473**	**12.0%**	**71**	**21,223**	**11.4%**	**63**
Pacific Heights (2C)	0	0.0%	0	0	0.0%	0
Rustbelt Traditions (5D)	7,018	7.3%	330	13,356	7.1%	342
Urban Villages (7B)	0	0.0%	0	0	0.0%	0
American Dreamers (7C)	0	0.0%	0	0	0.0%	0
Barrios Urbanos (7D)	0	0.0%	0	0	0.0%	0
Southwestern Families (7F)	0	0.0%	0	0	0.0%	0
City Lights (8A)	0	0.0%	0	0	0.0%	0
Bright Young Professionals	2,444	2.6%	115	4,468	2.4%	119
Metro Fusion (11C)	1,042	1.1%	77	1,634	0.9%	67
Family Foundations (12A)	0	0.0%	0	0	0.0%	0
Modest Income Homes (12D)	969	1.0%	76	1,765	0.9%	73
International Marketplace	0	0.0%	0	0	0.0%	0
Las Casas (13B)	0	0.0%	0	0	0.0%	0
3. Metro Cities	**51,585**	**53.9%**	**295**	**99,607**	**53.3%**	**314**
In Style (5B)	4,310	4.5%	200	7,769	4.2%	198
Emerald City (8B)	648	0.7%	48	1,053	0.6%	46
Front Porches (8E)	0	0.0%	0	0	0.0%	0
Old and Newcomers (8F)	5,019	5.2%	226	8,397	4.5%	223
Hardscrabble Road (8G)	2,807	2.9%	238	5,750	3.1%	261
Retirement Communities (9E)	3,812	4.0%	328	6,356	3.4%	334
Social Security Set (9F)	803	0.8%	104	1,140	0.6%	91
Young and Restless (11B)	3,753	3.9%	229	6,007	3.2%	234
Set to Impress (11D)	2,667	2.8%	200	4,661	2.5%	209
City Commons (11E)	1,791	1.9%	208	3,076	1.6%	203
Traditional Living (12B)	12,282	12.8%	656	23,399	12.5%	687
College Towns (14B)	8,671	9.1%	960	16,800	9.0%	873
Dorms to Diplomas (14C)	5,022	5.2%	1,035	15,199	8.1%	824

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Gibbs Planning Group

Tapestry Segmentation Area Profile

PTA
Area: 308.4 square miles

Prepared by Gibbs Planning Group

Tapestry Urbanization	2016 Households			2016 Adult Population		
	Number	**Percent**	**Index**	**Number**	**Percent**	**Index**
Total:	95,701	100.0%		186,836	100.0%	
4. Suburban Periphery	**10,287**	**10.7%**	**34**	**20,962**	**11.2%**	**35**
Top Tier (1A)	0	0.0%	0	0	0.0%	0
Professional Pride (1B)	990	1.0%	64	2,217	1.2%	67
Boomburbs (1C)	0	0.0%	0	0	0.0%	0
Savvy Suburbanites (1D)	1,464	1.5%	51	3,170	1.7%	53
Exurbanites (1E)	1,856	1.9%	100	3,709	2.0%	102
Urban Chic (2A)	0	0.0%	0	0	0.0%	0
Pleasantville (2B)	0	0.0%	0	0	0.0%	0
Enterprising Professionals (2D)	0	0.0%	0	0	0.0%	0
Soccer Moms (4A)	1,156	1.2%	42	2,474	1.3%	44
Home Improvement (4B)	0	0.0%	0	0	0.0%	0
Comfortable Empty Nesters	2,880	3.0%	122	5,626	3.0%	122
Parks and Rec (5C)	0	0.0%	0	0	0.0%	0
Midlife Constants (5E)	1,941	2.0%	81	3,766	2.0%	85
Up and Coming Families (7A)	0	0.0%	0	0	0.0%	0
Silver & Gold (9A)	0	0.0%	0	0	0.0%	0
Golden Years (9B)	0	0.0%	0	0	0.0%	0
The Elders (9C)	0	0.0%	0	0	0.0%	0
Military Proximity (14A)	0	0.0%	0	0	0.0%	0
5. Semirural	**6,742**	**7.0%**	**75**	**12,886**	**6.9%**	**76**
Middleburg (4C)	3,895	4.1%	144	7,438	4.0%	141
Heartland Communities (6F)	829	0.9%	37	1,549	0.8%	38
Valley Growers (7E)	0	0.0%	0	0	0.0%	0
Senior Escapes (9D)	0	0.0%	0	0	0.0%	0
Down the Road (10D)	876	0.9%	80	1,720	0.9%	80
Small Town Simplicity (12C)	1,142	1.2%	63	2,179	1.2%	68
6. Rural	**15,614**	**16.3%**	**96**	**31,997**	**17.1%**	**101**
Green Acres (6A)	10,370	10.8%	339	21,371	11.4%	347
Salt of the Earth (6B)	4,225	4.4%	152	8,782	4.7%	161
The Great Outdoors (6C)	0	0.0%	0	0	0.0%	0
Prairie Living (6D)	0	0.0%	0	0	0.0%	0
Rural Resort Dwellers (6E)	0	0.0%	0	0	0.0%	0
Southern Satellites (10A)	1,019	1.1%	34	1,844	1.0%	31
Rooted Rural (10B)	0	0.0%	0	0	0.0%	0
Diners & Miners (10C)	0	0.0%	0	0	0%	0
Rural Bypasses (10E)	0	0.0%	0	0	0.0%	0
Unclassified (15)	0	0.0%	0	161	0.1%	39

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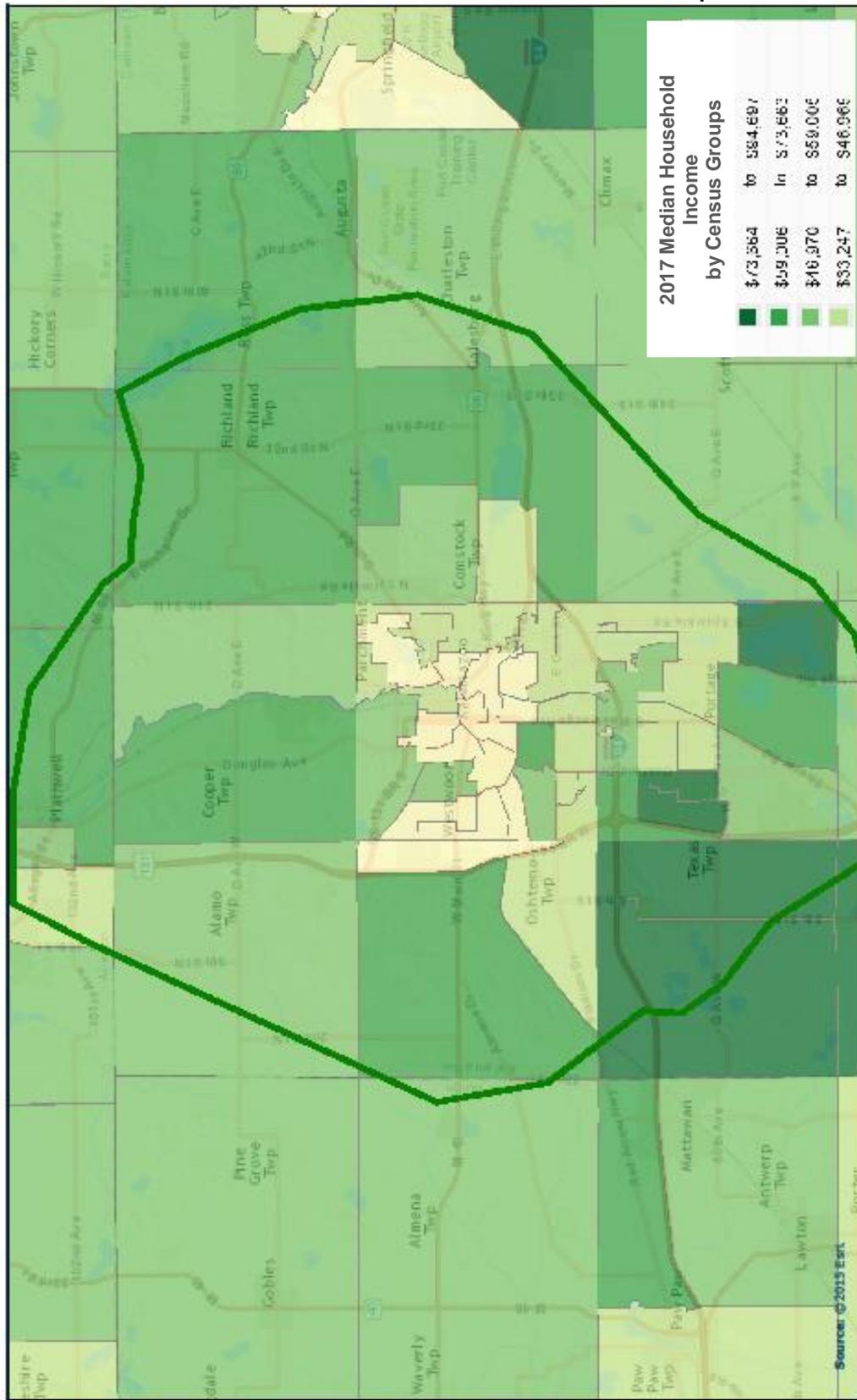**Source:** Esri

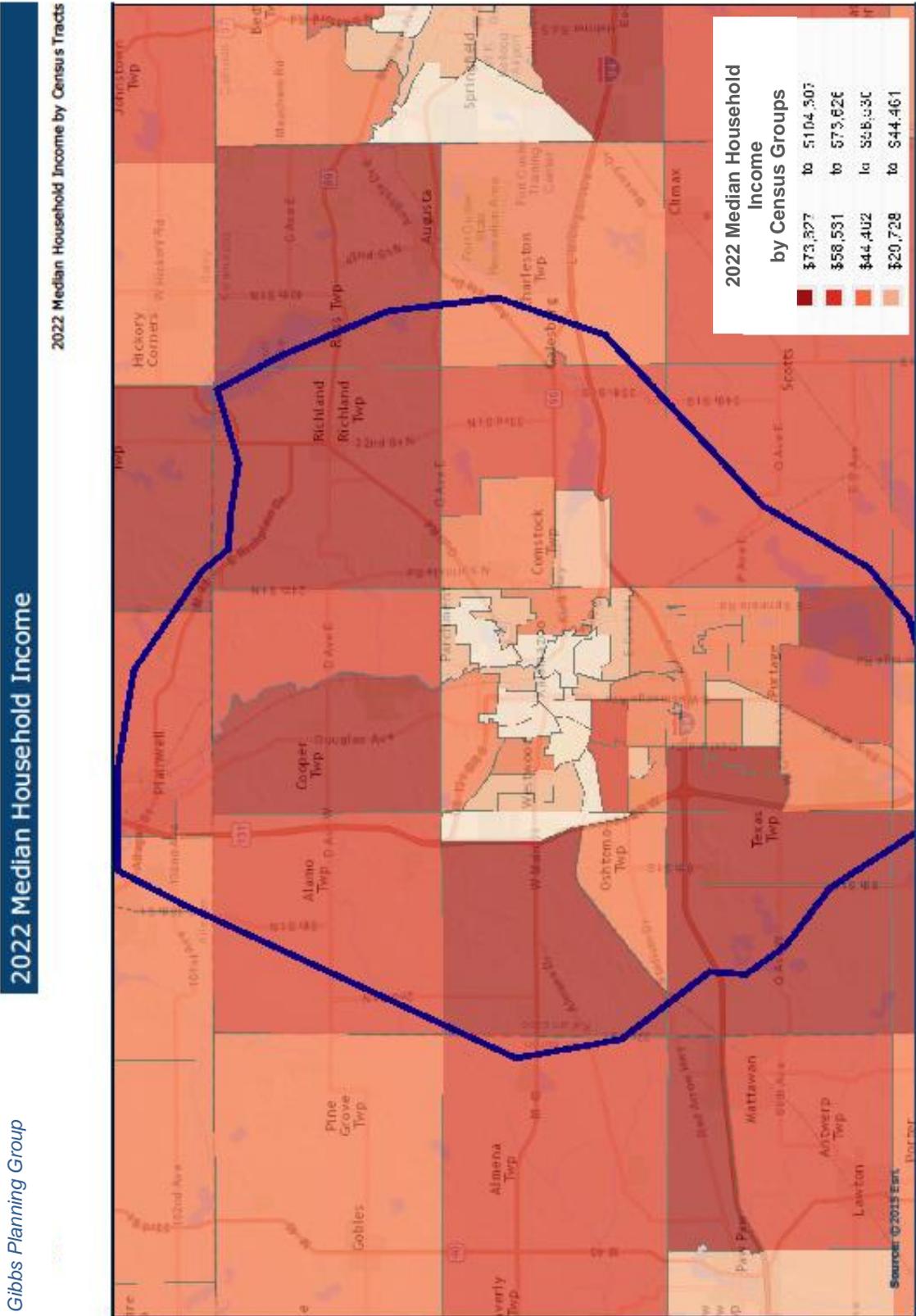# APPENDIX EXHIBIT F: 2017-2022 Annual Population Growth Rate Map
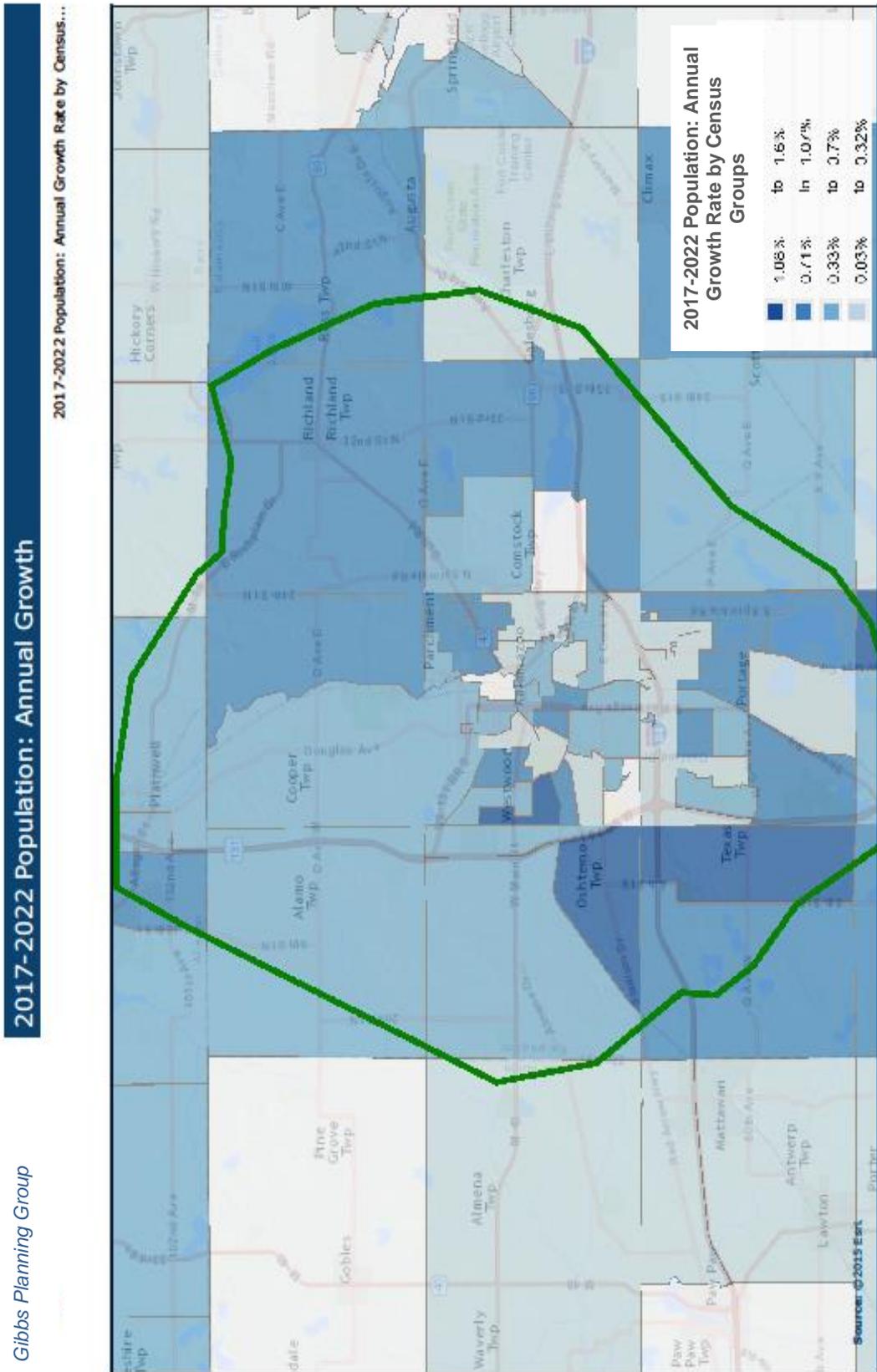
2017 Median Household Income by Census Tracts

2017 Median Household Income

Gibbs Planning Group

2017 Median Household Income by Census Groups

$73,564 to $84,697	
$59,006 to $73,663	
$46,970 to $59,005	
$33,247 to $46,969	

APPENDIX EXHIBIT H: 2022 Median Household Income Map

APPENDIX EXHIBIT H: 2022 Average Household Income Map

2022 Average Household Income by Census Tracts

2022 Average Household Income

2022 Average Household Income

■	$117,093	to	$136,395	
■	$92,331	to	$117,052	
■	$72,212	to	$92,930	
■	$53,307	to	$72,211	

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APPENDIX EXHIBIT I: 2017 Total Employees

APPENDIX EXHIBIT J: 2017 Bachelor's Degrees

2017 Education: Bachelor's Degree

2017 Education: Bachelor's Degree by Census Tracts

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2017 Bachelor's Degree by Census Groups

1,333	to 1,878
599	to 1,332
388	to 598
305	to 587

Source: ©2015 Esri

APPENDIX EXHIBIT K: CoStar

Availability	Survey	5-Year Avg
NNN Rent Per SF	$10.94	$11.12
Vacancy Rate	14.0%	15.3%
Vacant SF	223,078	244,467
Availability Rate	26.3%	20.8%
Available SF	425,433	332,767
Sublet SF	10,800	4,766
Months on Market	11.9	25.5

Inventory	Survey	5-Year Avg
Existing Buildings	66	66
Existing SF	1,597,151	1,595,651
12 Mo. Const. Starts	17,800	6,560
Under Construction	17,800	2,890
12 Mo. Deliveries	0	3,333

Demand	Survey	5-Year Avg
12 Mo. Absorption SF	-37,614	29,008
12 Mo. Leasing SF	40,834	53,131

Sales	Past Year	5-Year Avg
Sale Price Per SF	$63	$40
Asking Price Per SF	$107	$74
Sales Volume (Mil.)	$1.1	$1.6
Cap Rate	-	8.5%

Vacancy Rate

NNN Asking Rent Per SF

Net Absorption