Market Analysis

The City of Roseville
Macomb County, Michigan
2018

Prepared by:

LandUseUSA
UrbanStrategies

Detroit Metro Prosperity Region 10
The Michigan Economic
Development Corporation
Redevelopment Ready Sites ®

redevelopment ready
communities

The Michigan Economic Development Corporation, Talent Investment Agency, and Michigan Municipal League have dedicated assets and time in engaging numerous communities across the state, and empowering them to shape their future and maximize economic potential through the Redevelopment Ready Communities ® and Redevelopment Ready Sites ® initiatives. This includes helping RRC-certified communities learn the market analysis, visioning, and planning process that will help substantiate projects and generate interest from developers and investors. The process is supported by stakeholder engagement in workshops, with a focus on site-specific projects and development opportunities. This document presents a Market Analysis for the *City of Roseville*, and has been designed to support the team effort.

Acknowledgements

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1. Redevelopment Ready Community ® – The City of Roseville earned acclaim as being the first city certified by the MEDC's Redevelopment Ready Communities ® program in 2014. Since then, they have streamlined its permitting and review process for new projects; created a downtown development authority to focus on Utica Junction; and is actively promoting reinvestment along Gratiot Avenue (plus three other corridors).
2. Iconic Utica Junction – The subject site is located within the City of Roseville's Downtown Development Authority (DDA) Tax Increment Financing (TIF) established in 2016. It is also part of a planning overlay district. The city is now using a combination of public funds and grants to make significant improvements to its DDA, with a focus on infrastructure, streetscape, and pedestrian amenities. Work on these improvements has already commenced (in 2017) and is expected to continue through 2020.
3. Creating a Community Destination – The subject site is a clean slate and opportunity to redesign Utica Road with a community and cultural vision in mind. It also presents a competitive "first in" and unique advantage, because there are not many downtowns like this in Macomb County. Once developed, it could help connect local businesses and create an attractive environment.
4. Preliminary Site Planning – For the subject site, several iterations of block diagrams and renderings were provided by Peter Allen in 2013 and 2014, and on behalf of the MEDC. Note: In 2017, an award-winning design was also created for a public "Pavilion @ Utica Junction" at the north end of the site.
5. Redevelopment Ready Progress - The city has purchased a building fronting along Gratiot Avenue and along the northeast boundary of the site. It demolished the building to create a pedestrian pass-through for access to future development of the subject site. This clearly demonstrates the city's progressiveness and willingness to do whatever it takes to bring the project to fruition and help make it a success.
6. Implemented Utica Road Diet – Utica Road (from Gratiot Avenue northwest to 12 Mile Road) has undergone a road diet that reduced the number of lanes from four down to three; and reduced traffic speed from 45 down to 35 miles per hour. In addition, the left turn lane ("ramp") from northbound Gratiot Avenue has been reduced from two lanes down to one. In the best of all worlds, this will help create a walkable, pedestrian environment for the subject site; and slow traffic down so it is more likely to turn into parking spaces and lots.
7. Buffered from Traffic –The subject site is located along Utica Road, which is a secondary, perpendicular, side road to Gratiot Avenue. The site is in a relatively quiet area that is buffered from the congestion, traffic noise, and high speeds. Therefore, it is an ideal setting for an outdoor pavilion, café tables along the sidewalk, and/or patio seating behind a restaurant.
8. Branding and Marketing – Although the district is sometimes referred to as the "Town Center", the name "Utica Junction" is preferred because it conveys an authentic and unique place with history and culture. This unique identity can also be leveraged for cross-marketing – such as the DDA-sponsored *Jammin' at the Junction* car & bike show, and similar events.

9. Overall Retail Market Strength – Based on results from a preliminary market share analysis, and supported by field observations, it is evident that the retail climate in Roseville is healthy and conducive to future growth. Local resident expenditures are high; there is considerable import from beyond the primary trade area; and sales per establishment are exceeding statewide and regional averages.
10. Quality Merchants and Tenants – The established mix of retail merchants in Utica Junction is healthy and will help attract additional merchants when new space is developed or existing spaces become available. Existing merchants include a boot shop, bike depot, fish & seafood market, winery, clock shop, art studio, collectibles, restaurants, bakery, automotive supply, oak furniture, and barber shop (additional field work will be completed to determine whether these are all still open).
11. Retail Wants and Preferences – The DDA plan identifies a number of merchants that the city would like to target as future businesses, including restaurants, a micro-brewery, garden shop, wine & cheese shop, bakery, music store, bicycle rentals, etc. All are considered good candidates for the subject site.
12. Regional Transit – The city has been proactive in promoting a northern extension of the regional transit authority's service of Roseville and neighboring jurisdictions along Gratiot Avenue. An expansion of the line north to a new Bus Rapid Transit (BRT) station in Utica Junction would help draw commuters and pedestrians into the district. This in turn could help generate more shopper activity and restaurant patrons.
13. Restaurant Cluster – There are about 10 eating and drinking establishments within one-half (1/2) mile of the subject site. This creates a clustering effect that could be leveraged by additional choices. Development of the site will eliminate surface parking that currently fragments the retail and shopping environment.
14. Eyes on the Street – Once completed, the project could help bring pedestrian and shopper traffic along Utica Road. This activity can help improve perceptions of safety for prospective residents and could generate renewed interest in the development of lofts and other housing formats within the district.
15. Trickle-Through Economics – If the site is planned and built with a smart design, then it has the potential to attract quality tenants. In turn, quality tenants will generate good rents and property revenues. Trickle-through benefits could include improved rents and revenues for the entire district, supported by lower turn-over and higher occupancy rates.
16. Catalyzing Additional Reinvestment – As another trickle-through benefit, if the subject site is redeveloped, it could also help catalyze additional reinvestment along the west side of Utica Road, creating a more balanced scale for both sides of the street.
17. The MEDC has identified two parcels along the west side of Utica as another candidate for additional redevelopment. The adjoining sites collectively comprise about 1.9 acres, and include a former church at 28491 Utica Rd, the church's unused parking lot, and a used car dealer at 28675 Utica Road. The ideal scenario would be to relocate the church occupying the Roseville Theatre into this vacant church at 28491 Utica Rd. Then, the Roseville Theatre should be fully restored as a playhouse and community cultural center.

18. Reinvention of Macomb Mall – In 2013, the City of Roseville used incentives to help the declining Macomb Mall reinvent itself. With city support and bolstered by some state grants, the mall completed a $30 million remodel that resulted in a new mix of national chains and anchors. Roseville has modified the zoning ordinance to allow new outdoor development the mall, with potential for future residential units.
19. Macomb Mall Sales – There have been some reports that sales at Macomb Mall have doubled since its transformation. These types of success stories provide valuable evidence of market support for smaller businesses and independent merchants in Utica Junction and along Gratiot Avenue.
20. 2019 Update of Master Plan – The city has a 2010 Master Plan supported by a 2007 community survey; plus a 2009 Gratiot Avenue Access Management Plan. The city is now preparing to undertake an update to the Master Plan in 2019. This will present a new opportunity to formulate an action-oriented strategy for the Utica Junction overlay district, DDA district, and commercial corridors. The city is also in the preliminary stages of working on a draft form-based code (FBC) for the DDA district.

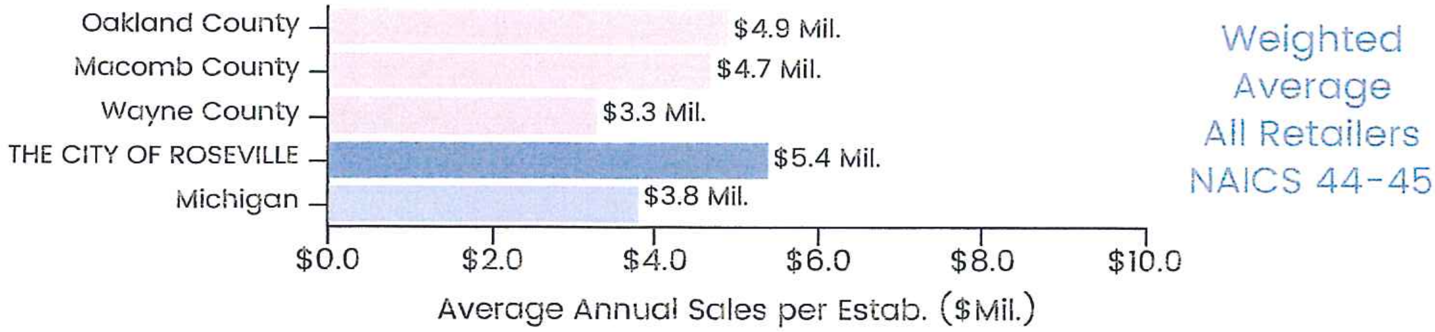
1. Site Limitations – The subject site was previously developed land, but is now vacant, free of any structures, and assumed to be clean and ready-to-build. Even so, there are several site limitations that will be noted by prospective investors or build-to-suit retail anchors. Mainly, the site is located mid-block rather than an intersection. It is relatively small with just 0.73 acres.
2. Land Use Adjacencies – The adjacent site to the north is currently occupied by an American Legion with a small commercial building and surface parking. Finding a new home for American Legion would open additional opportunities for reinvestment into the district, and would enable development of a larger and more impactful project.
3. Speedy Traffic, Challenged Walkability – Traffic along Gratiot Avenue and Utica Road is "speedy", and appears to be too fast for pedestrian comfort. This environment does not have bicycle lanes, and there is a need to add pedestrian cross-walks along Utica Road, and perhaps improve cross-walks along Gratiot Avenue.
4. Over-selling the Traffic Volumes – Utica Junction is located within 20 minutes from most other destinations in Macomb County. Gratiot Avenue has high traffic volumes near Utica Junction (approaching 70,000 vehicles daily) that could be converted into shoppers and restaurant patrons. However, traffic volumes along Utica Road are significantly less, and reported to be fewer than 10,000 vehicles daily.
5. Reduced Traffic Volumes – The recently completed road diet along Utica Road will help calm traffic, support a more pedestrian environment, and enable cars to pull into parking spaces and lots. However, from the perspective of some developers and retailer tenants, it could also be viewed as a negative, simply because it might reduce the total volume of vehicular traffic along Utica Road. This means fewer advertising exposures and traffic that could be converted into impulse shoppers and restaurant patrons.
6. Over-selling the Site Visibility – The site is not really visible to commuters driving south along Gratiot Avenue in the morning. For north-bound commuters returning home at the end of the day, visibility to the site is interrupted by south-bound traffic and the wide median along Gratiot Avenue. The site is on the wrong side of the road for north-bound commuters seeking dinner choices at the end of a long day, because they will need to queue-up and wait for a light change before turning west onto Utica Road.
7. Prevalence of Non-Conforming Uses – Three used car dealerships are located along Utica Road and between Gratiot Avenue and Tranquil Street; plus a fourth located near Twelve Mile Road. Other uses include automotive repair, parts, and supply shops. The dealerships are non-conforming uses, and the long-term plan is to transition to confirming uses that will support creation of a walkable district of retail and restaurants. This is an admirable goal that should be detailed in the Master Plan update – but it could take time.
8. Character of Commercial Corridor – Although retail trades are excelling in Roseville, it is led by a prevalence of big-box and national chain stores in freestanding locations, strip centers, and enclosed malls along Gratiot. For example, Walmart is located less than ½ mile north along Gratiot Avenue; and a vacant Kmart is located about one mile south. This vehicle-oriented environment can be challenging to offset with relatively small, incremental, infill projects. Note: The city has a vision for redeveloping Kmart into a mixed-use project, which could help catalyze additional reinvestment along the corridor.

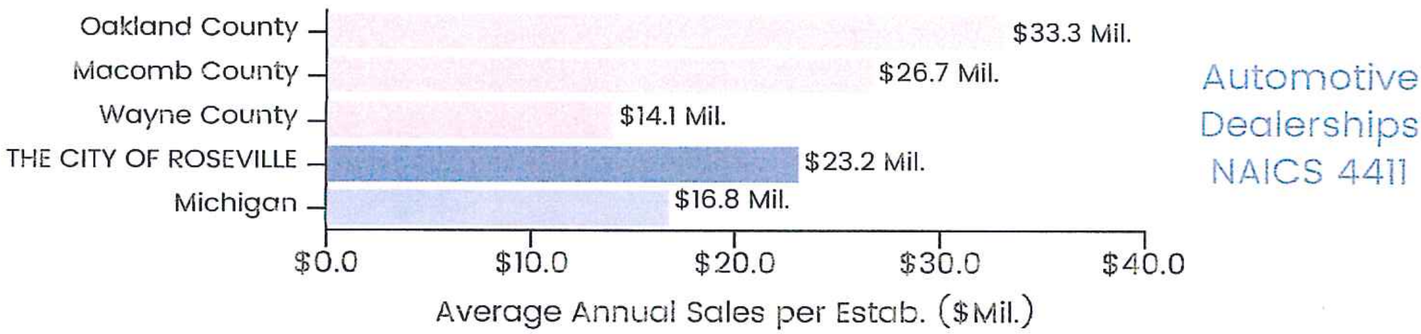
Section A

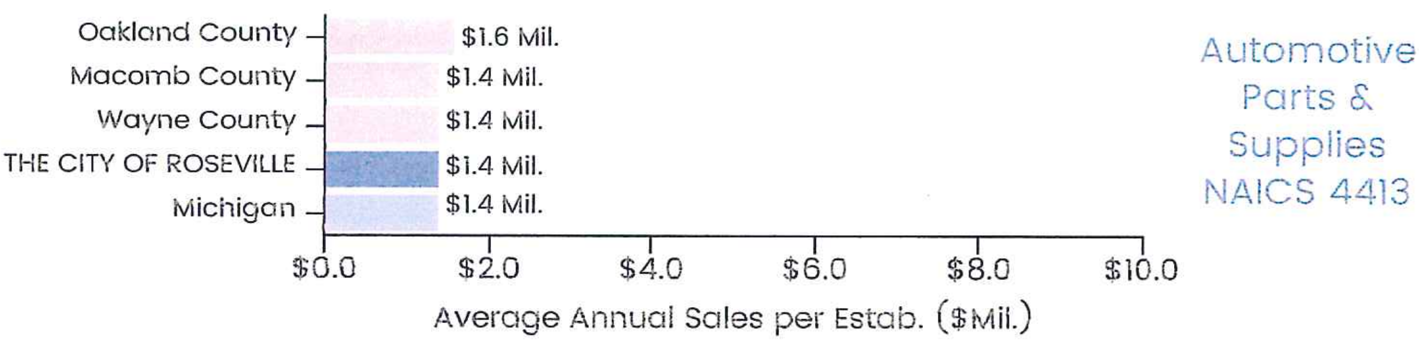
Retail Sales per Establishment

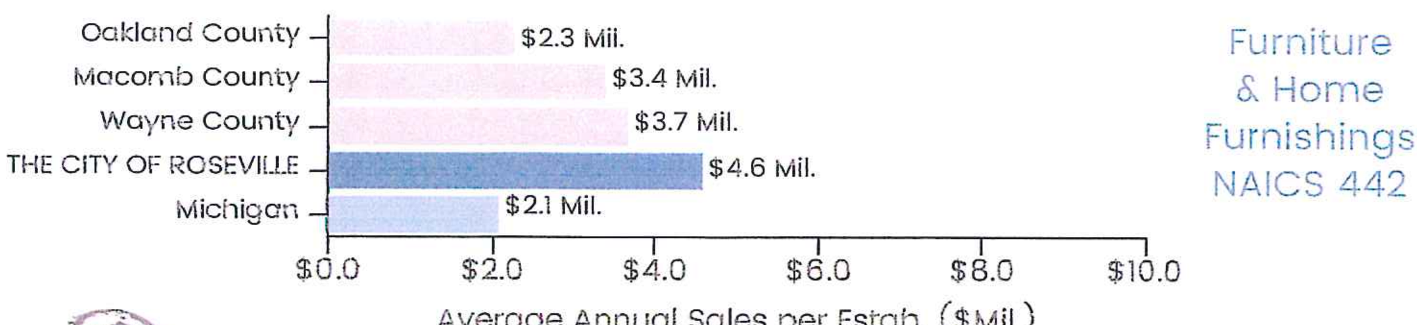
Annual Retail Sales | Roseville

A comparison of transacted retail sales per establishment, forecast to 2020.









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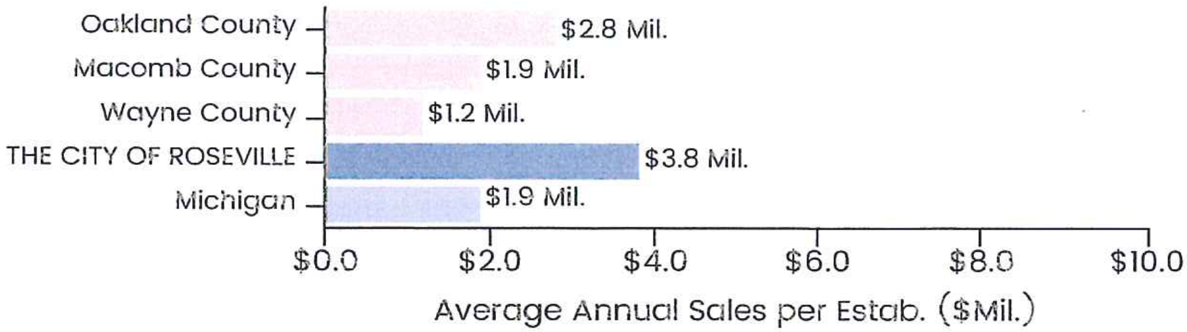
Source: Underlying data provided by the Economic Census with forecasts to 2020 by LandUseUSA ©. Analysis and exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Municipal League, 2018.

NAICS indicates the North American Industrial Classification System as established by the US Census.

Annual Retail Sales | Roseville

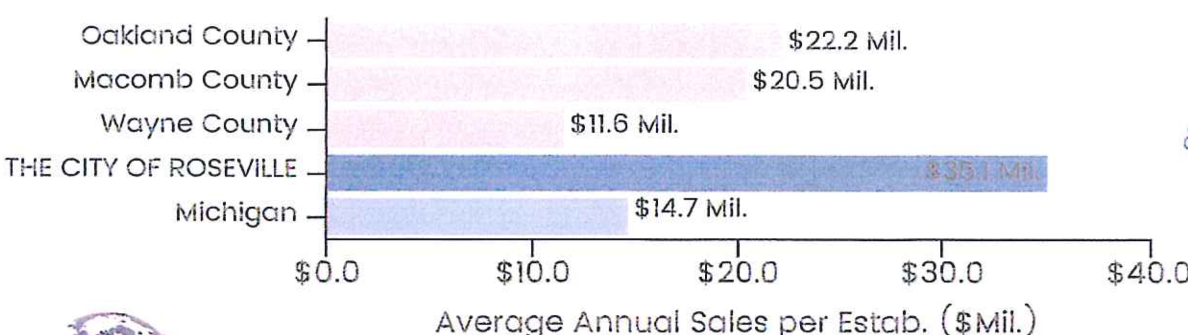
A comparison of transacted retail sales per establishment, forecast to 2020.



Electronics Appliances NAICS 443

Building Materials & Garden Supplies NAICS 444

Sporting Goods Hobby & Music NAICS 445



General Merchandise & Department Stores NAICS 442

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Annual Retail Sales | Roseville

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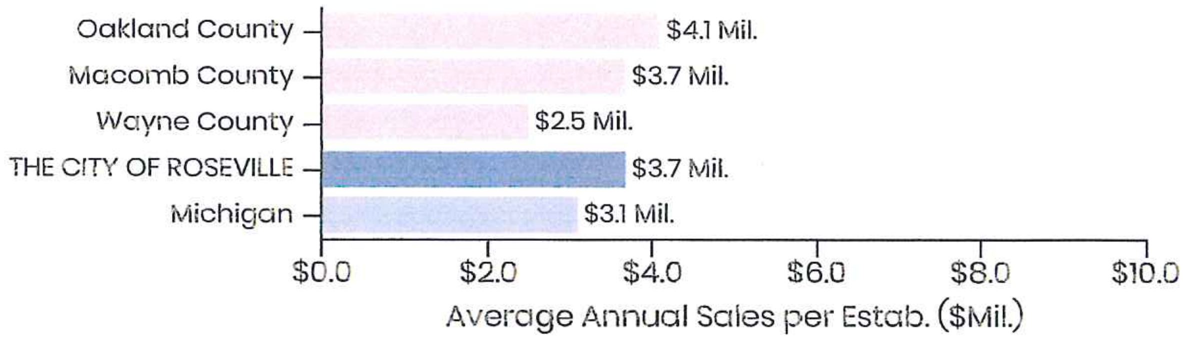
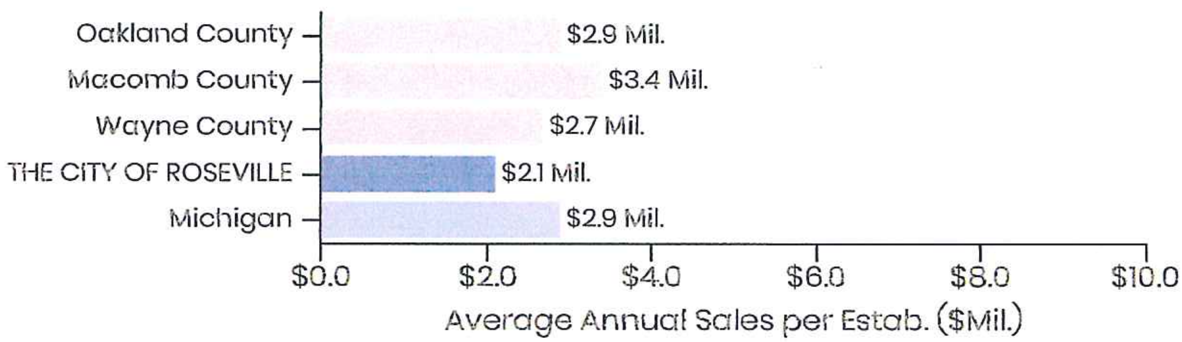
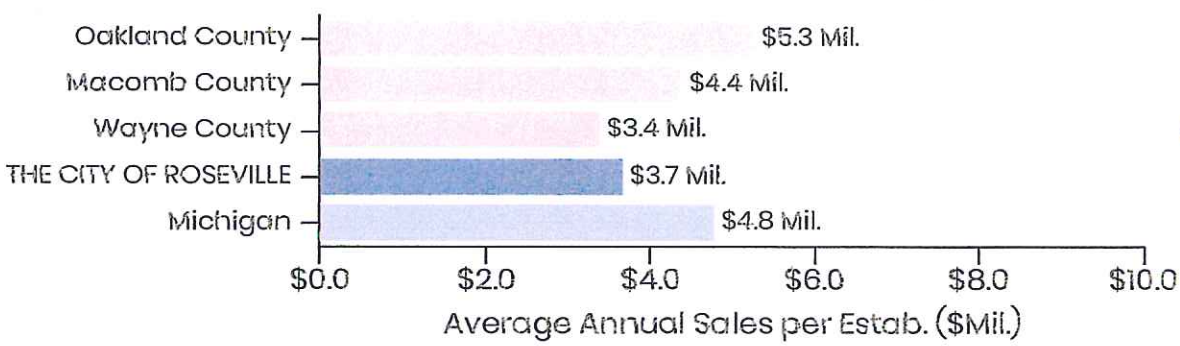


Food & Beverage Stores NAICS 445



Drug Stores Pharmacies NAICS 446



Gasoline Stations & Convenience Stores NAICS 447

Observations:
Observations:
Observations:

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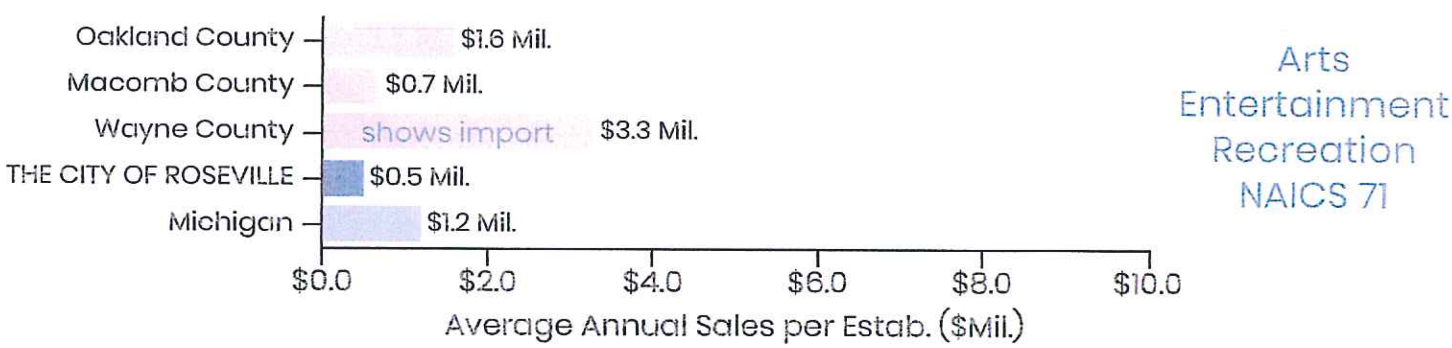
Accommodations & Arts | Roseville

A comparison of transacted retail sales per establishment, forecast to 2020.



Observations:
Observations:
Observations:

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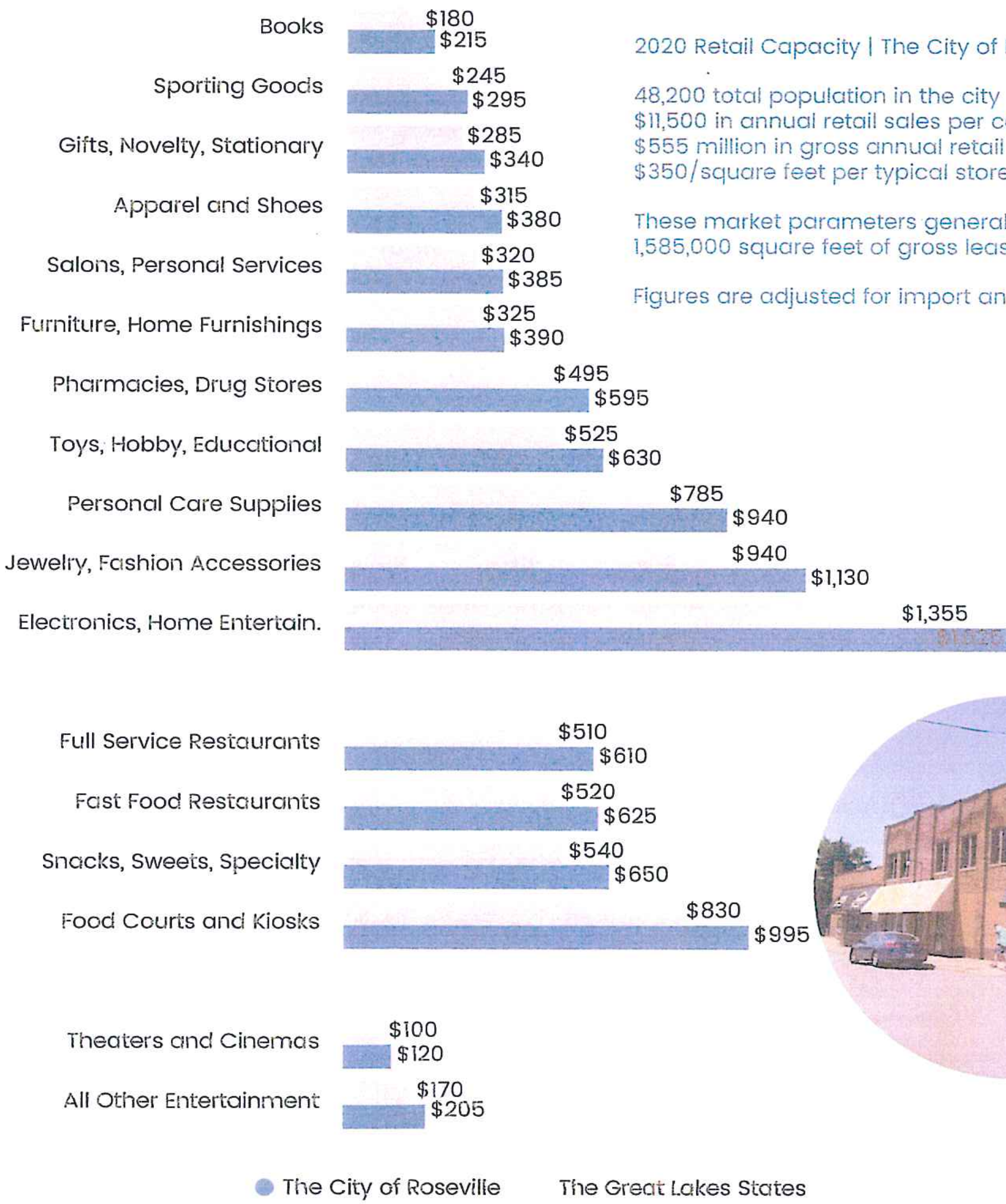
Sales per Square Foot | Roseville

Average sales per square foot by retail category, forecast to the year 2020.



2020 Retail Capacity | The City of Roseville

48,200 total population in the city
$11,500 in annual retail sales per capita
$555 million in gross annual retail sales
$350/square feet per typical store

These market parameters generally support 1,585,000 square feet of gross leasable area

Figures are adjusted for import and export.

Underlying data provided by the International Council of Shopping Centers through year-end 2017.
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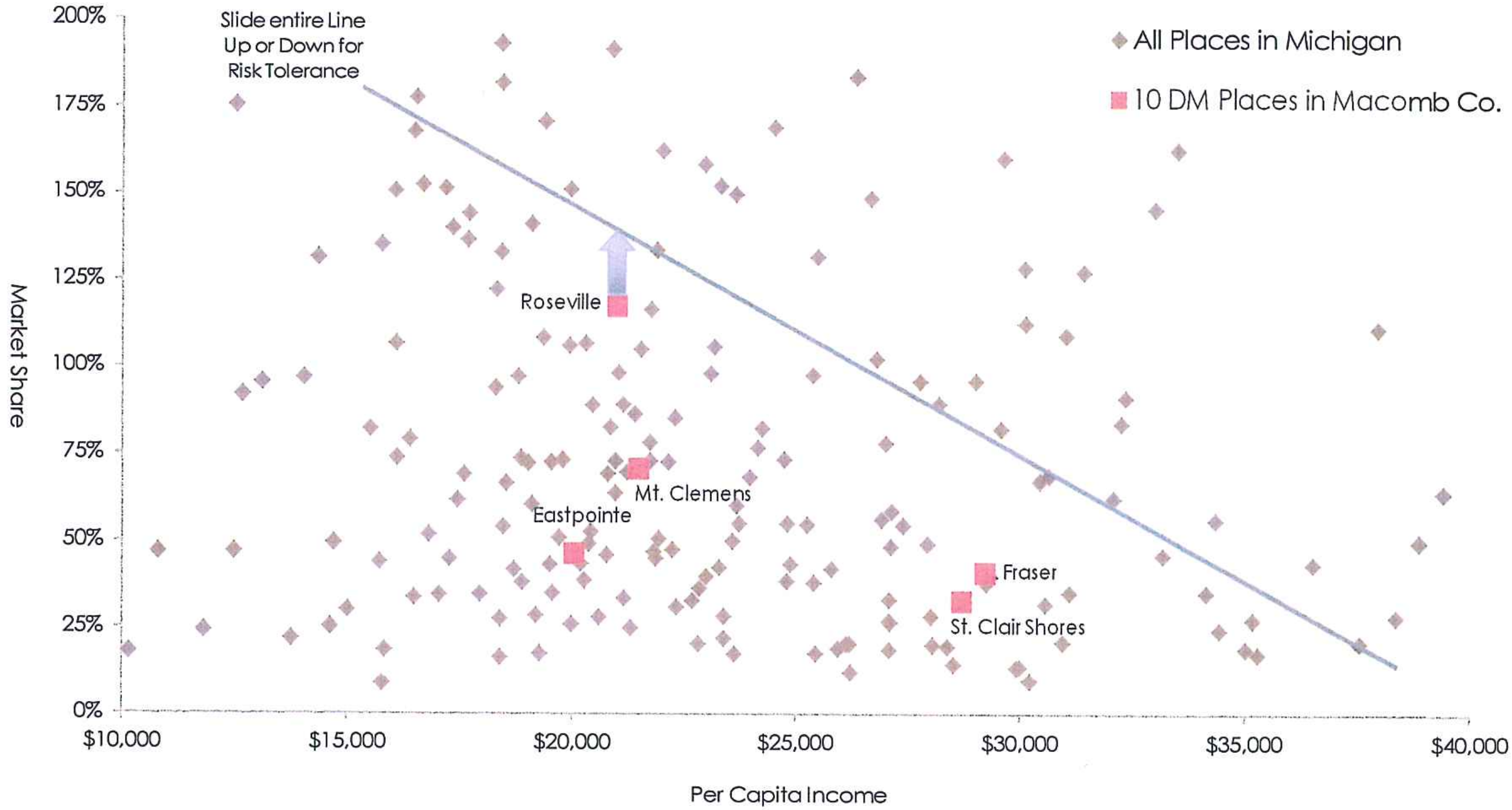
Section B

Retail Market Share Places

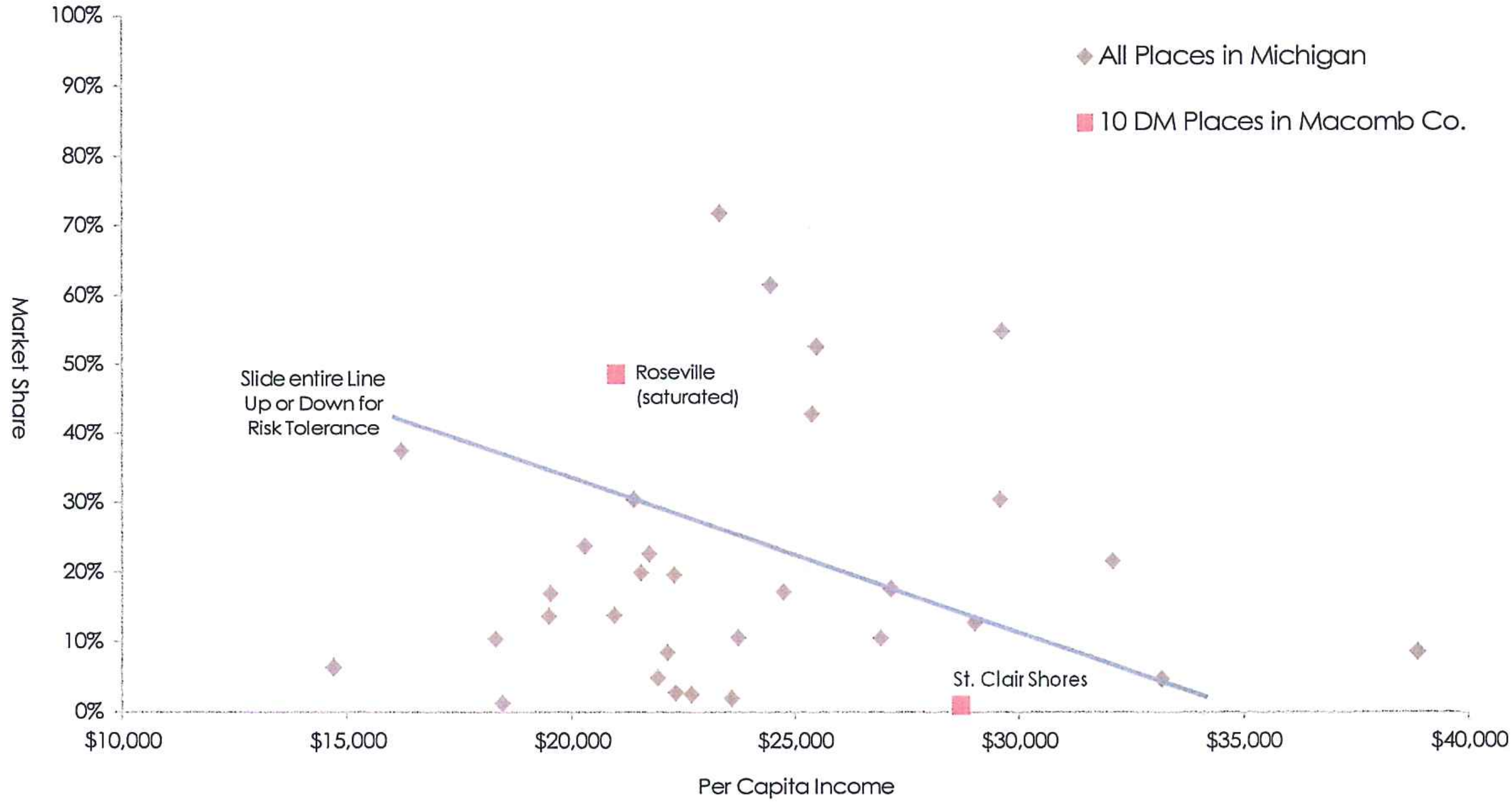
Market Share v. Per Capita Income
Total Retail Trade | NAICS 44-45
Selected Places in Michigan



Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.

Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2016 (5-yr) American Community Survey.

Market Share v. Per Capita Income
Department and Discount Dept. Stores | NAICS 452
Selected Places in Michigan



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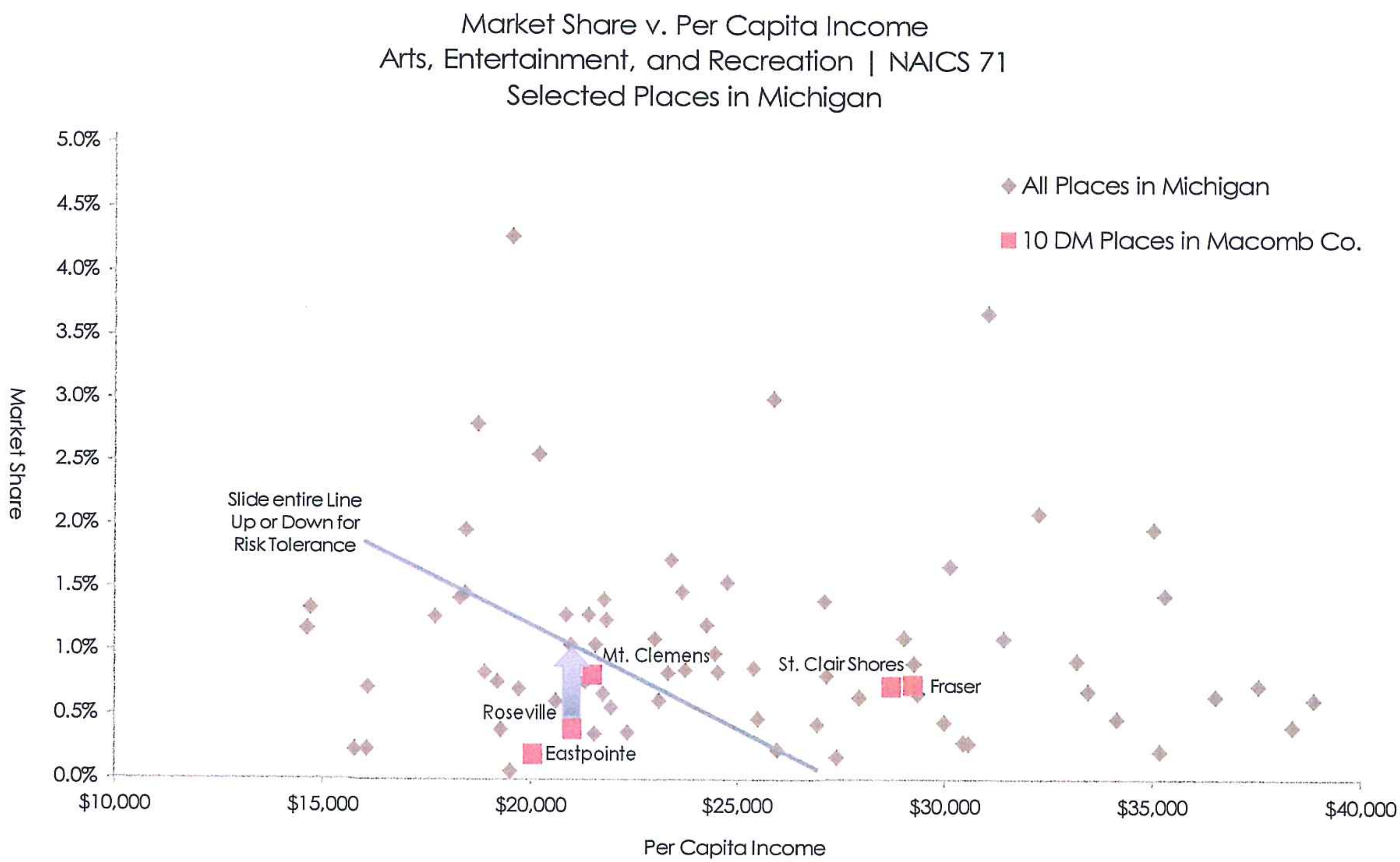
Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2016 (5-yr) American Community Survey.



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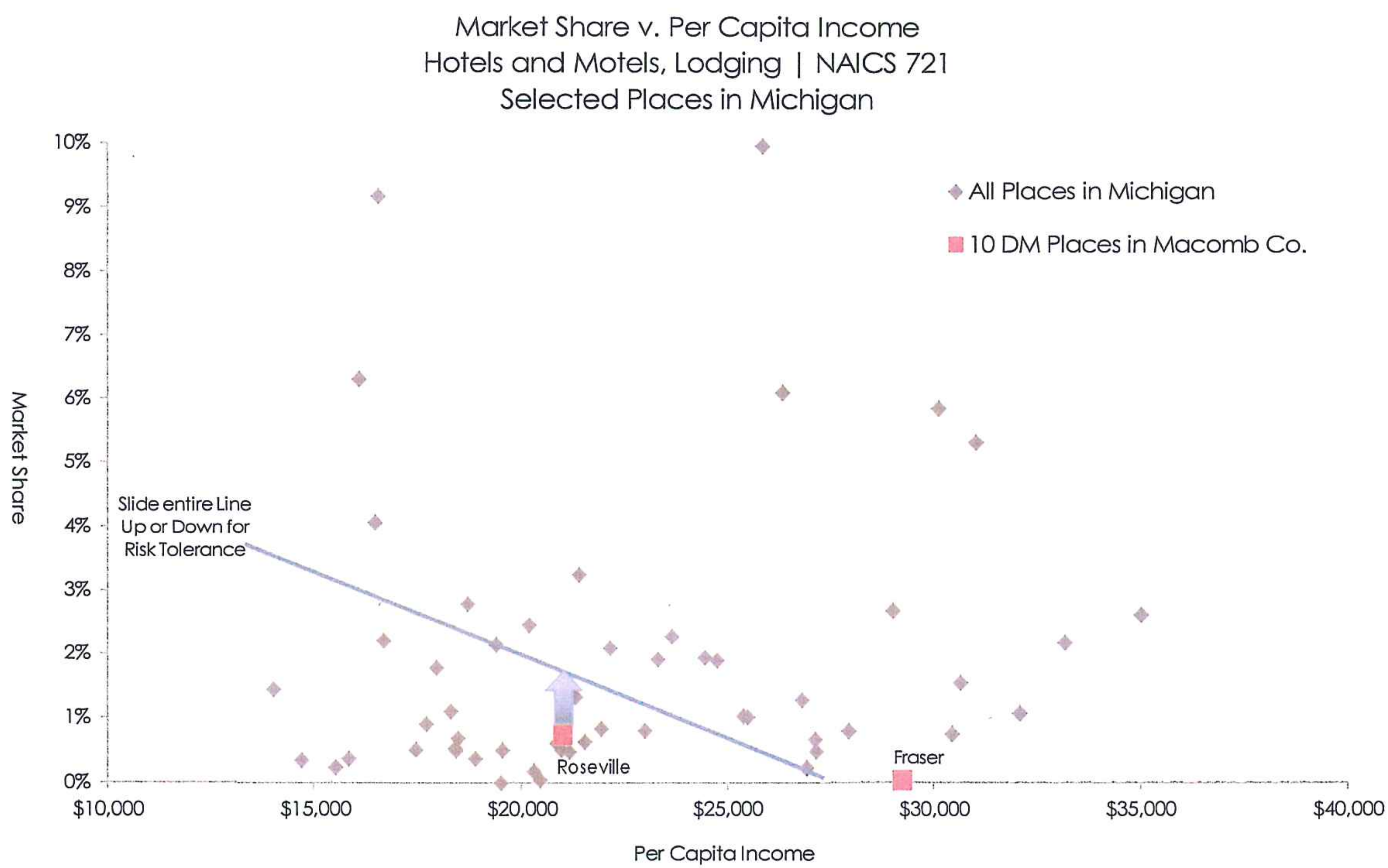


Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.

Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2016 (5-yr) American Community Survey.

Market Share v. Per Capita Income
Restaurants and Drinking Establishments | NAICS 722
Selected Places in Michigan

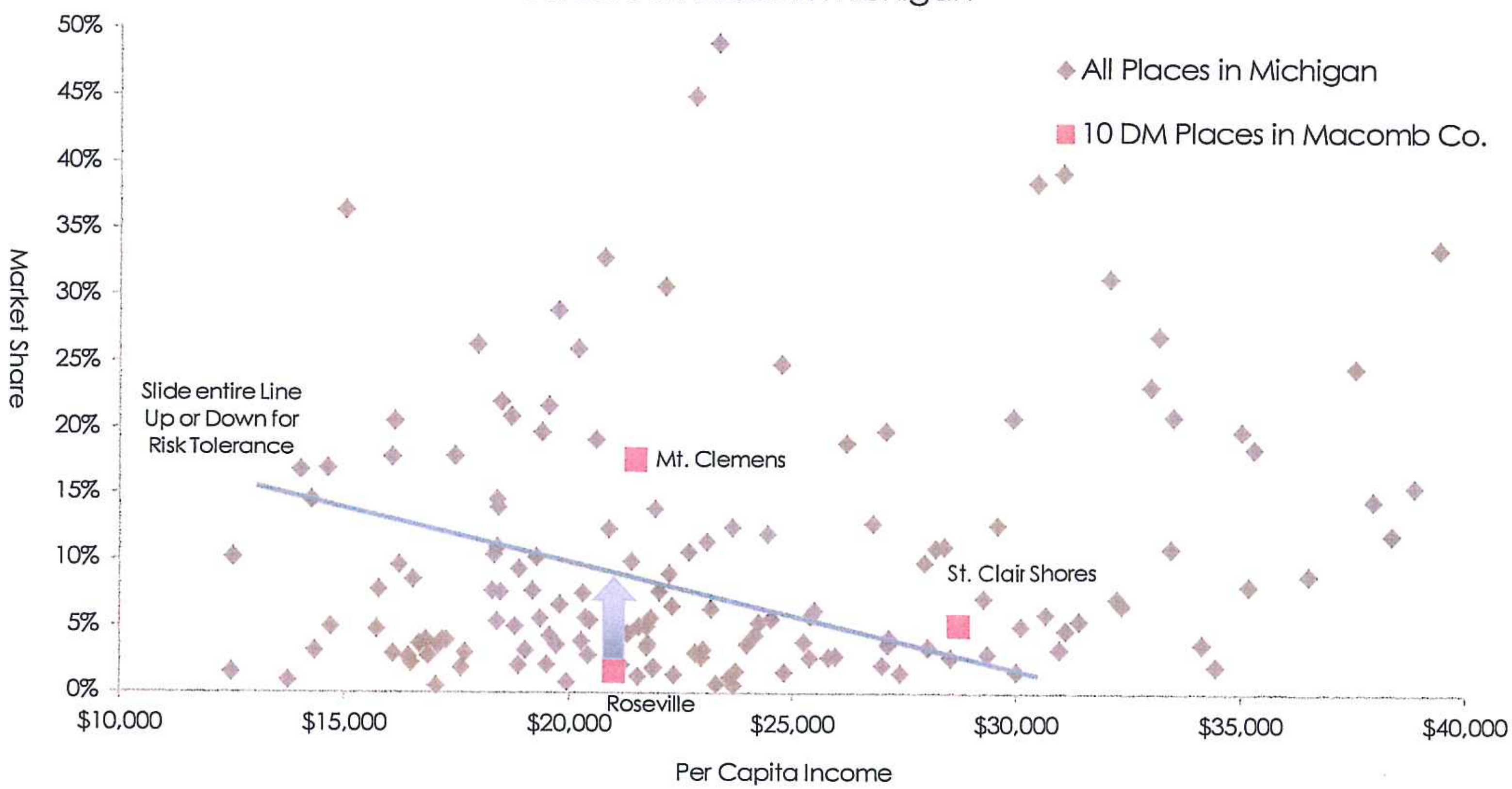
Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.

Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2016 (5-yr) American Community Survey.

Section D

Economic Analysis

Market Share v. Per Capita Income
Professional, Scientific, Technical Services | NAICS 54
Selected Places in Michigan



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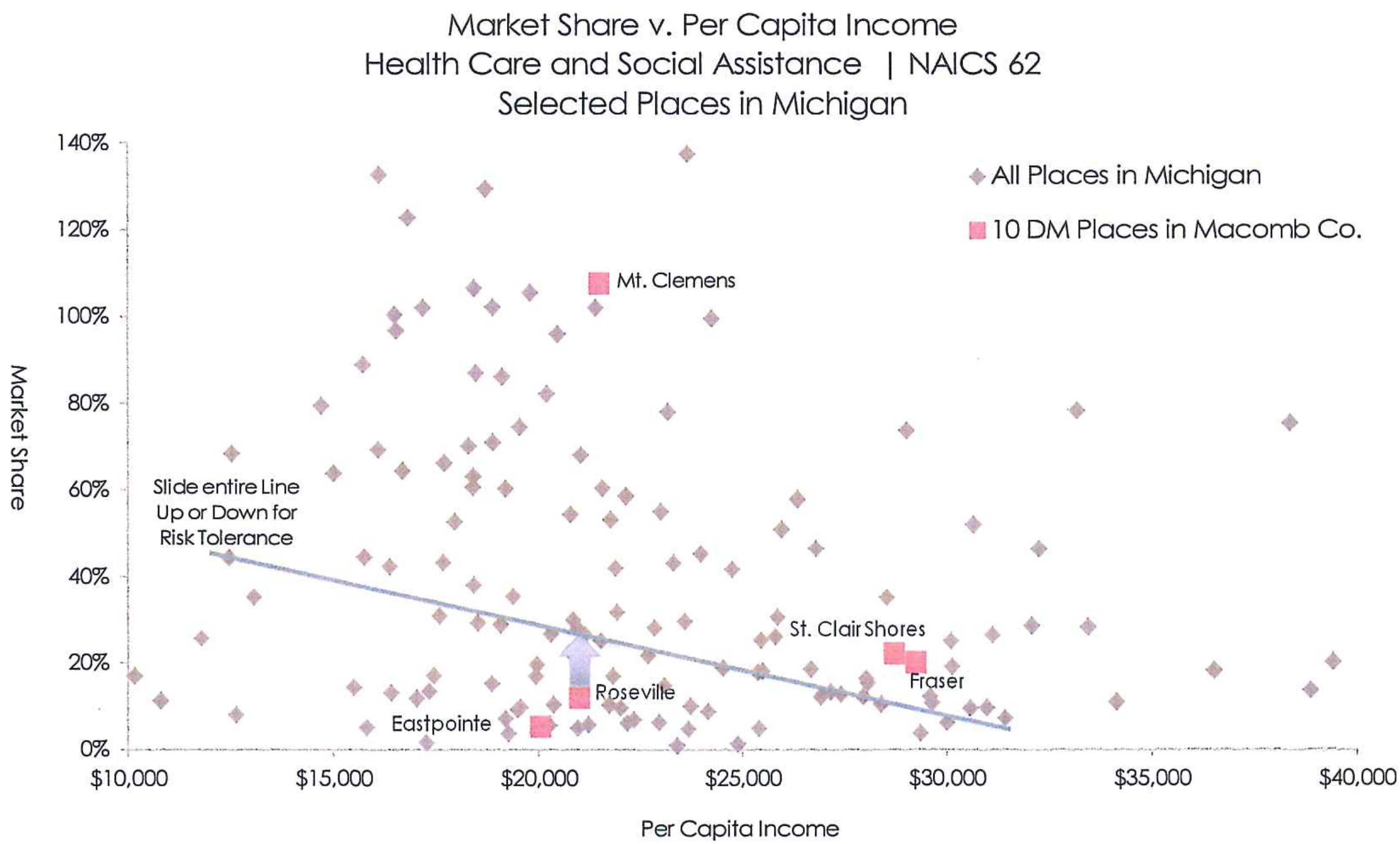

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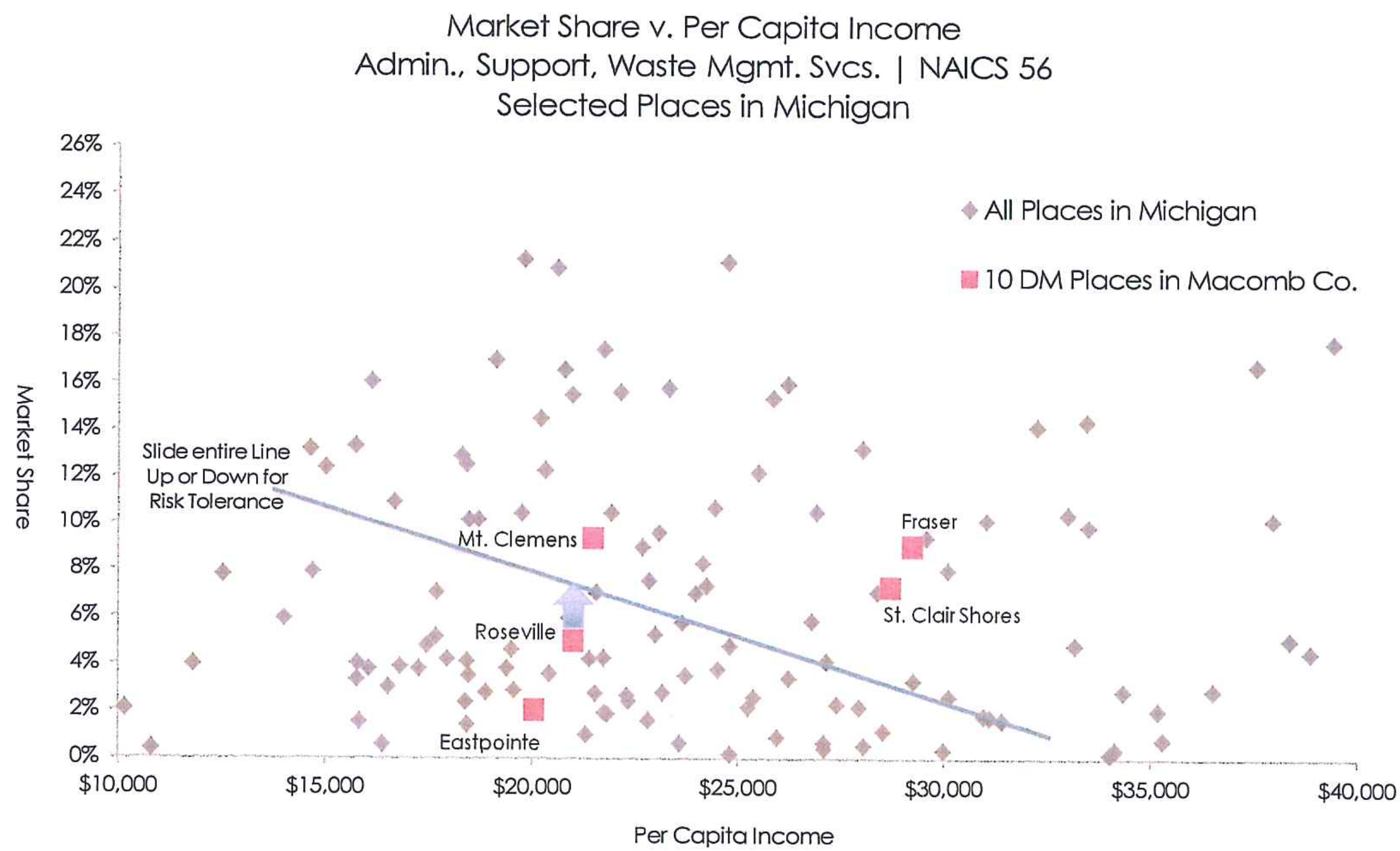

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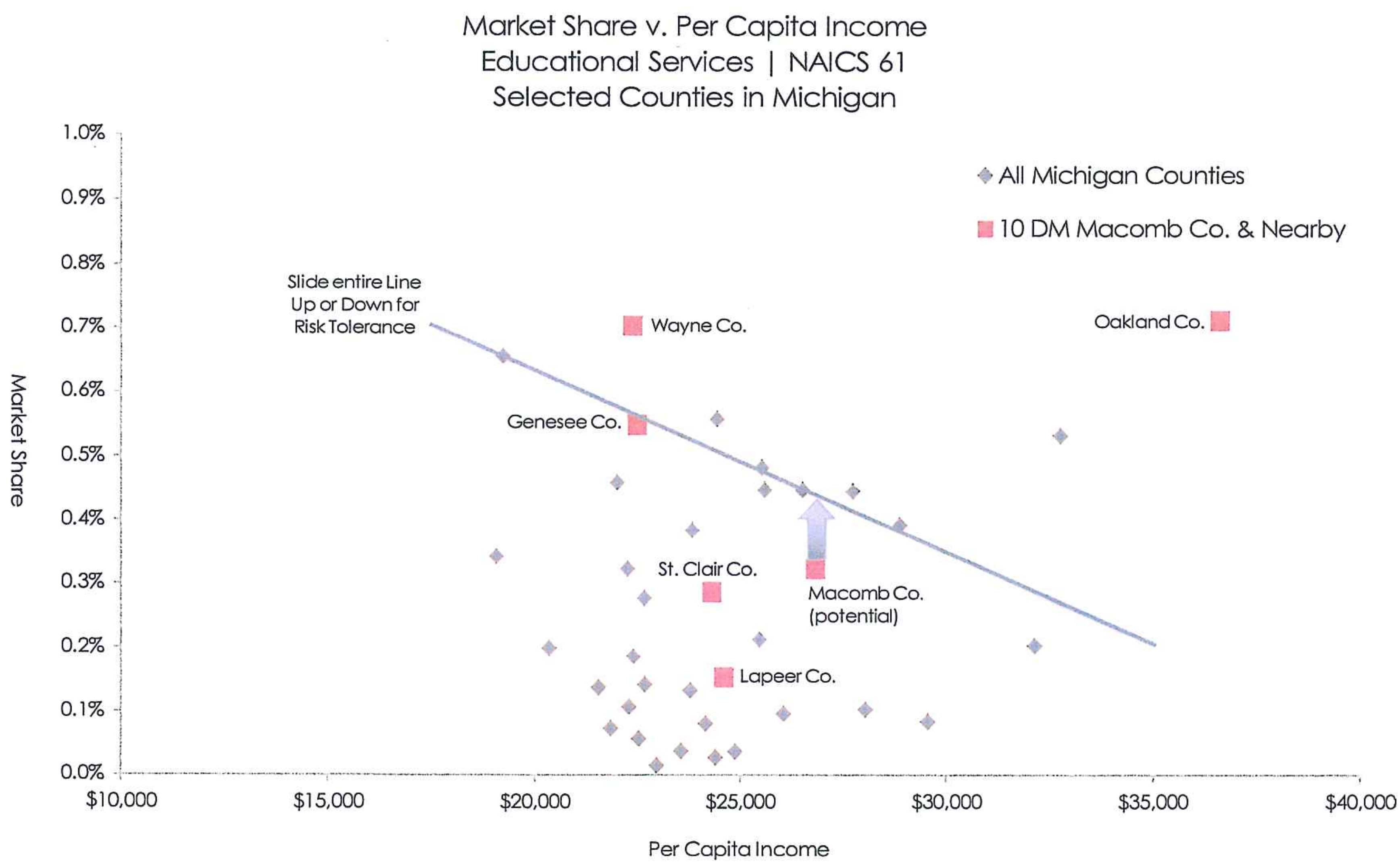


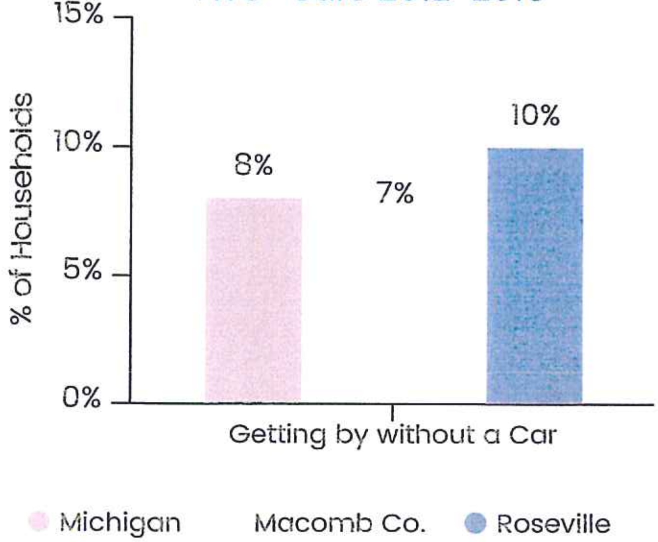
Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.

Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2016 (5-yr) American Community Survey.

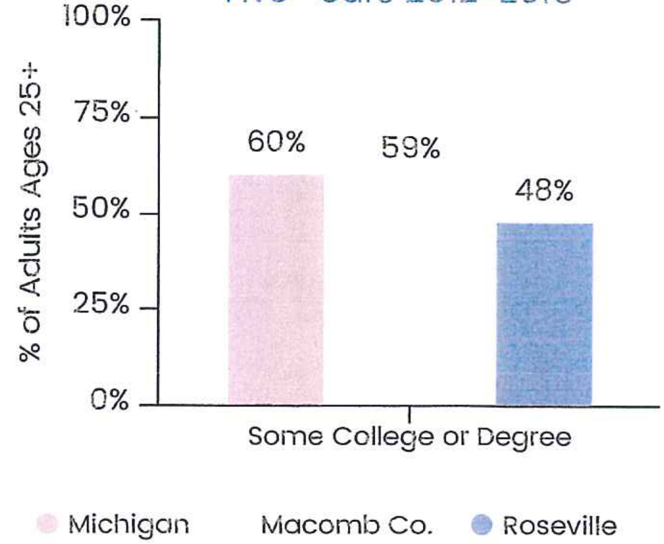
Education, Labor, Cars | Roseville

A comparison of vehicle ownership, education, labor force, and unemployment.

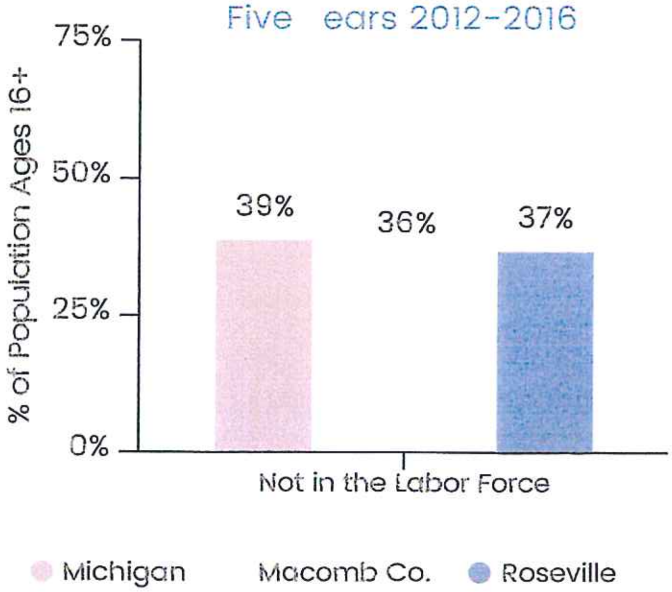
Share Without a Car
Five ears 2012-2016



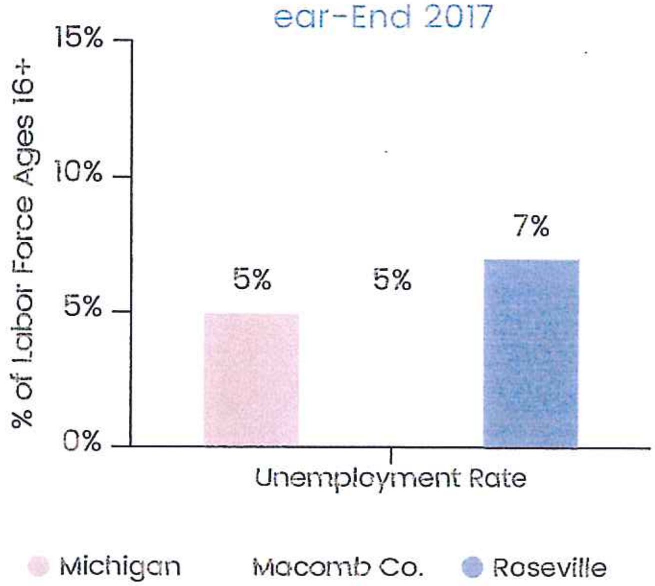
Educational Attainment
Five ears 2012-2016



Share not in the Labor Force
Five ears 2012-2016



Unemployment Rate
ear-End 2017



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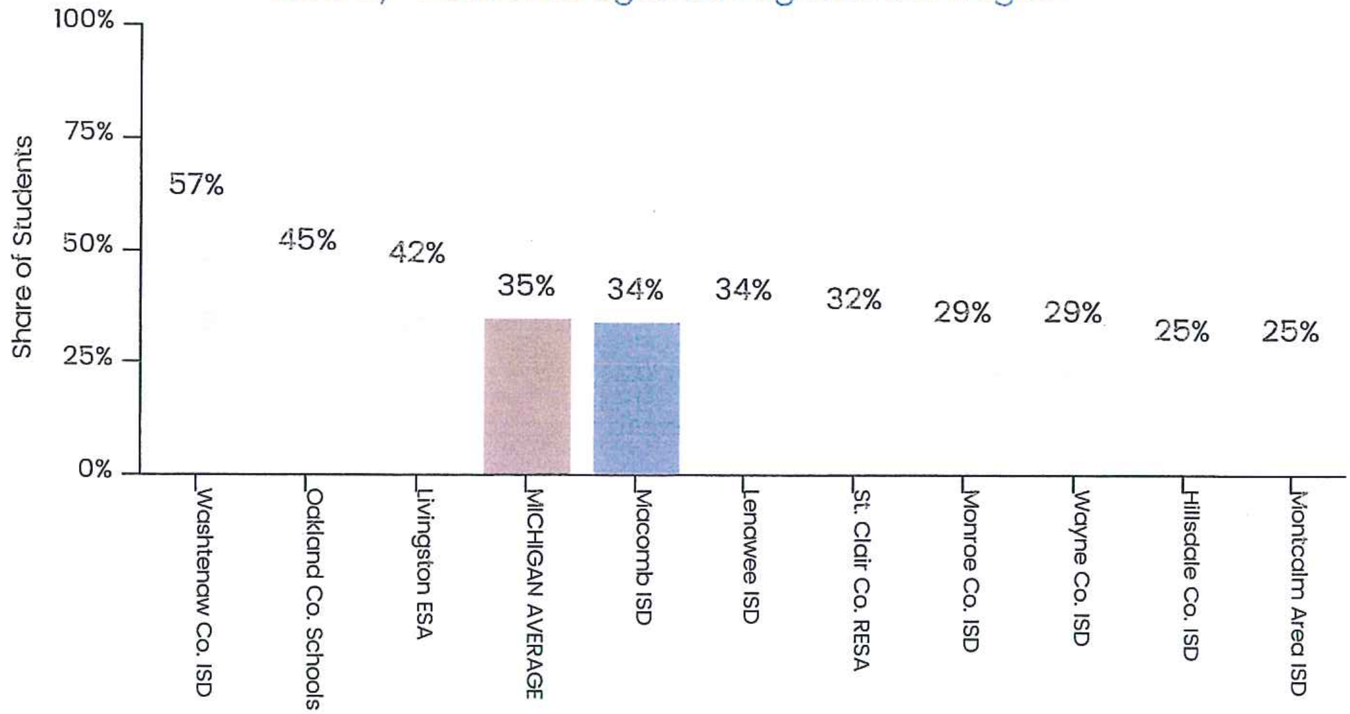
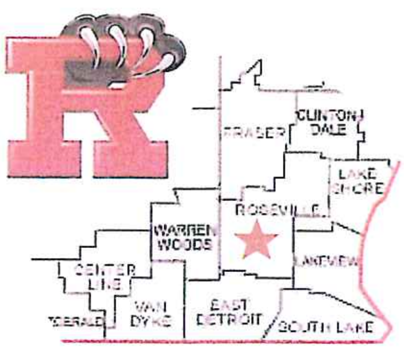
Underlying data by the American Community Survey with five year estimates for 2012 through 2016.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Municipal League, 2018.

College Readiness - Roseville

A comparison of college readiness among Grade 11 students, based on SAT Scores.

College Readiness - Grade 11 Students
County-Wide Averages throughout the Region





Observations: The Macomb Intermediate School District (ISD) has an average college readiness score of 34% among its Grade 11 students, which almost meets the statewide average of 35%.

Within the Macomb District, scores are below 20% for the Roseville Community Schools (not shown in the chart). However, the local district voluntarily participates in the Michigan Schools of Choice program, so new families moving into the city have a variety of choices nearby. These include some the county's higher scoring schools in Lakeview (36%, southeast of Roseville), Lake Shore (32%, east), Fraser (31%, north); plus choices among some charter schools.

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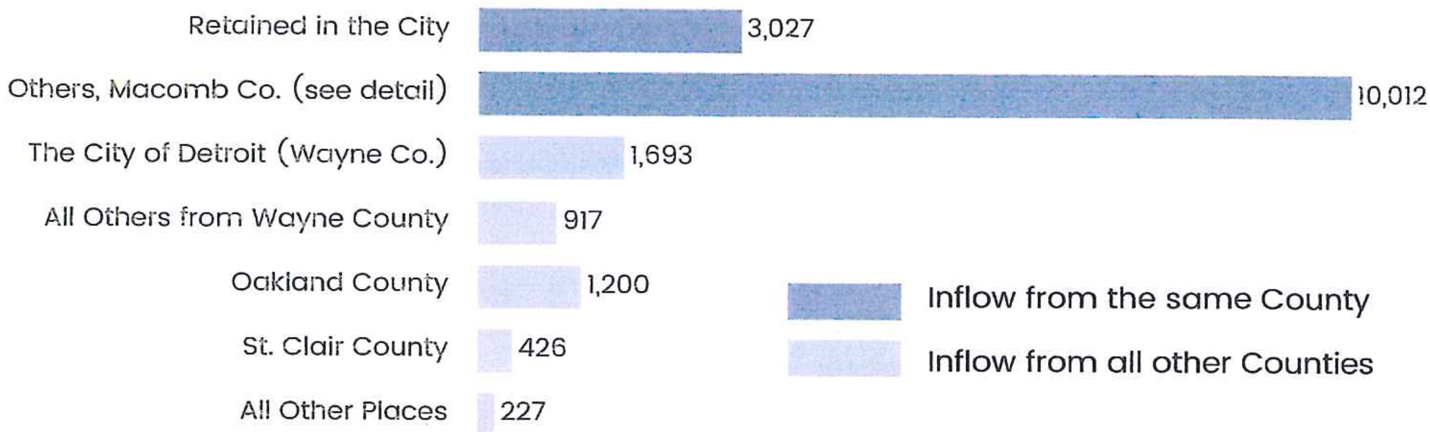
Data represents the share of Grade 11 students who met, were proficient, or advanced relative to the College and Career Readiness (CCR) standard for Adult Education, and based on their Scholastic Assessment Test (SAT) Total Scores in 2016 and 2017. Standards have been established by the U.S. Dept. of Education, and reported by the Michigan Dept. of Education. This data is consistent with reports on MISchoolData.org. Analysis and exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Municipal League, 201 .

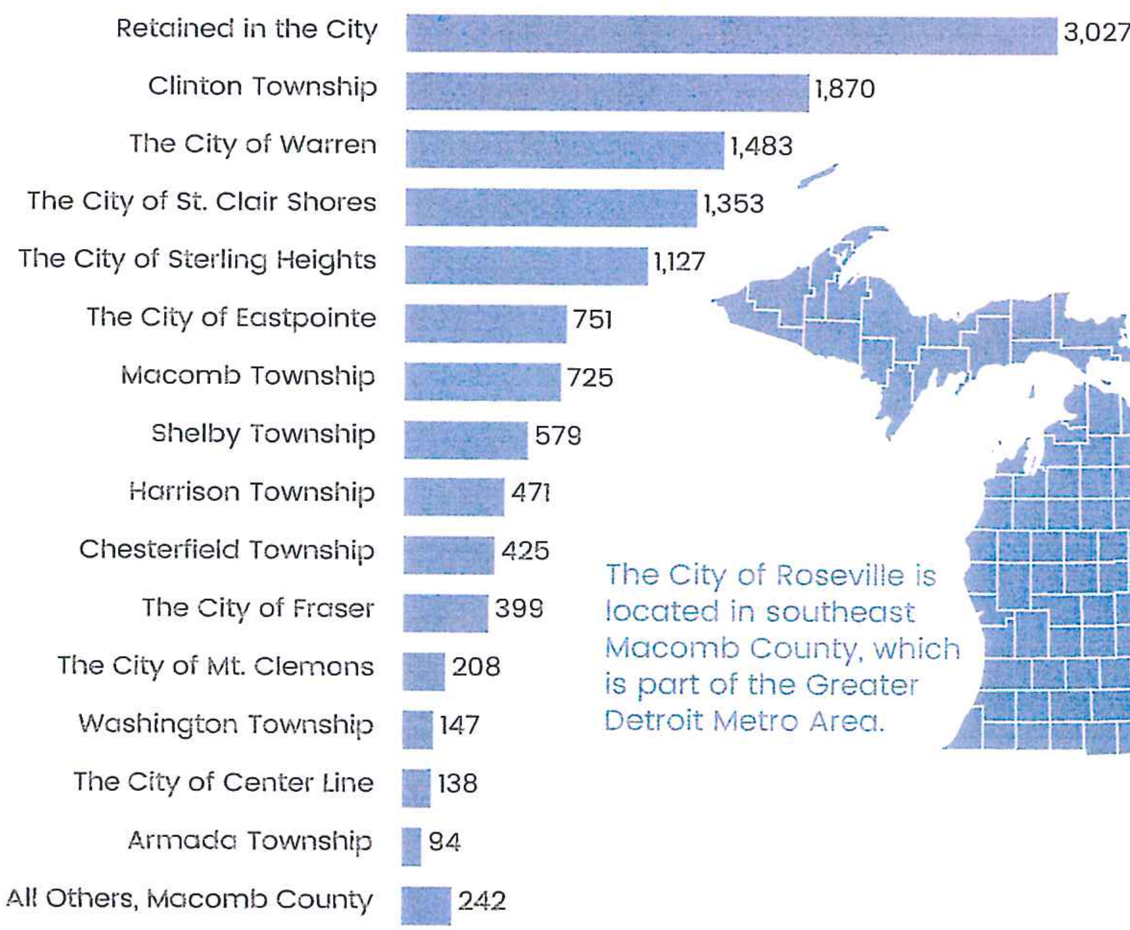
Worker Inflow | The City of Roseville

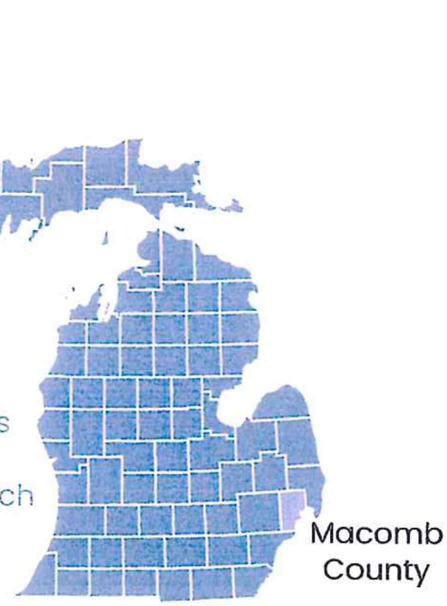
The number of workers commuting into the city each day, unadjusted for outflow.

Sources of Worker Inflow into the City of Roseville - County Totals



Sources of Worker Inflow into the City of Roseville - Details for Macomb County





The City of Roseville is located in southeast Macomb County, which is part of the Greater Detroit Metro Area.

Underlying data by the American Community Survey with 5-year estimates through 2013.
Analysis and exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Municipal League, 2018.

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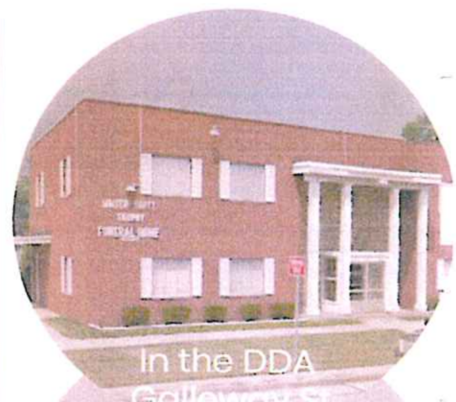
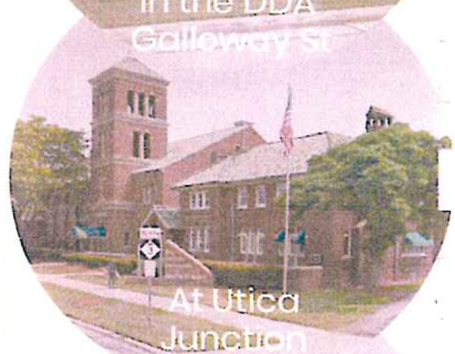
Section E

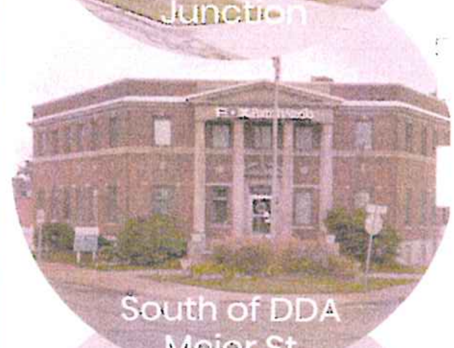
Qualitative Assessment

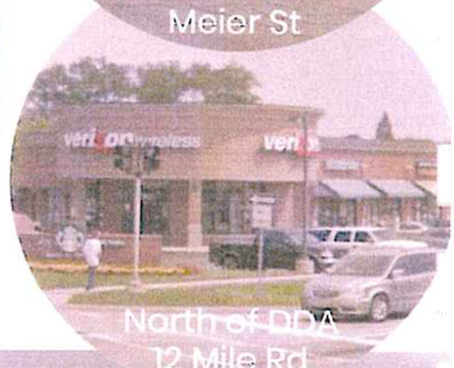
The DDA District | Roseville

A review of established, brick buildings within and near the DDA District.


In the DDA
Galleway St


At Utica
Junction


South of DDA
Meier St


North of DDA
12 Mile Rd

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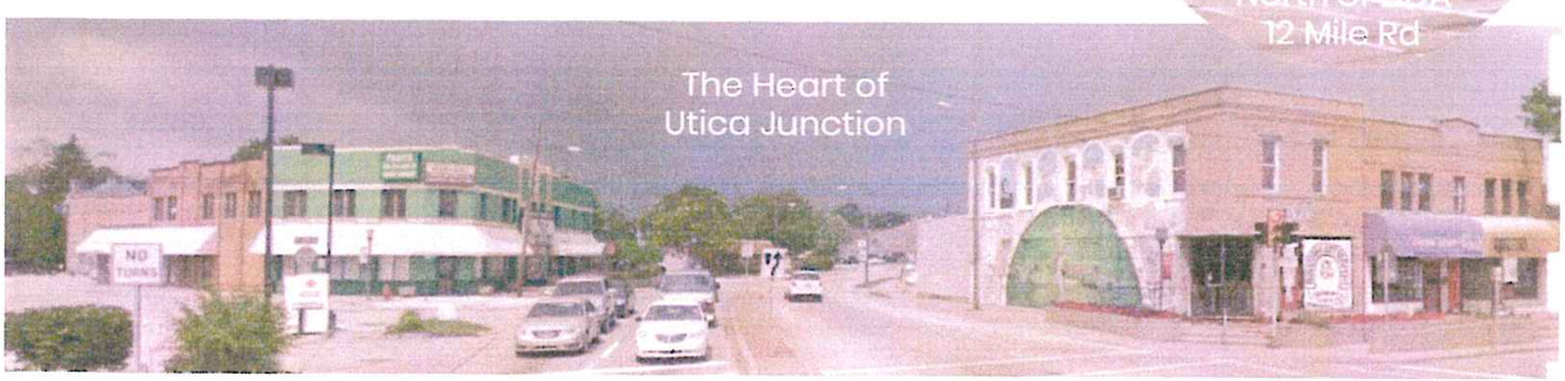
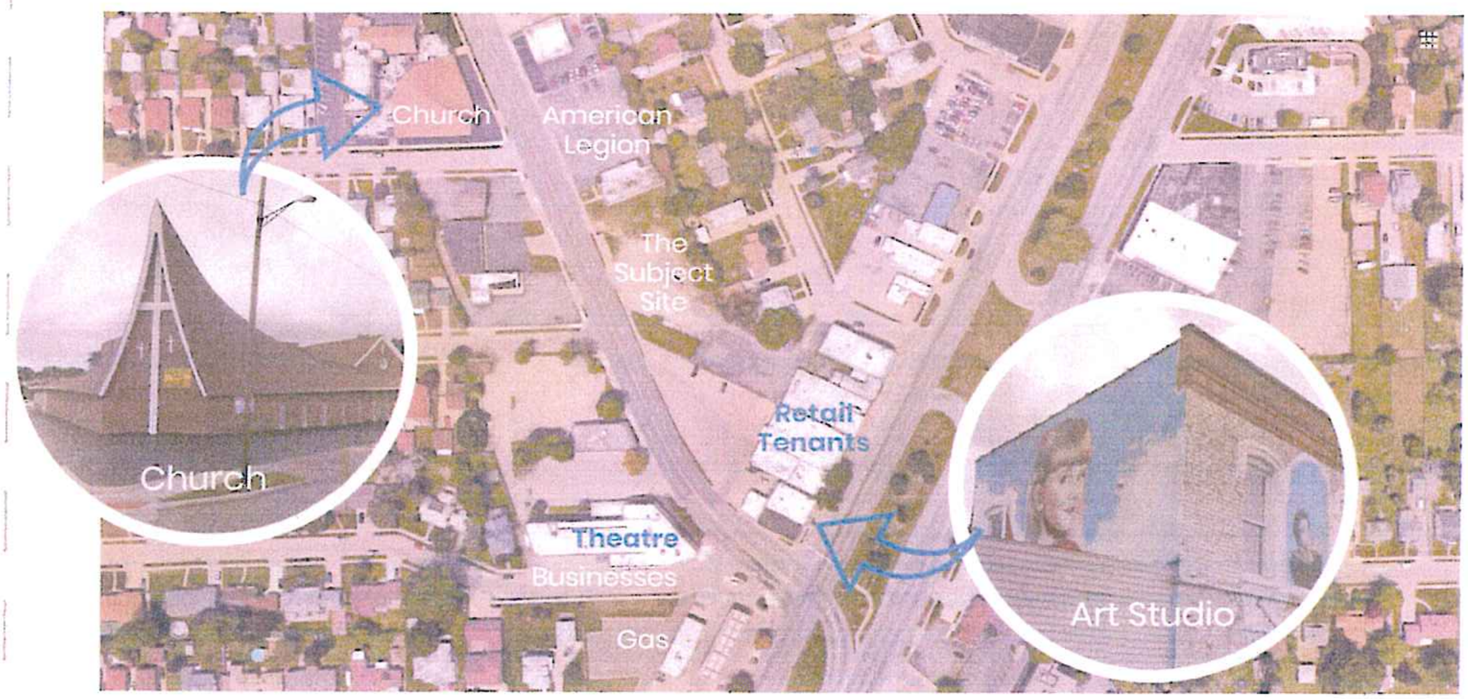

The Heart of
Utica Junction

Redevelopment Ready Sites ® | Roseville

A qualitative assessment of site marketability to prospective developers.



Redevelopment Ready Sites ® | Roseville

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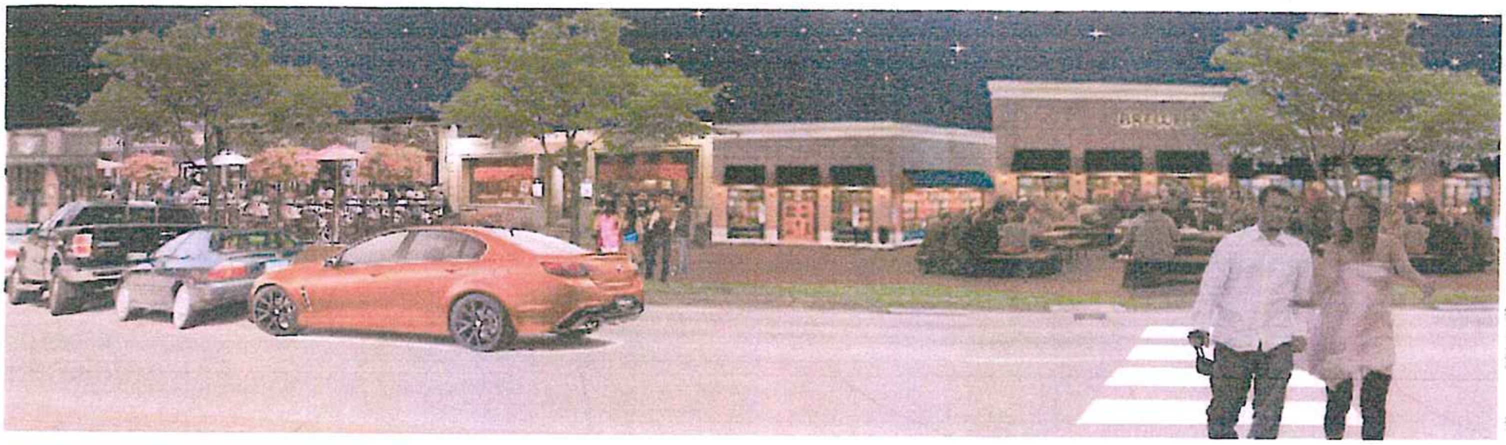
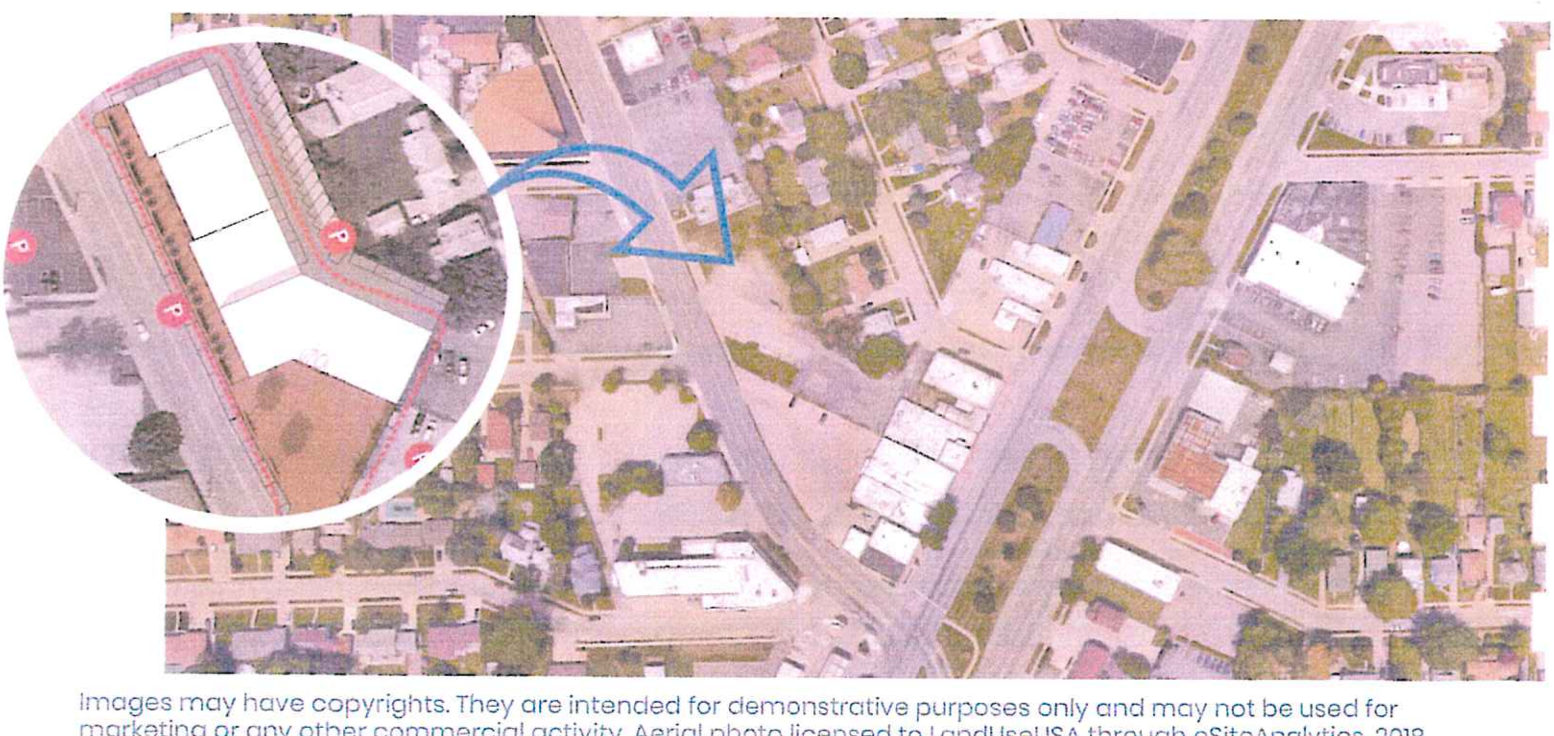



Concepts and renderings by
Peter Allen & Associates
on behalf of the MEDC.



PlaceScore™ | Utica Junction, Roseville

An assessment of downtown placemaking, progress, and strategies.

Total PlaceScore = 10
Population < 50,000

The City of Roseville has an overall PlaceScore of just 10 points, which is exceptionally low relative to other cities of similar size. Even so, the city is the first to become RRC certified (in 2014); and in 2016 it created a DDA with a TIF plan and overlay district. it is also taking the right steps to attract reinvestment into Utica Junction by making improvements to the infrastructure, streetscape, and pedestrian amenities.

PlaceScore Strategies

1. Clearly identify and maintain surface parking lots, to accommodate shoppers when on-street parking spaces are full. Complete ongoing streetscape improvements and celebrate the success with a ribbon-cutting event and other festivities.
2. Create a DDA website and Facebook page; post lists and maps of merchants with cross-links to the city website. Add and promote new attractions in the Utica Junction, such as a monthly summer concert series and farmers' market. Re-open the Roseville Theatre as a playhouse or cultural arts center (rather than using it as a church or non-retail businesses).
3. Continue making progress toward a 2019 update of the Master Plan and on a form-based code (FBC) for the DDA district. Ensure that progress is communicated and celebrated on the city website, stakeholder engagement, and the media.
4. As identified in the city's DDA plan, take an active part in the Michigan Main Street Program to further enhance business and economic development while supporting historic preservation.
5. Use WalkScore's application and user interface on hand-held devices to register attractions and amenities, including all restaurants, unique merchants, and historic buildings like the Roseville Theatre.
6. As identified in the city's DDA plan, complete a market analysis to establish a realistic idea of the city-wide capacity for new retail, and feasibility for converting big-boxes (like the vacant Kmart) into mixed-use projects.
7. Similarly, complete a housing study to identify the market potential for missing housing formats, such as lofts above the street-front retail; plus townhouses and row houses in transitional areas and for neighborhood infill.

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Average Daily Traffic | Roseville

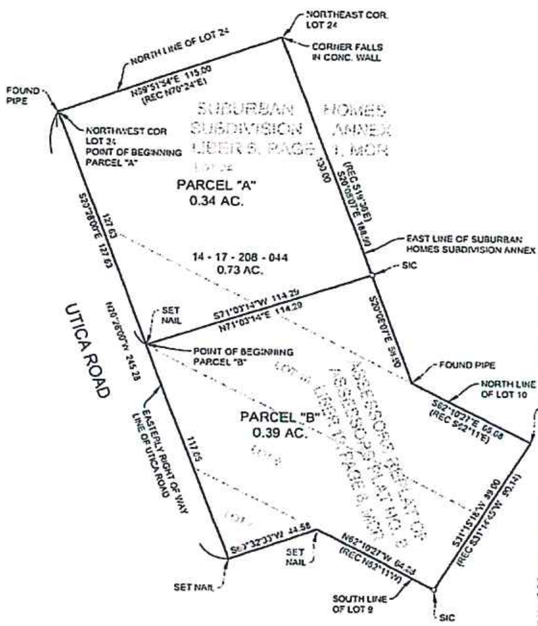
Assessment of visibility to highway traffic for potential advertising exposure.

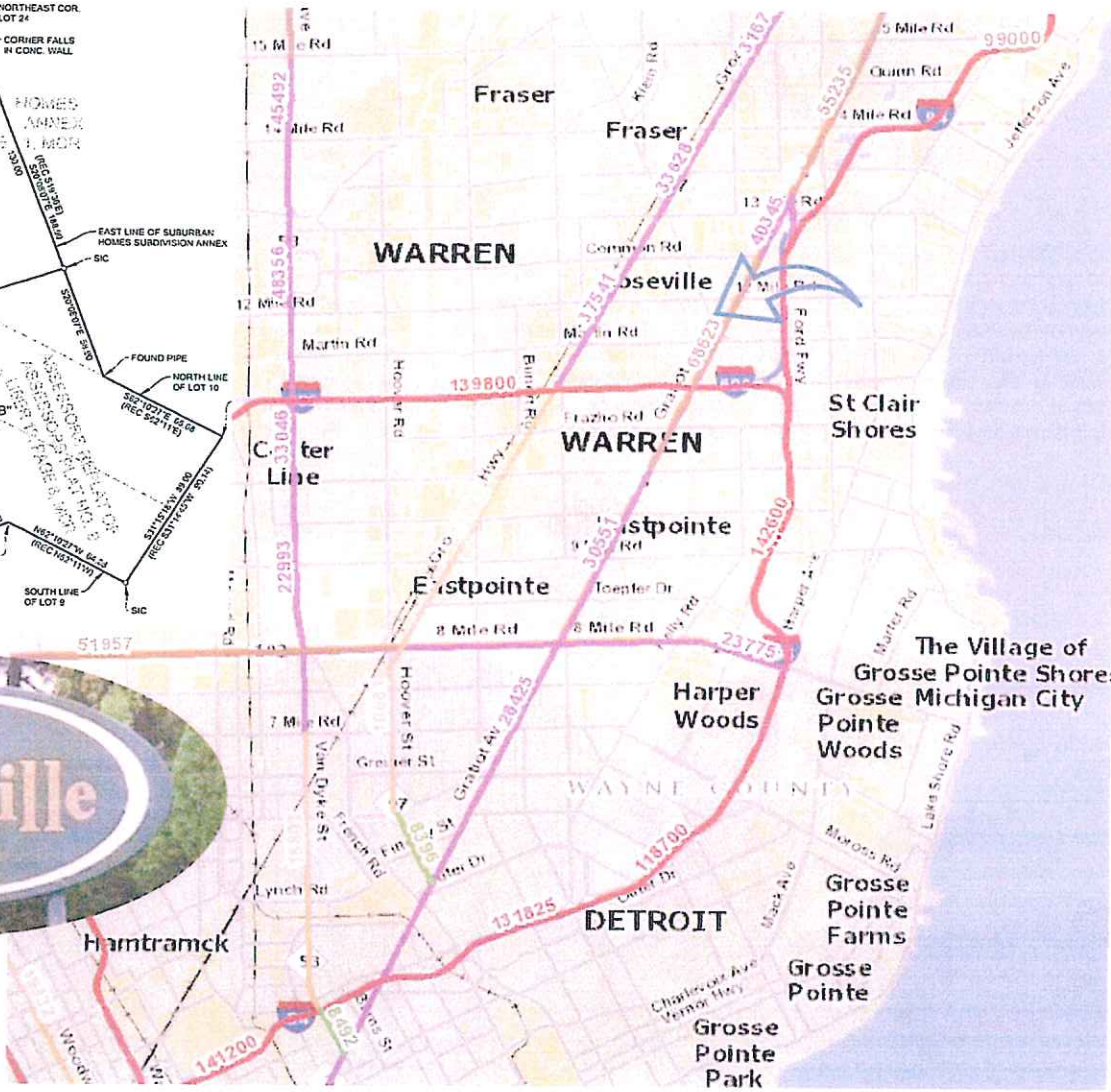
Key Observations

1. Advertisements for Downtown Roseville, existing merchants, and reinvestment opportunities should be strategically placed along highways and streets with the highest traffic volumes.

2. The peak highway volume in the City of Roseville is 68,623 vehicles daily along Gratiot Avenue (i.e., along Highway 3 near the I-695 interchange); and 37,541 vehicles daily along the Groesbeck Hwy. (Highway 97).

3. The high traffic volumes along Gratiot Avenue and near I-696 can generate 25 million advertising exposures annually. This can be leveraged in a strategy to intercept and attract shoppers and other visitors into downtown Roseville.



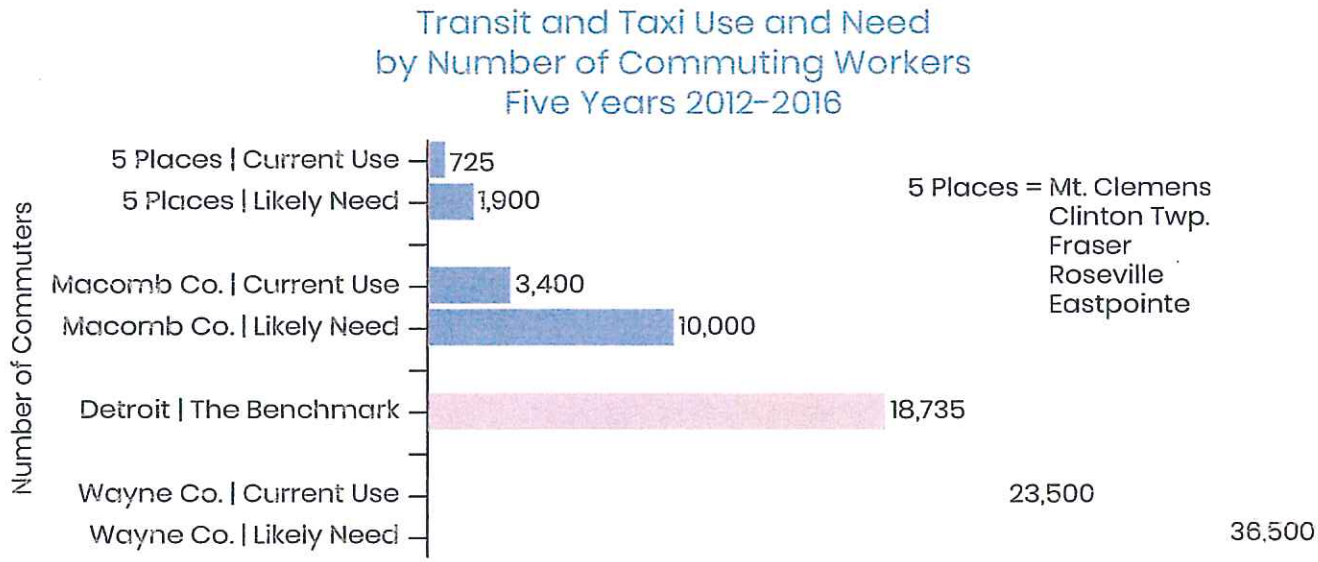


LandUseUSA UrbanStrategies

Maps & average daily traffic volumes provided by the Michigan Dept. of Transportation for 2016.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Municipal League, 2018.

Public Transit Use and Need | Roseville

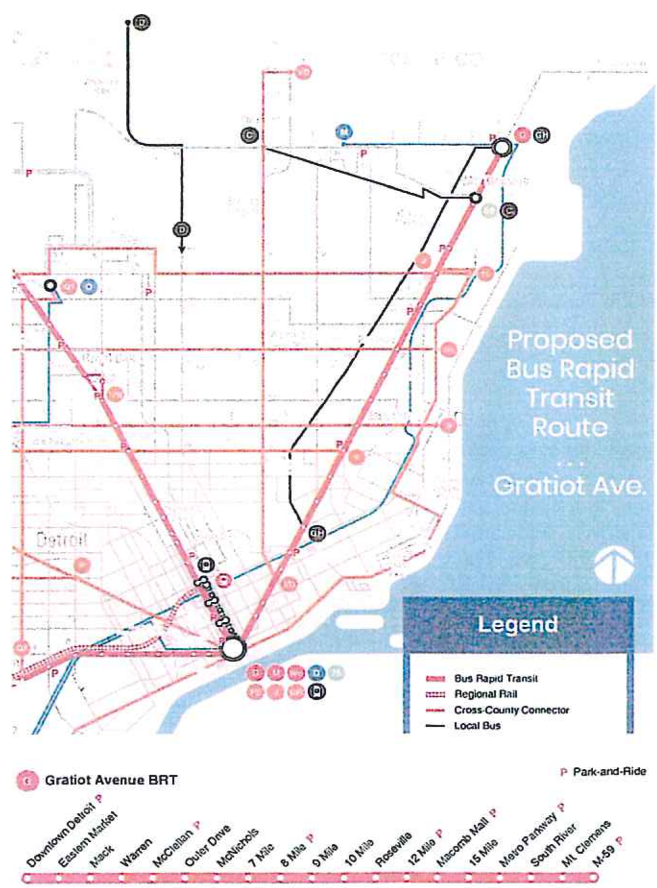
An assessment of public transit need based on the City of Detroit as a benchmark.



"Likely Need" is based on a comparisons to the City of Detroit and on the basis of two variables:
1) Share of households getting by without a car
2) Share of vehicular commuters using public transit

Assuming that these two variable for City of Detroit represent good benchmarks, then about 10,000 residents of Macomb County are likely to use public transit if and when it is available. However, the American Commmunity Survey (5-year estimates through 2016) reports that only 3,400 of Macomb County's resident commuters are actually using public transit. This suggests a significant gap and likely need for more public transit choices.

These figures are highly preliminary, and do not represent a comprehensive study or analysis. Results should not be used as the sole source for supporting or advocating for new bus rapid transit services between the City of Detroit and Macomb County.



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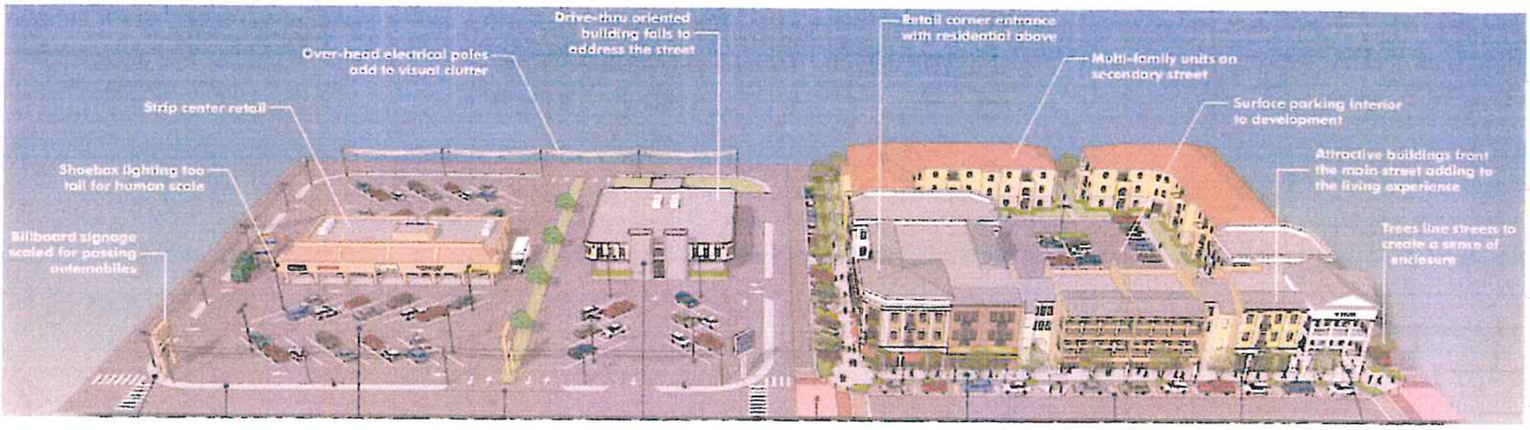
UrbanStrategies

Underlying data by the American Community Survey with five year estimates for 2012 through 2016.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of the City of Roseville, Michigan, 2018.

Mixed-Use Development Guides

An introduction to formats preferred by urban target markets & shoppers.



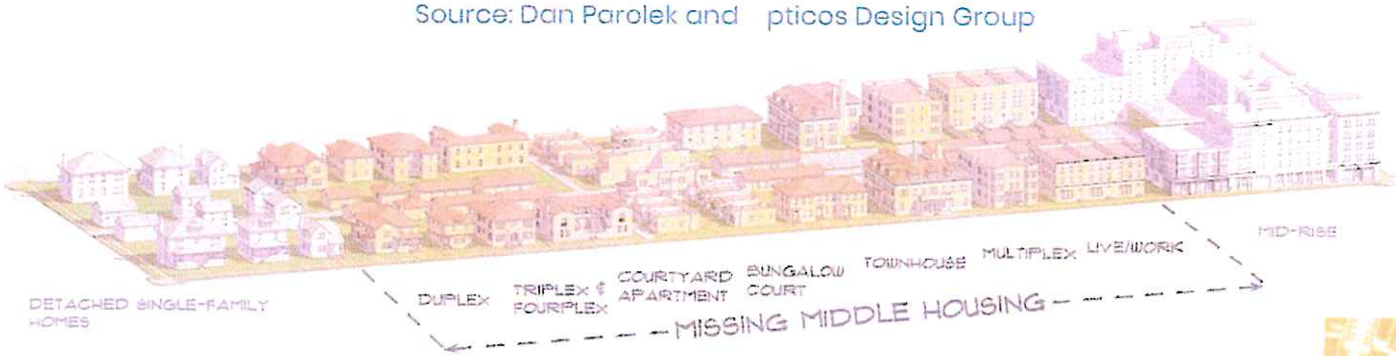
Above: TownMaker's Guide to Healthy Building Placement

Source: Walkable and Livable Communities Institute

Walkable and Livable Communities Institute

Above and Below: Downtowns and Urban Edges

Source: Dan Parolek and pticos Design Group



OPTICOS

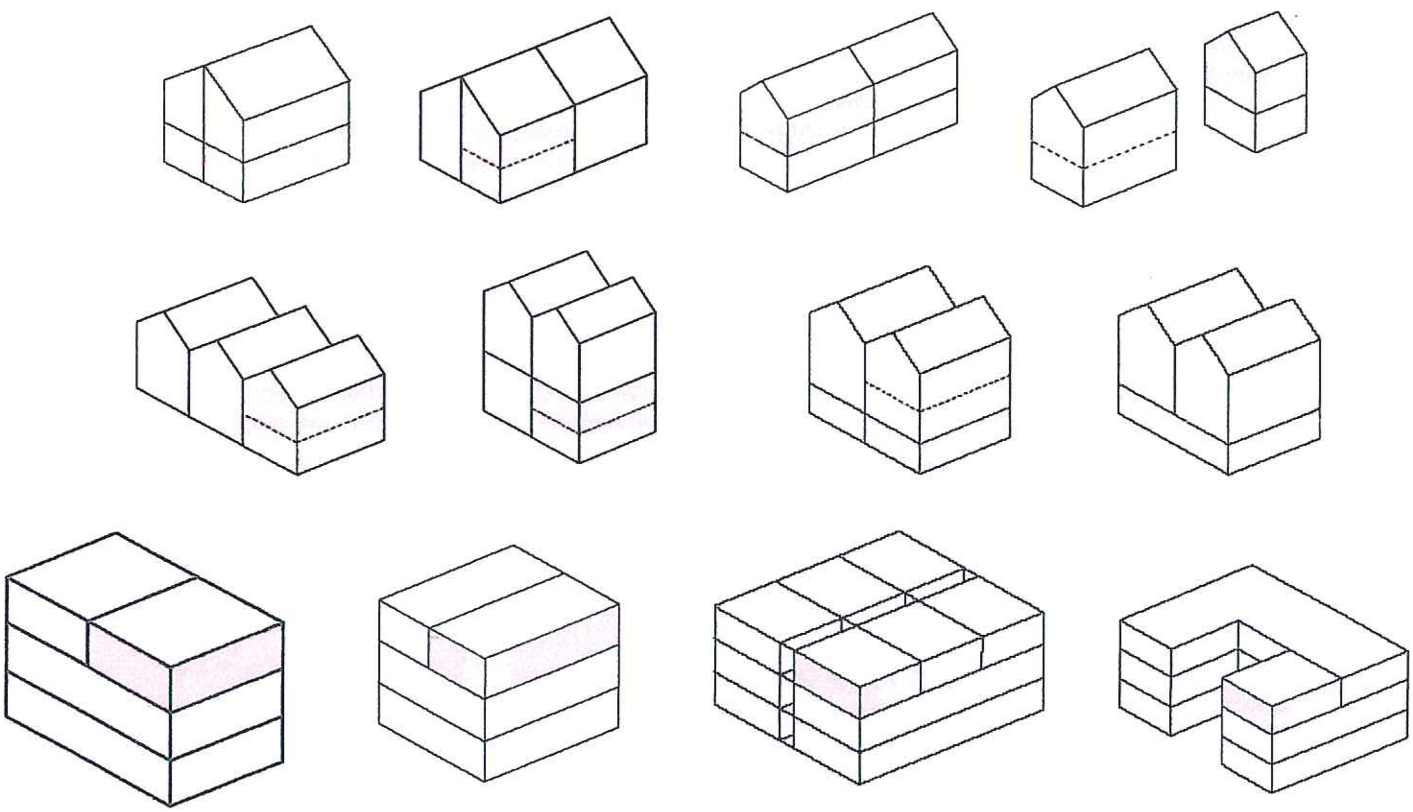
Exhibit prepared by LandUseUSA, LLC on behalf of the Michigan Land Bank, with permission from the contributors; 2018.

Missing Middle Housing

A typology of urban building formats that migrating households are seeking.

Above: Missing Middle Housing | Urban Infill and Transition

Source: Dan Parolek and Opticos Design roup



Above: Building Blocks for Mixed-Use Projects
Flex Space Lofts Above and/or Behind Street-Front Retail

Exhibit prepared by LandUseUSA, LLC with permission from the contributors, and on behalf of the Michigan Land Bank, 2018.

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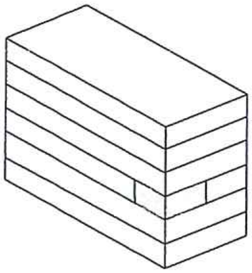
Midrise: Large
(Missing Middle Housing Typology)

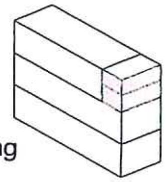
Exhibit K.8

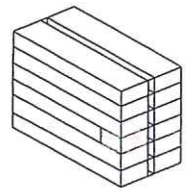


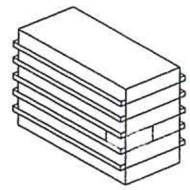
Five to eight floors of apartments. Historically rare in the Twin Cities, many examples have recently been built.

common names
Elevator
apartment

variations







data
60-240 units/building
5-8 floors/building
interior entry
net site density:
26-148 /units/acre

Home design

- Building bulk is large but can be shaped to respond to surroundings.
- Interior unit layout critical for livability.
- Ground is usually shared. Private outdoor space possibilities limited to balcony, rooftop.
- Elevators are required.
- Security at ground can be challenging with high number of residents and relatively few at a level where they can adequately observe.
- Needs clear definition of public and private space.

Site design

- Parking is structured in denser locations, above or below grade.
- Great access to street, but careful design needed to maintain privacy.
- Site planning has potential to affect the ecological character of the site.

Neighborhood amenities

- Can incorporate a variety of unit sizes and affordabilities seamlessly.
- Density can support frequent transit service and local shopping, and be near regional amenities such as downtowns and recreation.
- Well designed public outdoor spaces such as sidewalks, parks, and trails are crucial.

Elliot Park, Minneapolis, MN

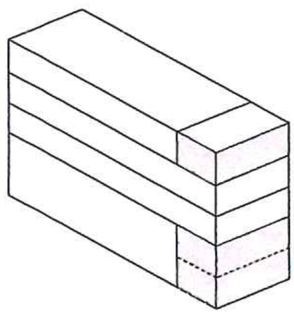
North Quadrant, St. Paul, MN

Mill District, Minneapolis, MN8

Metropolitan Design Center I College of Architecture and Landscape Architecture I University of Minnesota
1 Rapson Hall, 89 Church St. SE, Minneapolis, MN 55455 www.designcenter.umn.edu

Over Commercial
(May also include Main Street Mix and/or Live-Work)

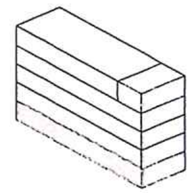
Exhibit K.9



Apartment units above a commercial space.
Residential can also occupy part of ground floor.

common names
Vertical mixed use

variations



data
25-100 units/building
3-5 floors/building
interior or exterior entry
net site density:
26-84 units/acre

Home design
- Interior unit layout is critical for livability.
- Shared entries, hallways, elevators, and stairs require careful design for safety and sociability.
- Unit individualization occurs mostly at interior unit entrance.
- Wide variety of outdoor spaces if rowhouses are below, much narrower range if commercial.
- Distinct building uses require careful design to separate or integrate pedestrian access, parking, deliveries, and trash pick-up.

Site design
- Parking needs careful attention to balance day and evening uses.
- May exist in street-frontage situation or, more rarely, walk-up options.

Neighborhood amenities
- High density allows for good access to services and facilities, including transportation, recreation, education, shopping, etc.
- An active pedestrian environment and shared parks are required for livability.

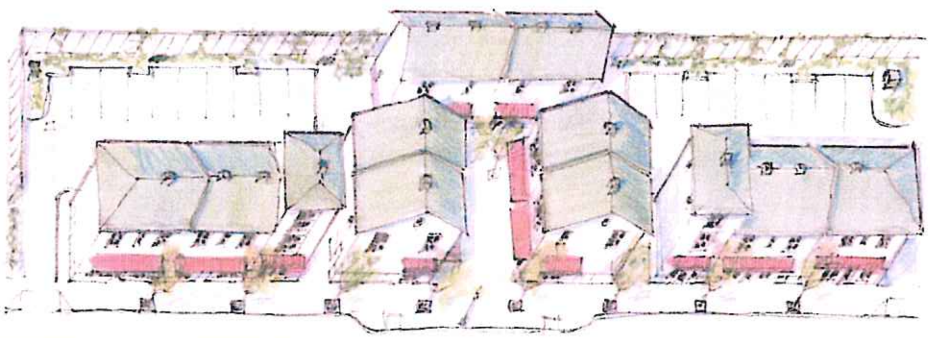
North Quadrant, St. Paul, MN

Lyndale Avenue, Minneapolis, MN

St. Louis Park, MN

Metropolitan Design Center I College of Architecture and Landscape Architecture I University of Minnesota
1 Rapson Hall, 89 Church St. SE, Minneapolis, MN 55455 www.designcenter.umn.edu

Quality Renderings of Missing Middle Formats



Contact: Anderson | Kim Architecture + Urban Design
R. John Anderson, Principal | direct: (530) 624-5093
email: janderson@andersonkim.com

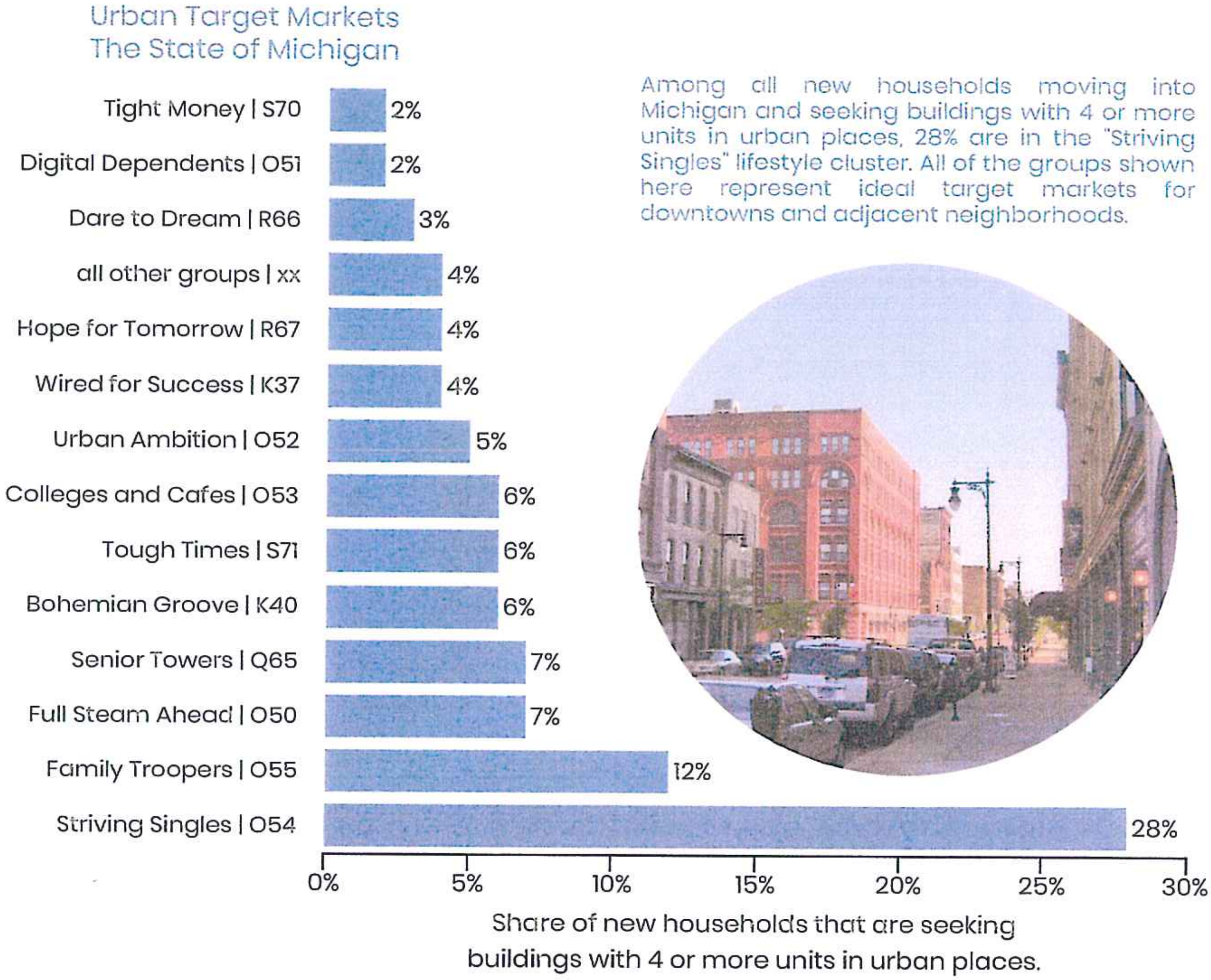
AK ANDERSON|KIM architecture+urban design

Section F

Target Markets

Urban Target Markets | MICHIGAN

New target markets seeking buildings with 4 or more units in urban places.



Among all new households moving into Michigan and seeking buildings with 4 or more units in urban places, 28% are in the "Striving Singles" lifestyle cluster. All of the groups shown here represent ideal target markets for downtowns and adjacent neighborhoods.

Urban Target Markets – The Striving Singles target market represents an amazing 38% of all migrating households seeking buildings with four or more units in urban places. The second largest group is Family Troopers, followed by Full Steam Ahead and Senior Towers (low-income seniors living in high-rise towers).

The Striving Singles group has an Experian code of O54, which generally means that it is 54th in income among 71 lifestyle clusters living across the nation. The most affluent urban target market migrating within Michigan is the Wired for Success group, with the 37th highest income among the group. The lowest income target market is Tough Times.

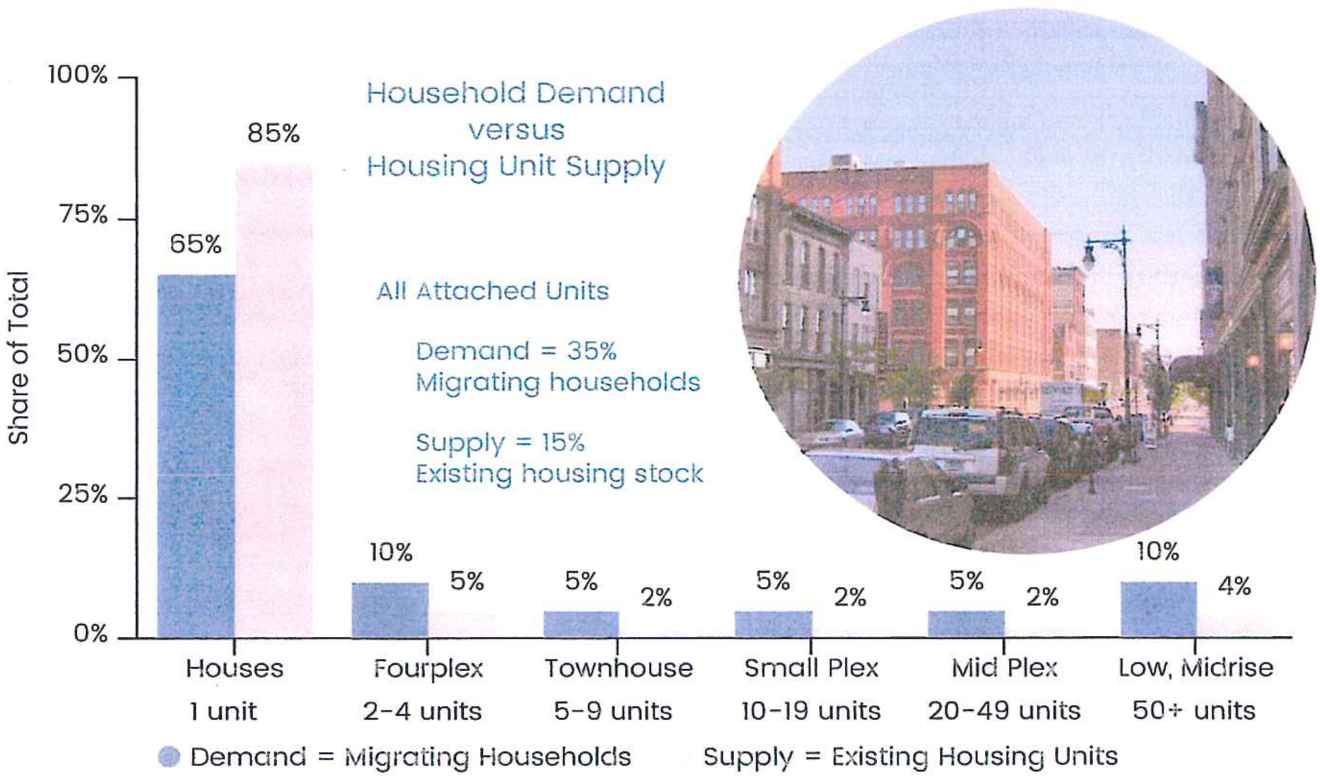
These lifestyle clusters all represent good targets for new housing formats in urban places. However, new developments must not be targeted exclusively at any single group. Rather, income-integrated buildings are needed for migrating singles of all ages. Avoiding exclusive formats and branding like "affordable housing", "worker housing", "senior housing", "student housing", and "luxury living" will help new developments achieve the highest possible absorption rates while encouraging diversity.

Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics. Analysis and exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Land Bank, 2018.

LandUseUSA
UrbanStrategies

The Housing Mismatch | MICHIGAN

A comparison of household demand and housing unit supply by building size.



Introduction – Across the state, cities and developers are beginning to respond to the market gaps and missing housing formats – particularly in the urban places and waterfront settings. Analytic results from countless studies across the state support what most developers know instinctively – the demand for new housing is being driven by singles of all ages who are on the move and seeking for-lease, attached formats located in the downtowns and urban neighborhoods.

With remarkable consistency place-to-place and across the state, there is a mismatch between the preferences of migrating households and the formats of available housing choices. Renters in particular are seeking new housing formats in urban places, and particularly attached units that offer spectacular views of a downtown, river, and/or lake. When they are unable to find choices, then they compromise by renting detached houses.

Statewide, only 65% of migrating households are seeking detached houses, and 35% are seeking attached units. However, attached choices represent only 15% of the housing supply. This reinforces the need for more attached for-lease housing formats in urban places. This does not mean that there is a need for more "apartments" at the fringe of the communities. Rather, there is a need for ongoing reinvestment into downtowns with the rehab of lofts above street-front retail, and the addition of townhouses and other transitional formats nearby.

Every Place is Unique – This information represents state-wide averages and generally applies to individual cities, villages, and townships. However, each place has a unique profile, including geographic setting, household composition, tenure, migration, lifestyle clusters (target markets), and existing housing formats. Therefore, the magnitude of market gaps will vary greatly from place to place.

Underlying data generated by the supply-demand and target market analysis models.
Analysis and exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Land Bank, 2018.

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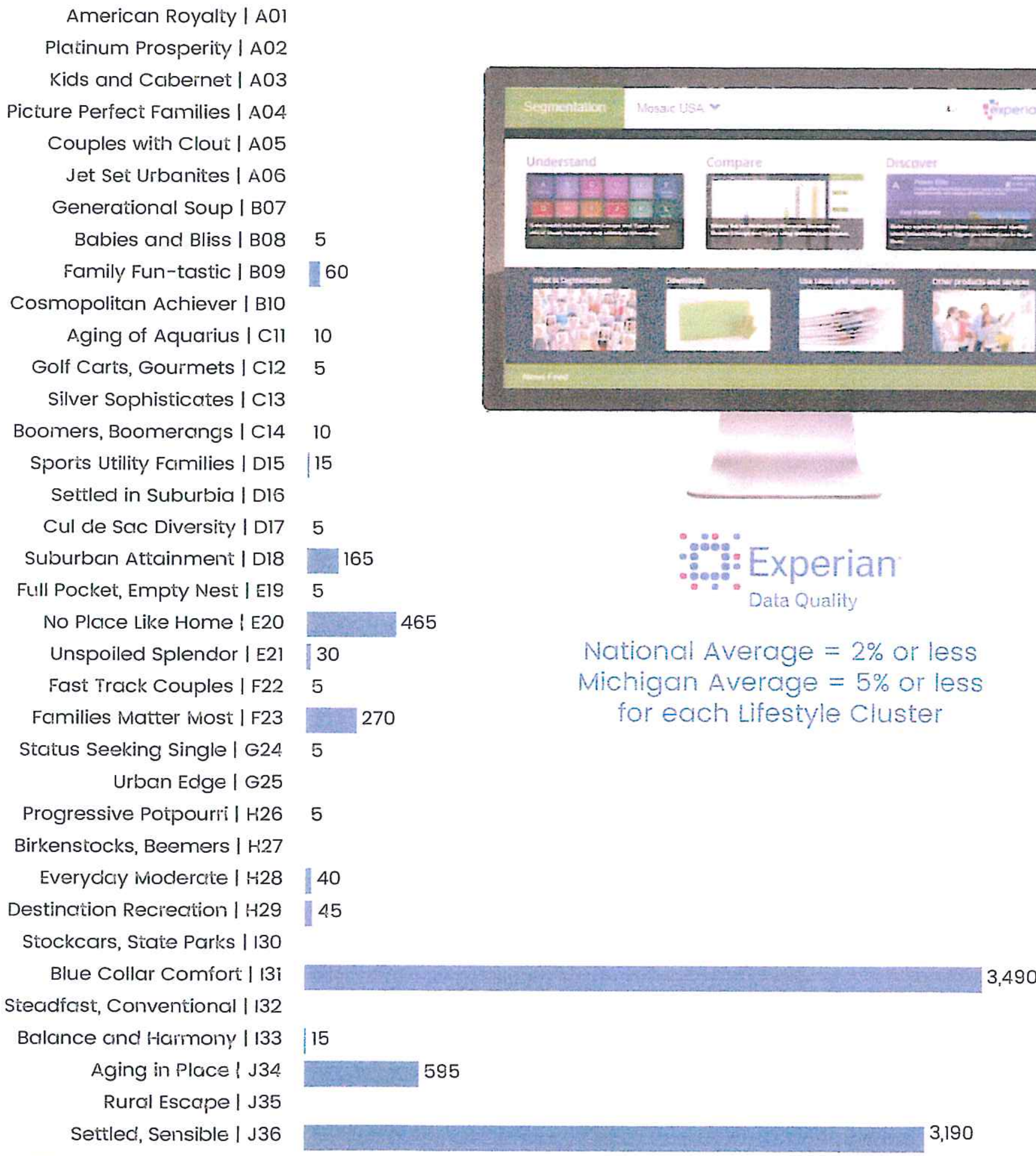
UrbanStrategies

1-36 Lifestyle Clusters | Roseville

Established Lifestyle Clusters | Number of Households Inclined to Live in the City.



Experian
Data Quality

National Average = 2% or less
Michigan Average = 5% or less
for each Lifestyle Cluster

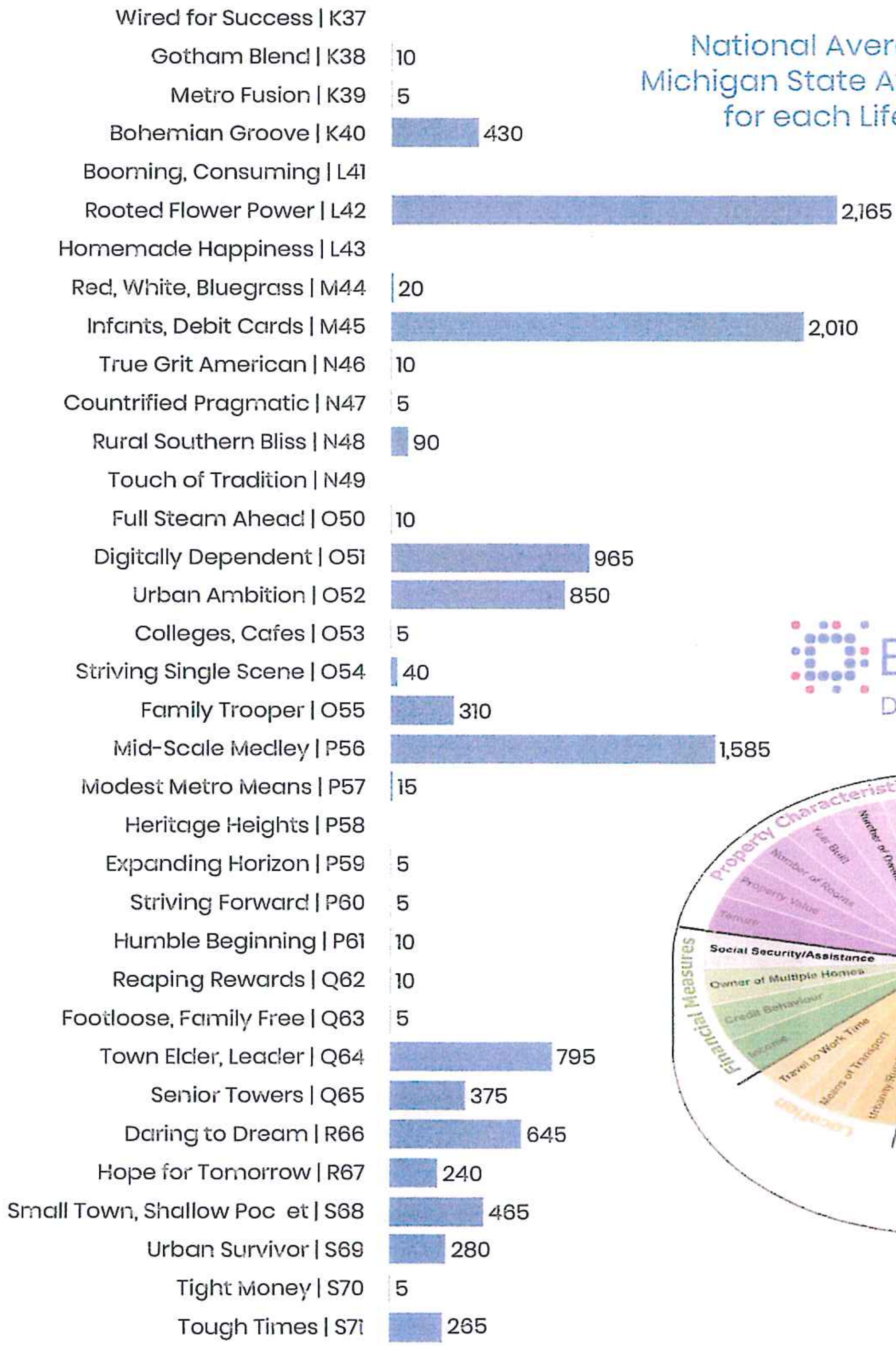
LandUseUSA
UrbanStrategies

Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through 2017.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Municipal League, 2018.

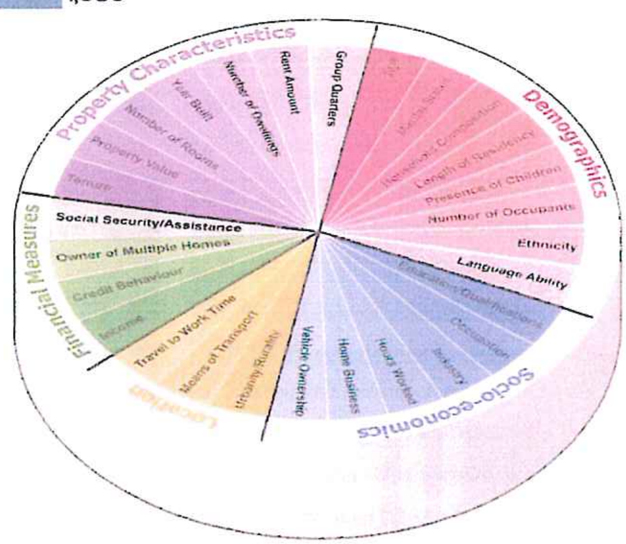
37-71 Lifestyle Clusters | Roseville

Established Lifestyle Clusters | Number of Households Inclined to Live in the City.

National Average = 2% or less
Michigan State Average = 5% or less
for each Lifestyle Cluster



Experian
Data Quality



Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through 2017.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Municipal League, 2018.

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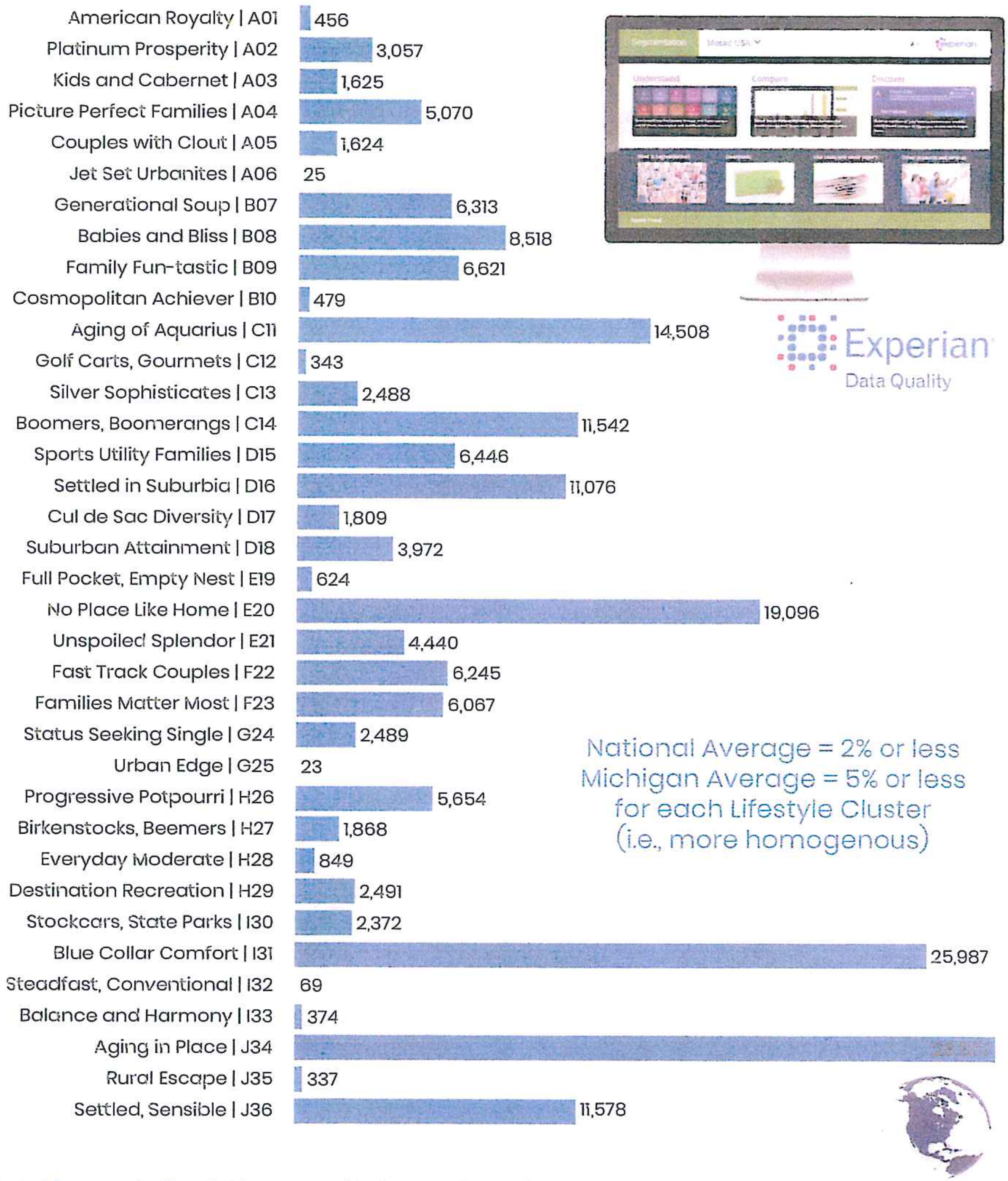
1-36 Lifestyle Clusters | Macomb County

Established Lifestyle Clusters | Number of Households Inclined to Live in the County.

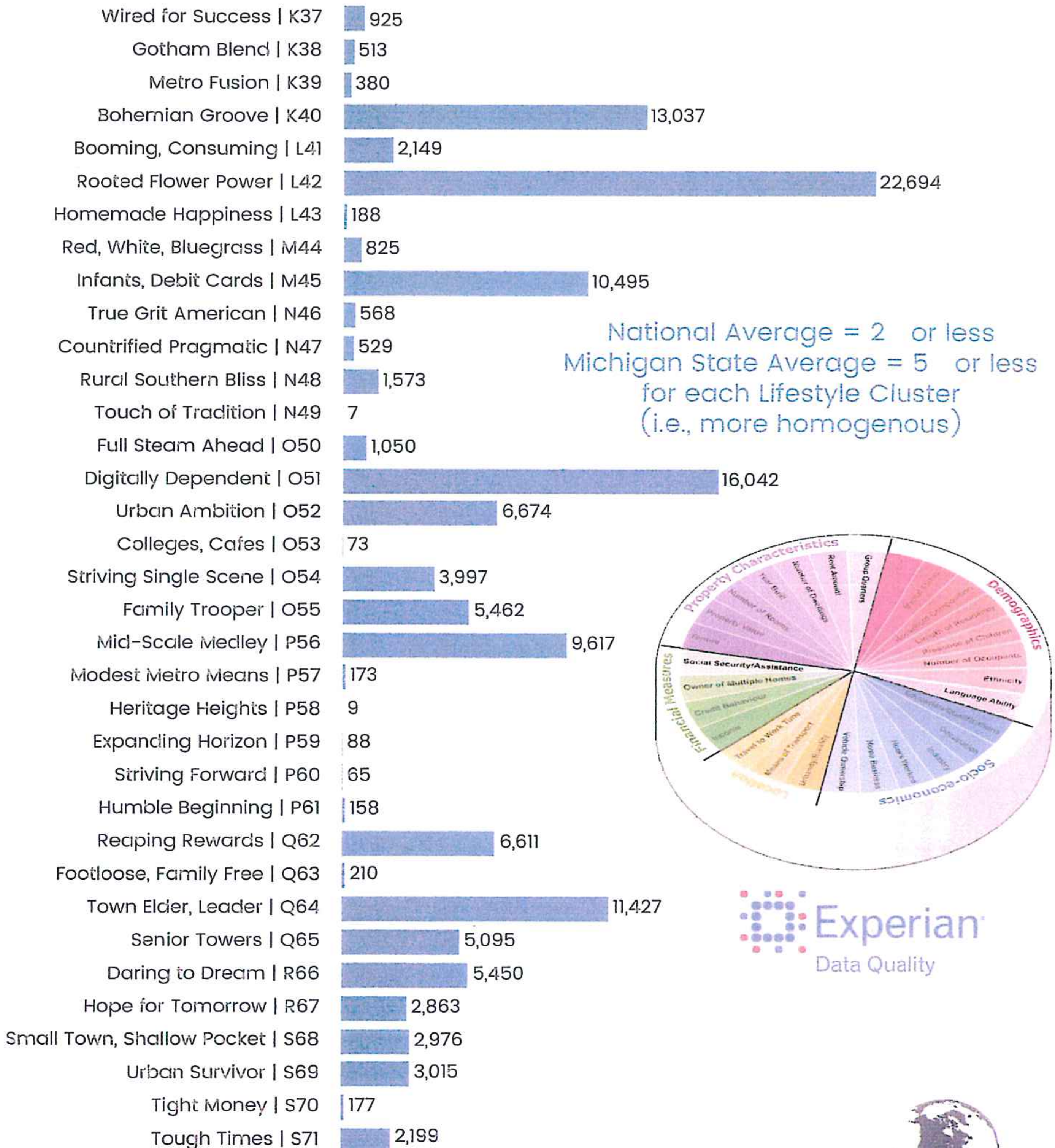


Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through 2017.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Municipal League, 2018.

LandUseUSA UrbanStrategies

37-71 Lifestyle Clusters | Macomb County

Established Lifestyle Clusters | Number of Households Inclined to Live in the County.



Experian

Data Quality

Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through 2017.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Municipal League, 2018.

LandUseUSA
UrbanStrategies

1-36 Lifestyle Clusters | Short Descriptions

As defined by Experian Decision Analytics with refinements by LandUseUSA, LLC ©

A01 - American Royalty - Wealthy influential couples and families in prestigious communities - Suburbs.
A02 - Platinum Prosperity - Wealthy and established empty-nesting couples - Suburbs.
A03 - Kids and Cabernet - Prosperous, middle-aged married couples focused on their children's lives - Suburbs.
A04 - Picture Perfect Families - Established families of child-raising households in wealthy communities - Suburbs.
A05 - Couples with Clout - Middle-aged childless couples living in affluent areas - Metros.
A06 - Jet Set Urbanites - Mix of affluent singles and couples enjoying diverse neighborhoods - Urban.

B07 - Generational Soup - Affluent couples and multi-generational families living a wide range of lifestyles - Suburbs.
B08 - Babies and Bliss - Middle-aged couples with large families and active lives - Suburbs.
B09 - Family Fun-tastic - Upscale, middle-aged families with busy lives focused on older children - Satellite Cities.
B10 - Cosmopolitan Achievers - Affluent middle-aged, established couples & families with dynamic lifestyles - Metros.

C11 - Aging of Aquarius - Upscale boomer-aged couples settled in detached houses - Cities, Nearby Suburbs.
C12 - Golf Carts and Gourmets - Upscale retirees & empty-nesters in comfortable golf communities - Urban Edges.
C13 - Silver Sophisticates - Mature, upscale couples & singles in larger detached houses - Suburbs.
C14 - Boomers and Boomerangs - Baby boomer adults with young adult children sharing their house - Suburbs.

D15 - Sports Utility Families - Upscale, multi-generational, middle-aged families with active lifestyles - Outer Suburbs.
D16 - Settled in Suburbia - Upper-middle-income diverse families & empty nesters - Established Suburbs.
D17 - Cul de Sac Diversity - Culturally diverse, middle-aged families settling into emerging communities - Suburbs.
D18 - Suburban Attainment - Upper middle-class couples and families moving to newer communities - Suburbs.

E19 - Full Pockets, Empty Nests - Empty-nesters with discretionary income and sophisticated lifestyles - Most Cities.
E20 - No Place Like Home - Middle-to-upper income, multi-generational households in detached houses - Urban Edges.
E21 - Unspoiled Splendor - Comfortably established baby boomer couples in detached houses - Small Cities, Rural Areas.
F22 - Fast Track Couples - Young, upwardly-mobile couples with active lifestyles - Inner Suburbs.
F23 - Families Matter Most - Young, middle-to-upper income families with active, family-focused lives - Suburbs.

G24 - Status Seeking Singles - Young, upwardly-mobile singles balancing work and leisure - Metros, Urban.
G25 - Urban Edge - Younger, up-and-coming singles living big-city lifestyles - Largest Metros.

H26 - Progressive Potpourri - Mature couples with comfortable and active lives - Suburbs.
H27 - Birkenstocks and Beemers - Middle-to-upper income couples living leisurely lifestyles - Small Cities.
H28 - Everyday Moderates - Multi-cultural couples & families choosing modest lifestyles - Suburbs to Mid-sized Cities.
H29 - Destination Recreation - Middle-aged couples working hard to support active lifestyles - Small Cities, Suburbs.

I30 - Stockcars and State Parks - Middle-income couples & families seeking affordable entertainment - Small Cities.
I31 - Blue Collar Comfort - Middle-income families working solid, blue-collar jobs - Small Cities.
I32 - Steadfast Conventionalists - Conventional Gen- families living in conventional detached houses - Coastal Cities.
I33 - Balance and Harmony - Middle-income families with lively lifestyles - City-Centric Neighborhoods.

J34 - Aging in Place - Middle-income seniors established in their homes and preferring to stay there - Suburban.
J35 - Rural Escape - Older, middle-income couples & singles living modestly comfortable lives - Small Cities, Rural Eges.
J36 - Settled and Sensible - Older, middle-income, empty nesting couples & singles living sensibly - City Neighborhoods.

Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through 2017.

37-71 Lifestyle Clusters | Short Descriptions

As defined by Experian Decision Analytics with refinement by LandUseUSA, LLC ©

K37 - Wired for Success - Young, middle-income singles and couples living socially-active lives - Cities.
K38 - Gotham Blend - Middle-aged, middle-income singles & couples with big city lifestyles - Urban, Large Cities.
K39 - Metro Fusion - Middle-aged singles living active lifestyles - Urban.
K40 - Bohemian Groove - Older, unattached singles enjoying settled lives in detached houses - Urban Neighborhoods.

L41 - Booming and Consuming - Older empty nester couples and singles enjoying relaxed lifestyles - Small Cities.
L42 - Rooted Flower Power - Middle-income baby boomer singles & couples, rooted & nearing retirement - Suburban.
L43 - Homemade Happiness - Middle-income baby boomers in detached houses - Small Cities, Rural.

M44 - Red, White, Bluegrass - Middle-income families with diverse household dynamics - Rural.
M45 - Infants and Debit Cards - Young, working families & single parents in small houses - Urban Neighborhoods.

N46 - True Grit Americans - Older, middle-income households located in nation's mid-section - Small Cities, Rural.
N47 - Countrified Pragmatics - Middle-income couples and singles with casual lifestyles - Rural.
N48 - Rural Southern Bliss - Middle-income, multi-generational families in the nation's south - Small Cities, Rural.
N49 - Touch of Tradition - Working, middle-aged couples and singles in detached houses - Rural.

O50 - Full Steam Ahead - Young and middle-aged singles on the move forward and upward - Mid-Sized Cities.
O51 - Digital Dependents - Gen-X and Gen-Y singles living digitally-driven lifestyles - Urban.
O52 - Urban Ambition - Gen-Y singles, some with children, moving into urban places - Mid-Sized Cities, Urban.
O53 - Colleges and Cafes - Young singles, recent grads, faculty & staff connected to colleges - College Towns.
O54 - Striving Single Scene - Young singles living in the nation's midwest and south - City Centers, Urban.
O55 - Family Troopers - Families & single parents, with current or recent connections to the military - Nationwide.

P56 - Mid-Scale Medley - Middle-aged, moderate-income singles, many starting over - Mid-Sized Cities.
P57 - Modest Metro Means - Moderate-income singles settled in moderate communities - Inner-City Neighborhoods.
P58 - Heritage Heights - Moderate-income singles & families settled in apartments - Urban, Compact Neighborhoods.
P59 - Expanding Horizons - Middle-aged, middle-income families - Border Towns.
P60 - Striving Forward - Moderate-income families & single parents in newer communities - Urban Edges.
P61 - Humble Beginnings - Multi-cultural singles, some with children, starting in apartments - Inner-Cities, Urban.

Q62 - Reaping Rewards - Retired couples and widowed singles living relaxed, uiet lives in detached houses - Suburban.
Q63 - Footloose and Family Free - Older couples and widowed singles living active, comfortable lives - Urban Edges.
Q64 - Town Elders - Elders and community leaders settled into small houses and living frugally - Small Cities.
Q65 - Senior Towers - Low-income seniors settled into apartments with some rent assistance - Metros, City Edges.

R66 - Dare to Dream - Aspiring young couples & singles, some with children, just starting out - Inner-City, Urban.
R67 - Hope for Tomorrow - Hopeful, young, single parents with low-incomes, living in apartments - Mid-Sized Cities.

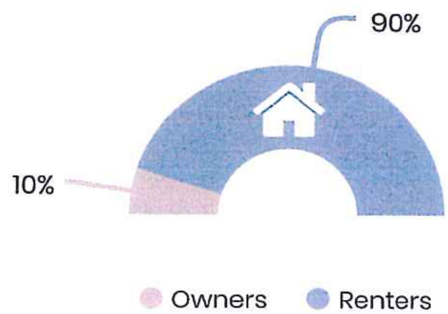
S68 - Small Towns, Shallow Pockets - Older, low-income empty nesters & singles with tight budgets. - Small Satellite Cities.
S69 - Urban Survivors - Older, low-income singles, some with children, settled & living modestly - Urban Neighborhoods.
S70 - Tight Money - Middle-aged, low-income, unattached singles seeking to move upward - Small Cities, Urban Edges.
S71 - Tough Times - Older, low-income singles, struggling to get by in apartments - Inner-Cities, Compact Neighborhoods.

Bohemian Groove | K40

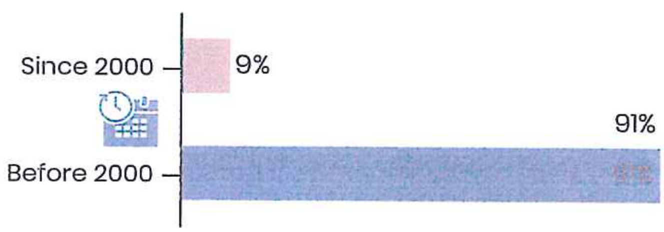
Lifestyles and Housing Preferences | Michigan Averages

Average Annual Movership Rates

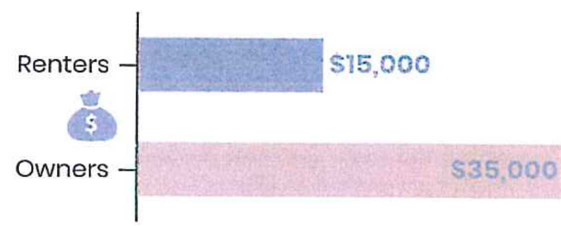
Average Tenure



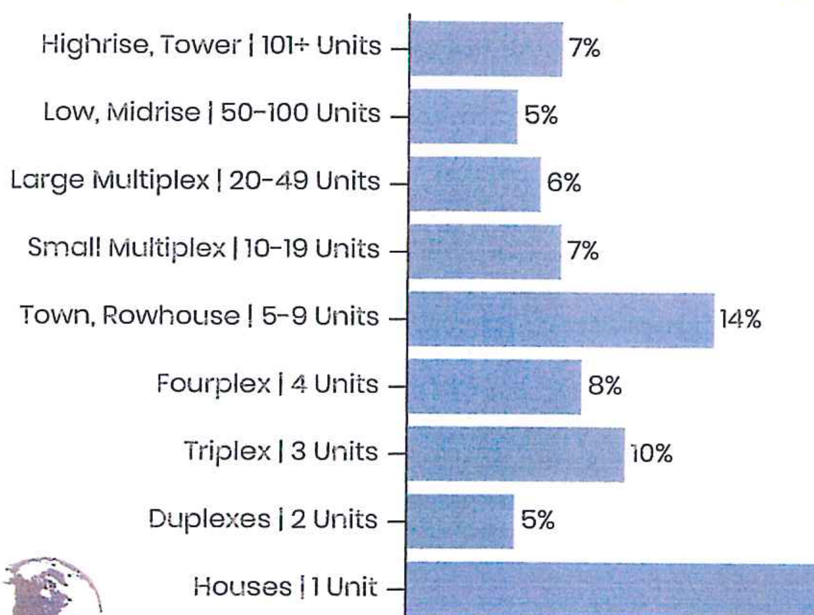
Inclination for Newer Units

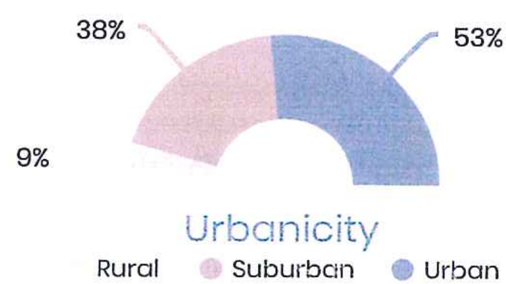


Median Household Income



Inclination for Units by Building Size and Urbanicity





LandUseUSA
UrbanStrategies

Source: Underlying data by Experian Decision Analytics; exhibit and analysis by LandUseUSA, 2018

Demographic Profile for Selected Target Market
K40 | Bohemian Groove

Geography: Settled in second-tier cities, and scattered across the country, but more likely to be found in the Northeast or West.

Housing Format: Affordable city apartments, including low-rise garden apartments and row houses of varying vintage.

Housing Tenure: Nearly 80 percent are renters.

Movership: A transient group and half have been in the same residence for fewer than three years. They don't like to accumulate possessions, including homes, in case they get the urge to move on.

Age: Older adults; about two-thirds are between the ages of 46 and 65; and most are over 50 years old.

Family Composition: The majority of this segment has never-married, but nearly a third has been married and they are starting over as divorced or widowed individuals. They are part of the growing wave of older singles, and prize their individuality.

Education: Average educations, with a mix of high school graduates and some college. They are still hungry for learning, and often take adult education classes. Favorite classes are in painting, cooking, furniture refinishing, and other subjects that allow them to mingle with other graying singles.

Jobs and Work: Holding down modestly paying jobs in the service sector, particularly jobs in health care, social services, and the military.

Income: Low incomes; average incomes are less than two-thirds the national average.

Transportation: They manage to sink down roots quickly. They own cars, and prefer compact and mid-sized economy cars.

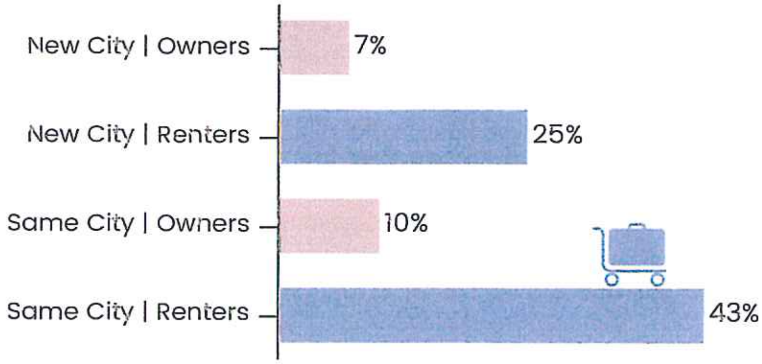
Leisure: An eclectic group with laid-back, quiet, and unassuming lifestyles. They cultivate large circles of friends from a wide variety of backgrounds, and are active in community groups. Free time is spent at home, listening to music, cooking, making crafts, and painting.

Retail Shopping: Dining out is usually to a casual dining or bistro restaurant, including moderate chains. They patronize discount and dollar stores but will declare that they prefer local stores. They are good consumers for craft and hobby stores, musical instrument stores, fresh produce, health foods, vitamins, and alternative medicines. However, they are slow to buy technology products, and have little interest in conspicuous consumption or the latest fashions. They rarely use the internet to make a purchase. They will also patron movie theaters.

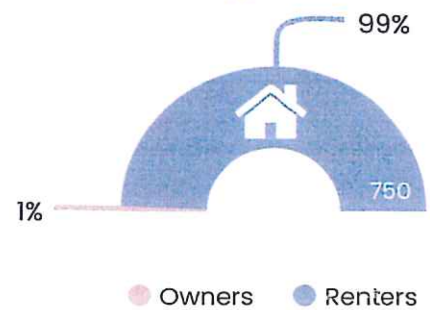
Tight Money | S70

Lifestyles and Housing Preferences | National Averages

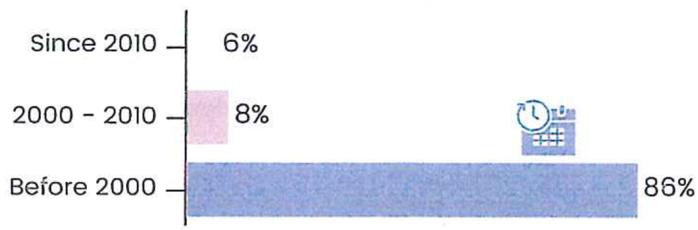
Average Annual Movership Rates



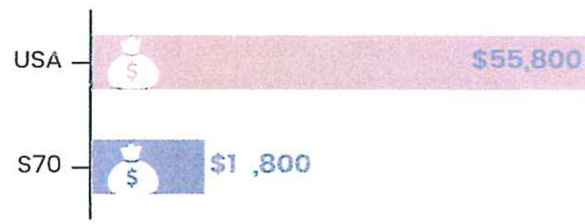
Average Tenure



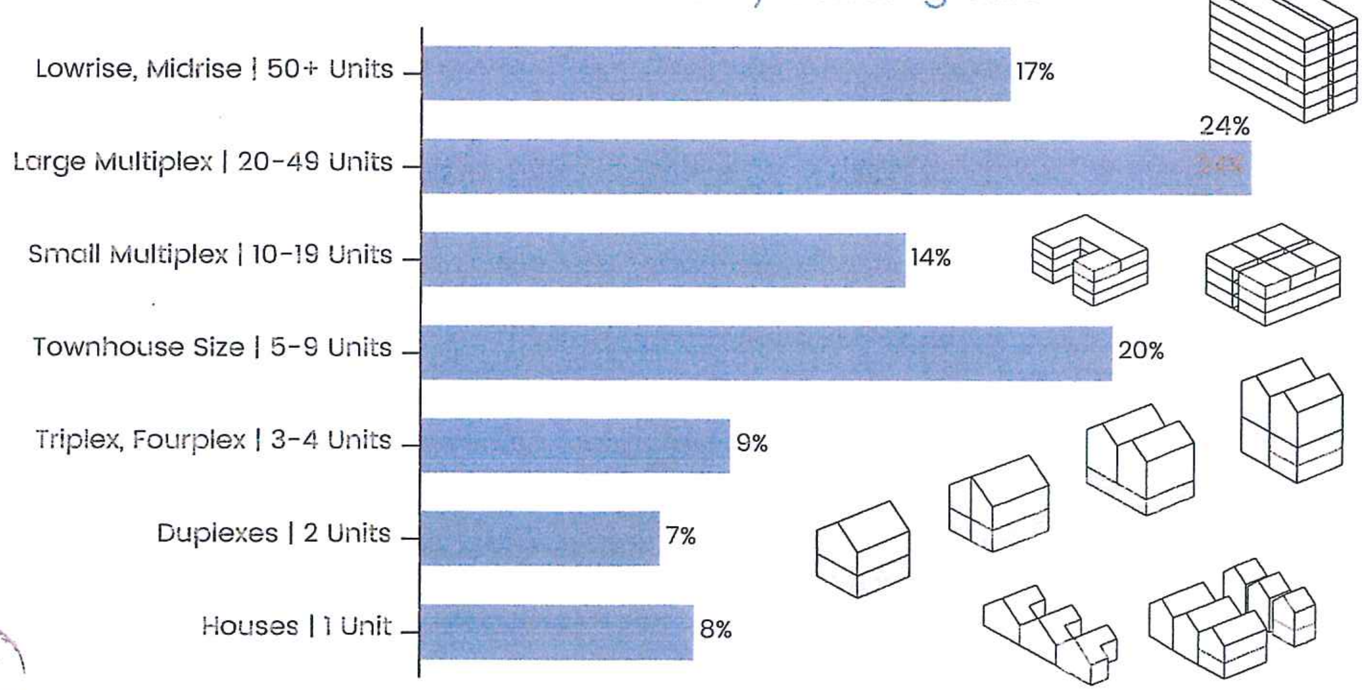
Inclination for Units by Decade Built



Median Household Income



Inclination for Units by Building Size



LandUseUSA UrbanStrategies Source: Underlying data by Experian Decision Analytics. Exhibit and analysis by LandUseUSA, 2018.

Demographic Profile for Selected Target Market
S70 | Tight Money

Geography: Centered in the South and Midwest, and located in exurban towns and small cities, and small bedroom communities to larger metro areas. They are often located in tired and worn neighborhoods where the residents often worry about crime and violence.

Housing Formats and Tenure: Living in low-rise apartments and duplexes. Few can afford to own a home, and over 95 percent are renters.

Movership: They lack roots and are dealing with the challenges of a transient existence. More than 40% have lived at the same address for less than a year and two-thirds for fewer than three years.

Age: Middle-aged singles and divorced individuals in their 30's and 40's. The majority of household heads are between the ages of 35 and 50.

Family Composition: Nearly one-quarter are single parents; and three-quarters are without children. Most are single or divorced, although some are older single parents with children still living at home.

Education: Low educational attainment. 60 percent never finished high school, and fewer than 5 percent have a college degree.

Jobs and Work: Most are holding minimum-wage jobs as laborers and service-sector workers. Nearly two-thirds of the adults work at low-level sales or service-sector jobs, mostly in health care, food services, or tech support. Many would like to start their own business or try a new line of work.

Income: One of the lowest average incomes in the country, they struggle to support even a simple lifestyle. They worry about living beyond their means; have few investments or savings; get by with occasional loans; and prefer paying with cash and money orders.

Transportation: They would prefer to own a car, but nearly 60 percent of the households can't afford to. Those who can buy a car will settle for a used economy car that's reliable.

Leisure: Unable to afford many leisure activities, they spend quiet evenings at home watching television, listening to music, or cooking. These are stressed-out Americans who dislike their standard of living but aren't sure if they can improve it.

Retail Shopping: They occasionally splurge on a concert or trip to a casino or racetrack. However, they lack the discretionary income for regular movies or nights out. Outdoor exercise might include fishing, water skiing, and camping trips. Dinner out is to fast-food chains or buffets. They patronize discount and dollar stores. They will buy some electronics to enhance television viewing, but shy away from the newest technologies. They will also buy sports memorabilia. They shop discount, dollar, and value stores, and are loyal to American-made products.

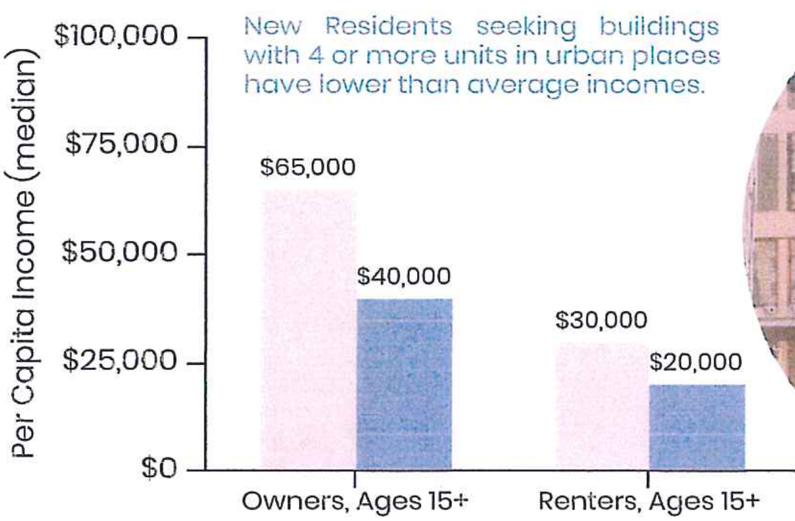
Section G

Migration & Movership Rates

Movership Rates | MICHIGAN

Average movership rates and household incomes for the State of Michigan.

Per Capita Income, Movers Ages 15+
Existing v. New Residents



- Moving Within - All building formats.
- In-Migration - Seeking buildings with four or more units in urban places.

Income of Migrating Households – Housing affordability, attainability, and tolerance are important topics that must be addressed within each unique place. Measures of affordability are usually aligned with HUD's Low-Moderate-Income (LMI) standards, with parameters for 80% or less of Area Median Income (AMI). Attainability softens the rules to include units that are priced just below, at, or slightly above market rates. Tolerance recognizes that shifts in supply and demand can results in price jumps that residents might tolerate – even if they are over-burdened by HUD's standards.

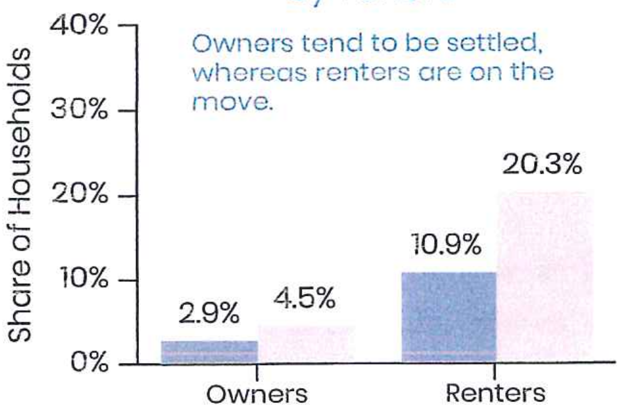
Regardless of these varying standards, migrating renters tend to have half the income of owners. Furthermore, new residents (and households) migrating into Michigan have lower incomes than those who are established. Statewide, there is a need for more income-integrated choices across all building formats, including townhouses or high-rise lofts that are traditionally marketed as "luxury" units.

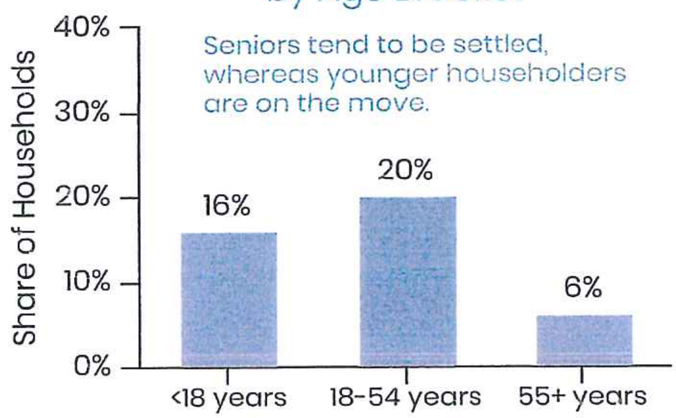
Underlying data based on tax filings as reported by the Internal Revenue Service (IRS) through 2016.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Land Bank, 2018.

LandUseUSA
UrbanStrategies

Movership Rates | MICHIGAN

Average movership rates by tenure and age for the State of Michigan.





In-Migration of New Households
Movership of Existing Households

*For the Head of the Household

Movership by Tenure - Renters are four times more likely to move than home owners. Home owners are more inclined to choose detached houses in rural settings, and they tend to be quite settled. Migrating renters across Michigan will turn over (rotate) the existing rental stock every 3 years. In comparison, it will take at least 7 years for migrating home owners to turn over the stock among detached houses. Said another way, it is renters who generate most of the market potential for the development of attached units in urban places. Caution is recommended against over-planning and over-building attached formats (like new townhouses and lofts) for owner-occupied households, unless they are clearly supported by market demand.

Movership by Origin – About half of all households moving in Michigan each year are actually new residents for the state; and the other half are moving from one address to another within the state. In any given year, almost 11% of all renters have migrated into Michigan from other places, and over 20% have moved within (unadjusted for out-migration). Within each unique place, in-migration should be used as a basis for calculating the minimum market potential (the "conservative scenario"). In comparison, total migration (in-migration plus internal migration) should be used only to estimate the maximum market potential (the "aggressive scenario").

Movership by Age – Stakeholder discussions about housing often gravitate toward the topic of Michigan's aging residents. The theory is that senior households are gaining as a share of total, and that they are seeking low-maintenance "age in place" formats like patio homes, courtyard cottages, and townhouses. In reality, seniors still represent a relatively small group; and they tend to be very settled in their detached houses.

Only 6% of all senior-headed households move each year, compared to 20% among younger households. Used as a basis for calculating market gaps, the data consistently shows that the need for new "age in place" choices is relatively small. Instead of building new senior developments, there is a greater need to improve and modifying existing houses to be barrier-free; deliver new services to seniors in their existing homes; and build new formats that appeal to single renters of all ages.

Underlying data based on tax filings reported by the Internal Revenue Service (IRS) through 2016.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Land Bank, 2018.

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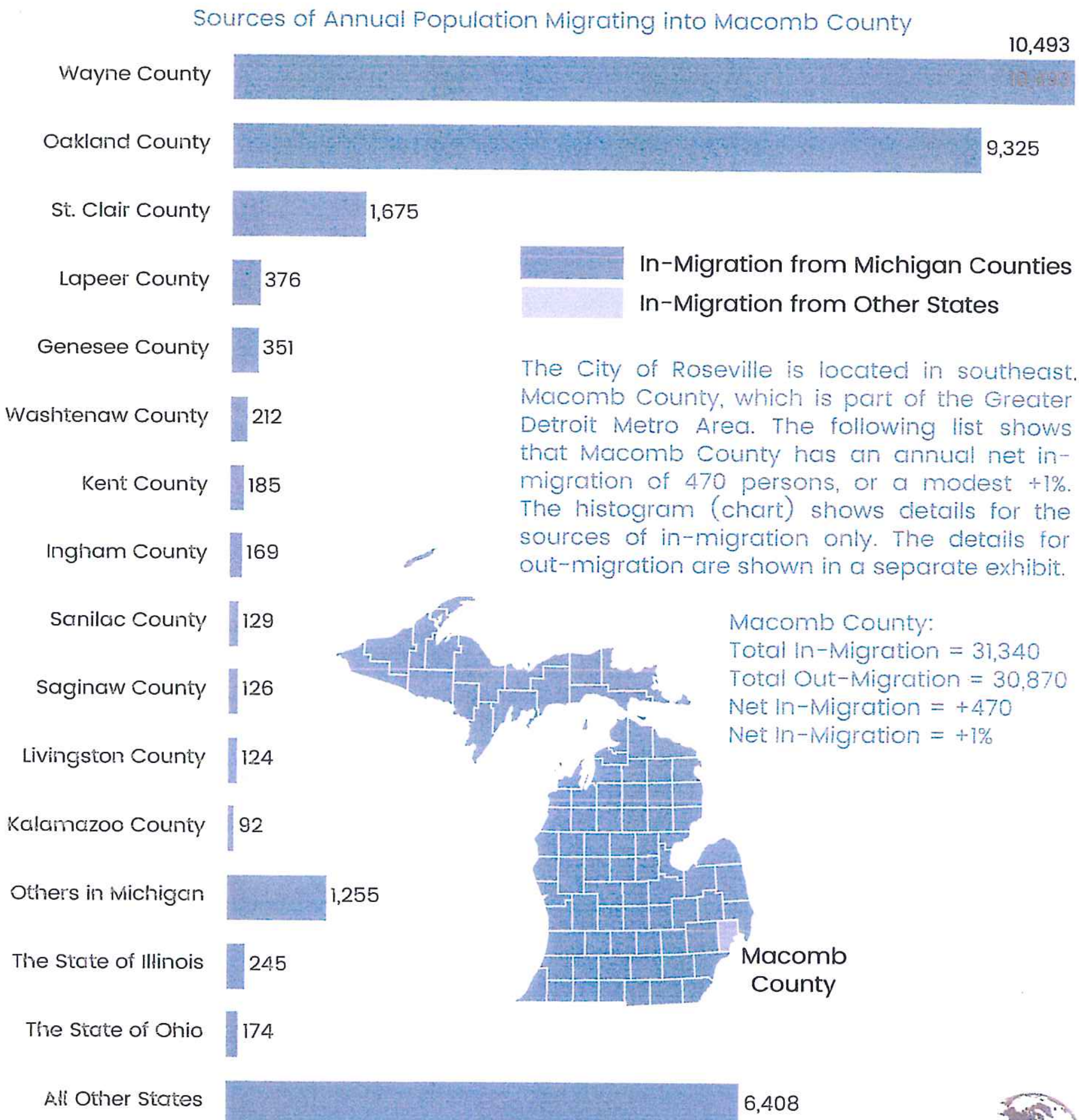
In-Migration | Macomb County

Total population migrating into the county each year, unadjusted for out-migration.



The City of Roseville is located in southeast Macomb County, which is part of the Greater Detroit Metro Area. The following list shows that Macomb County has an annual net in-migration of 470 persons, or a modest +1%. The histogram (chart) shows details for the sources of in-migration only. The details for out-migration are shown in a separate exhibit.

Macomb County:
Total In-Migration = 31,340
Total Out-Migration = 30,870
Net In-Migration = +470
Net In-Migration = +1%

Underlying data is based on individual tax returns as reported by the IRS, 2015-2016.
Analysis and exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Municipal League, 2018.

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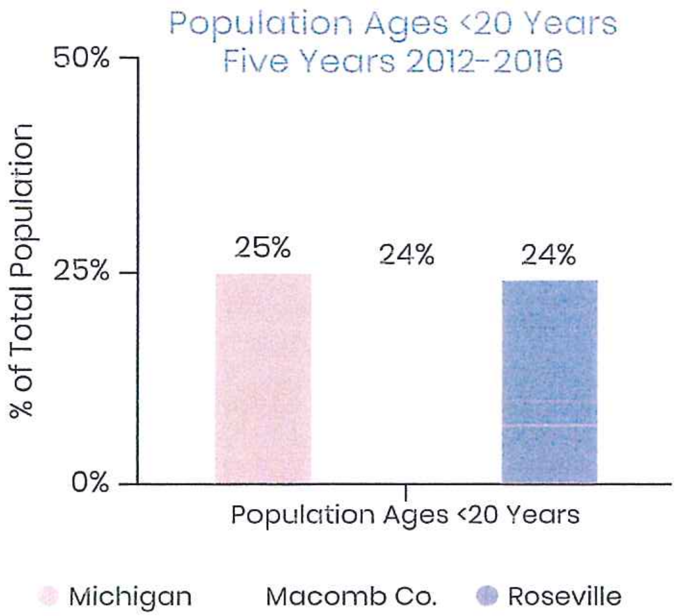
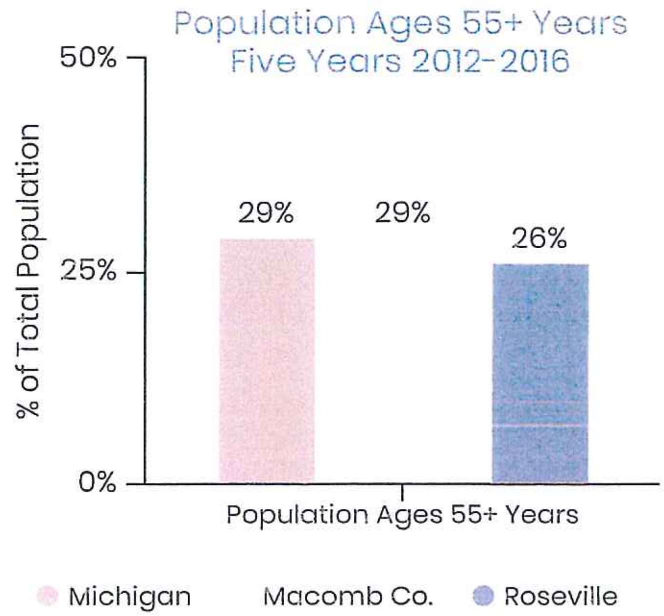
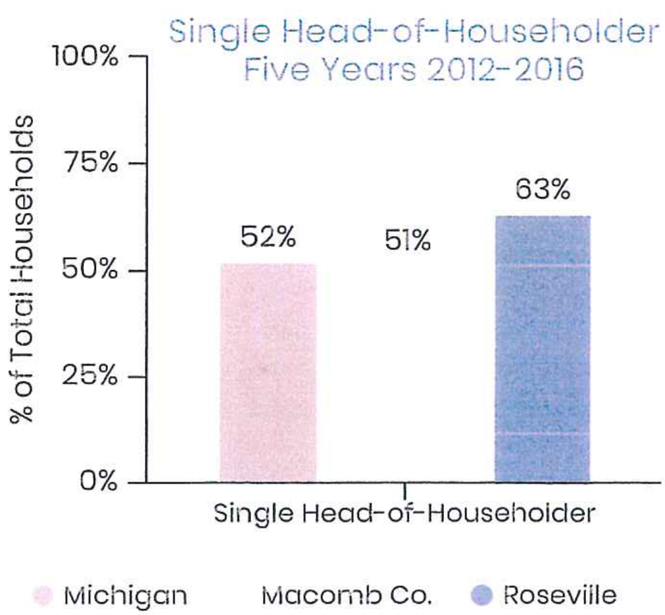
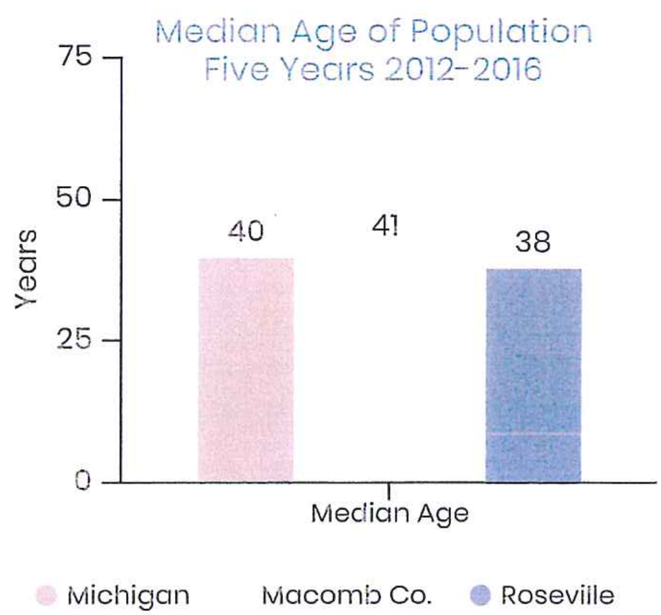
Population & Age | Roseville

A comparison of the age profiles among established resident populations.









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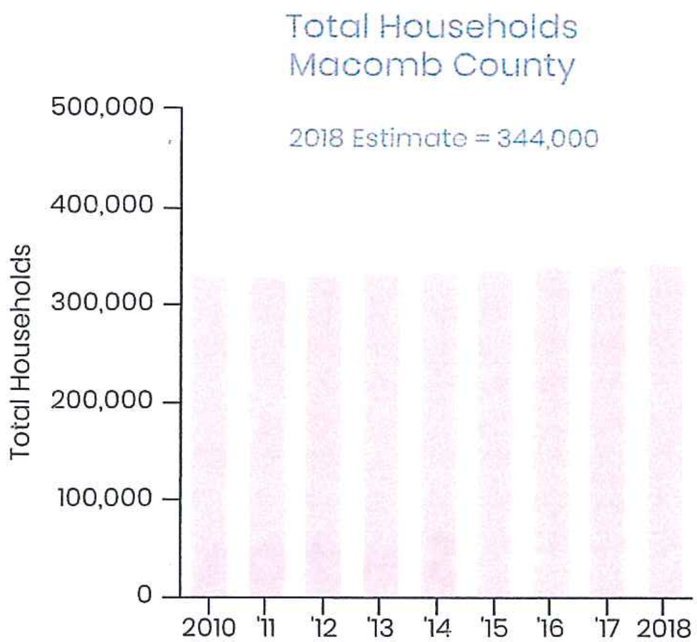
Underlying data by the Decennial Census and the American Community Survey (ACS) 2012-2016.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Municipal League, 2018.

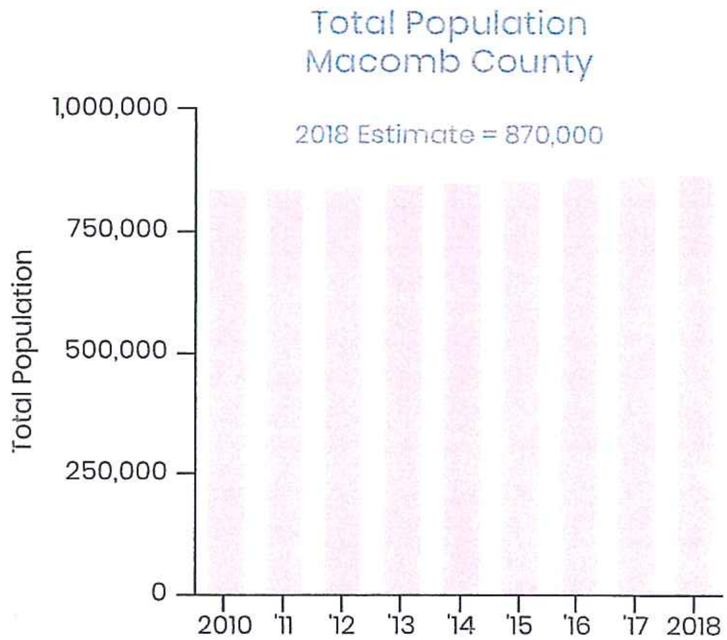
Section H

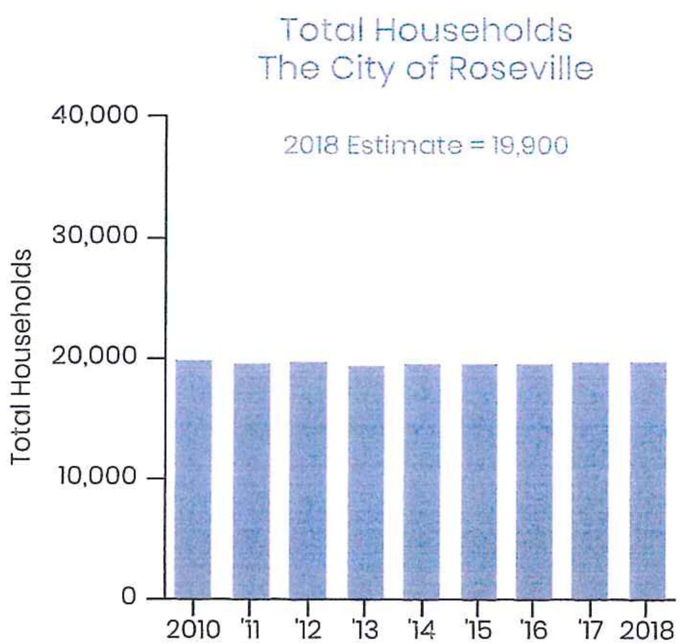
Households & Housing

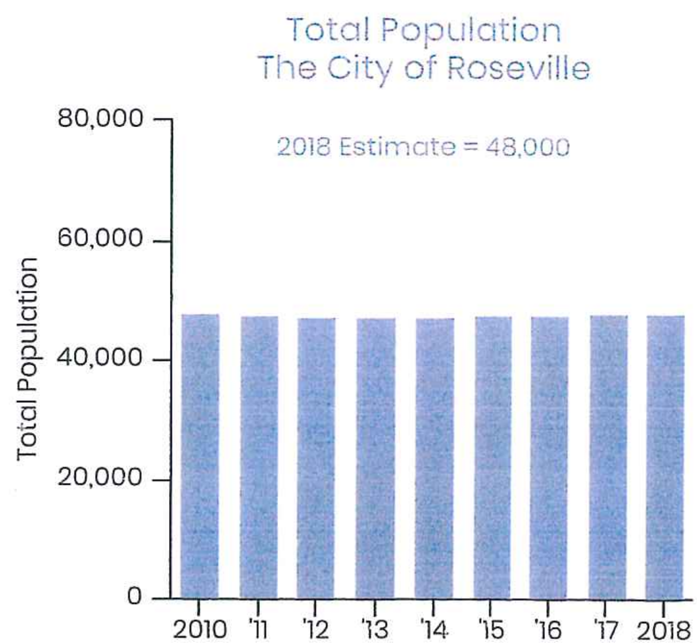
Households & Population | Roseville

A comparison of total households and population over time.







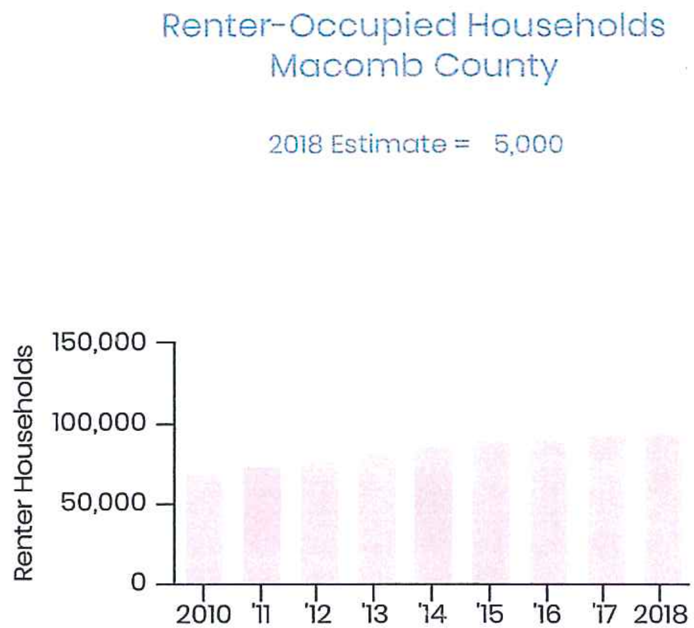


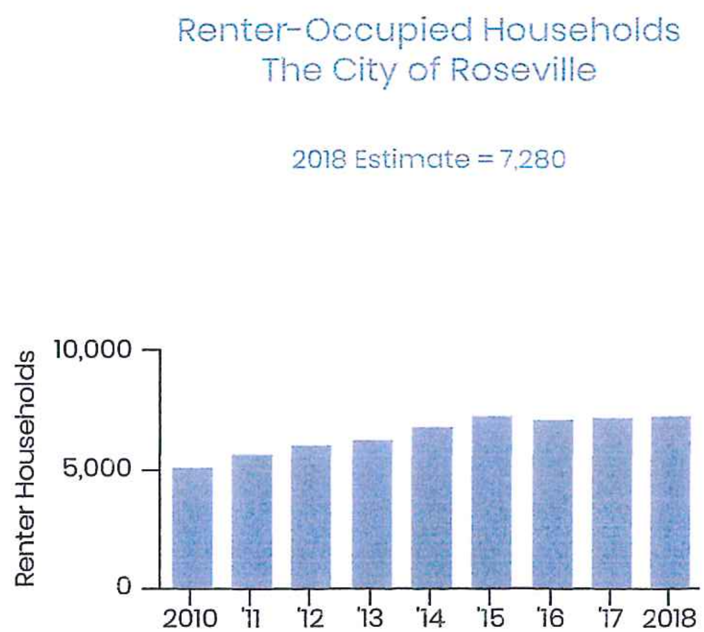
LandUseUSA
UrbanStrategies

Underlying data by the Decennial Census and American Community Survey through 2016.

Households by Tenure | Roseville

A comparison of existing households by tenure over time.





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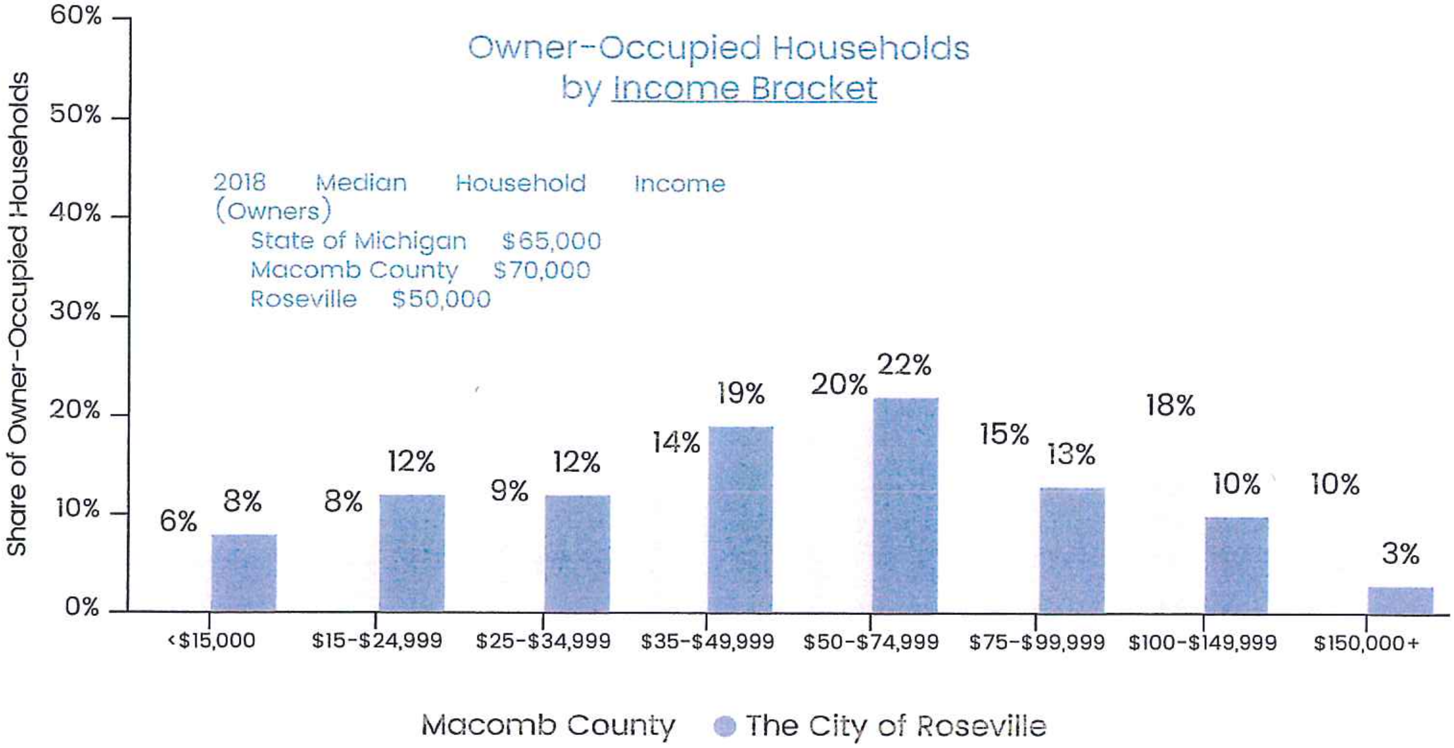
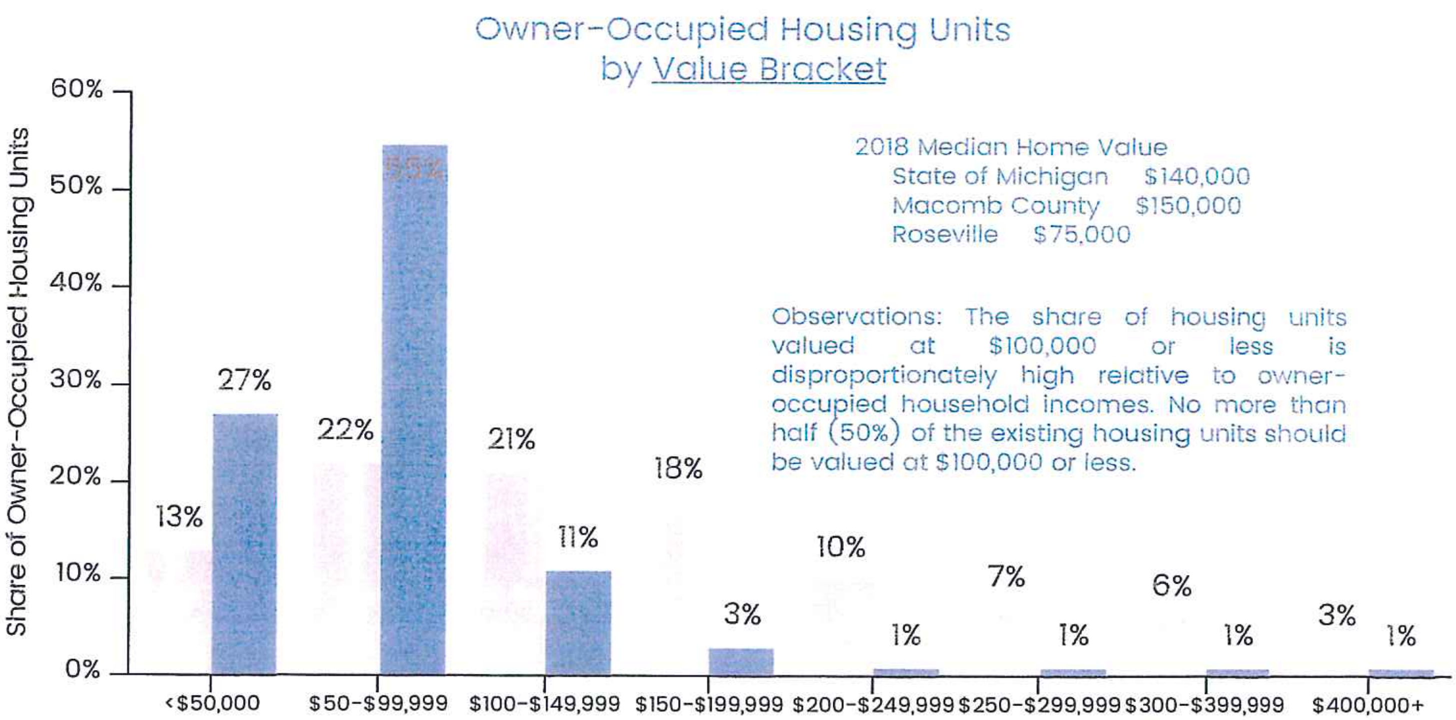
Underlying data by the Decennial Census and American Community Survey's five year estimates 2012-2016.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Municipal League, 2018.

Owner Incomes & Values | Roseville

A comparison of owner-occupied household incomes and home values.



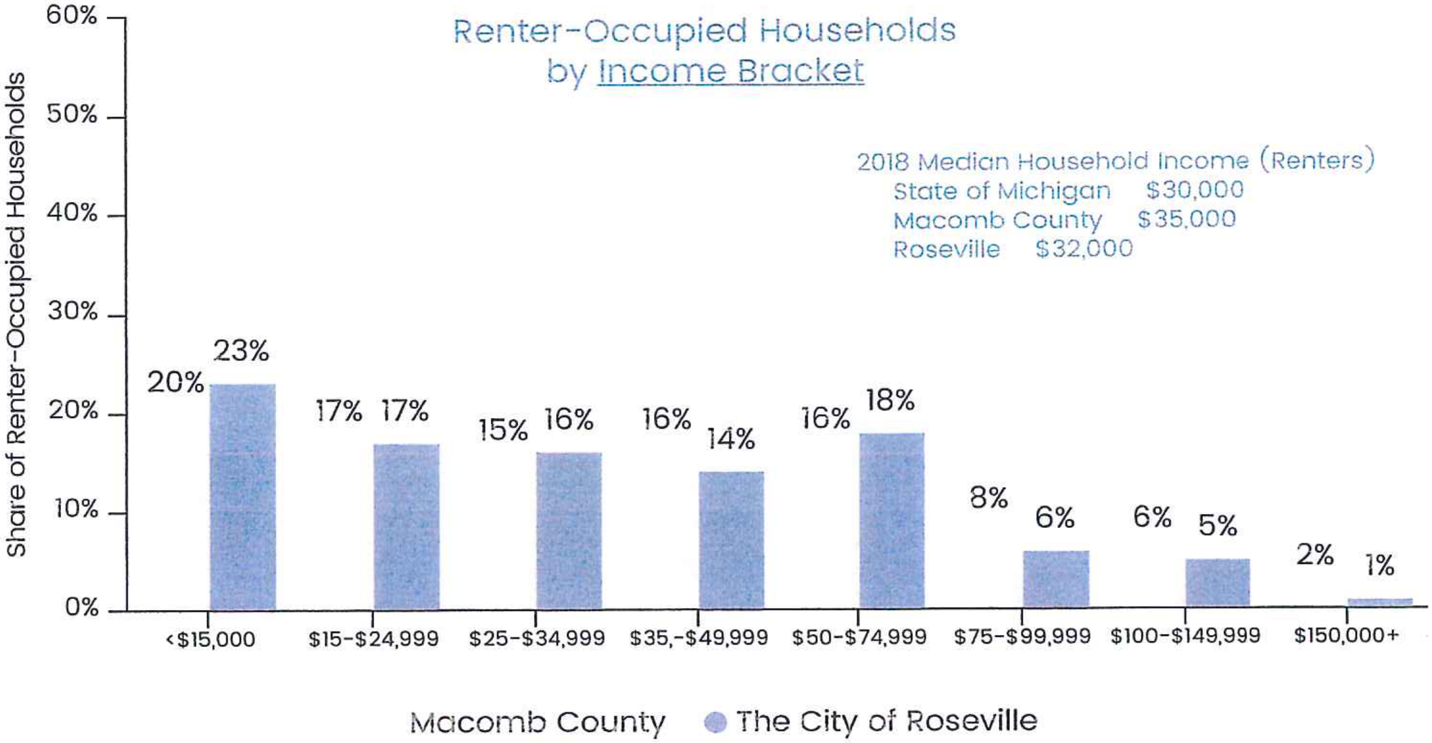


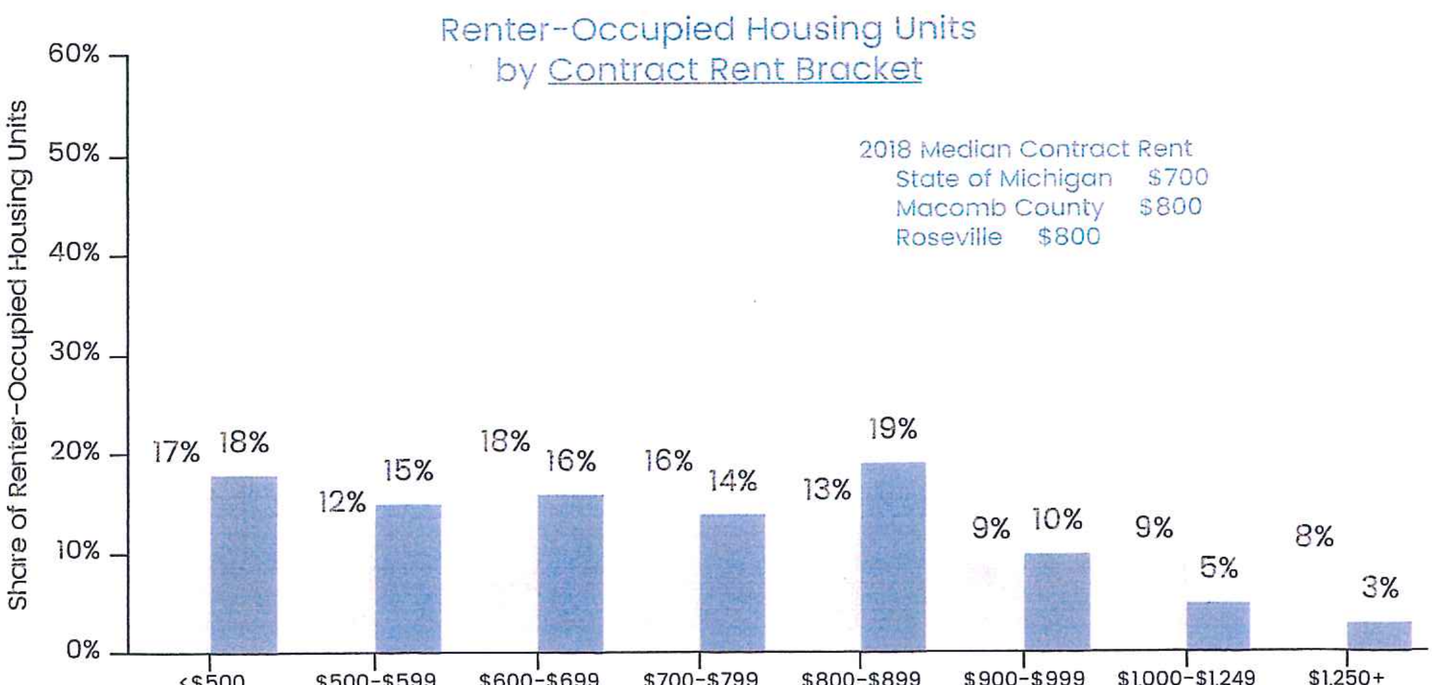
LandUseUSA UrbanStrategies

Underlying data by the Decennial Census and American Community Survey through 2016.

Renter Incomes & Prices | Roseville

A comparison of renter-occupied household incomes and contract rents.



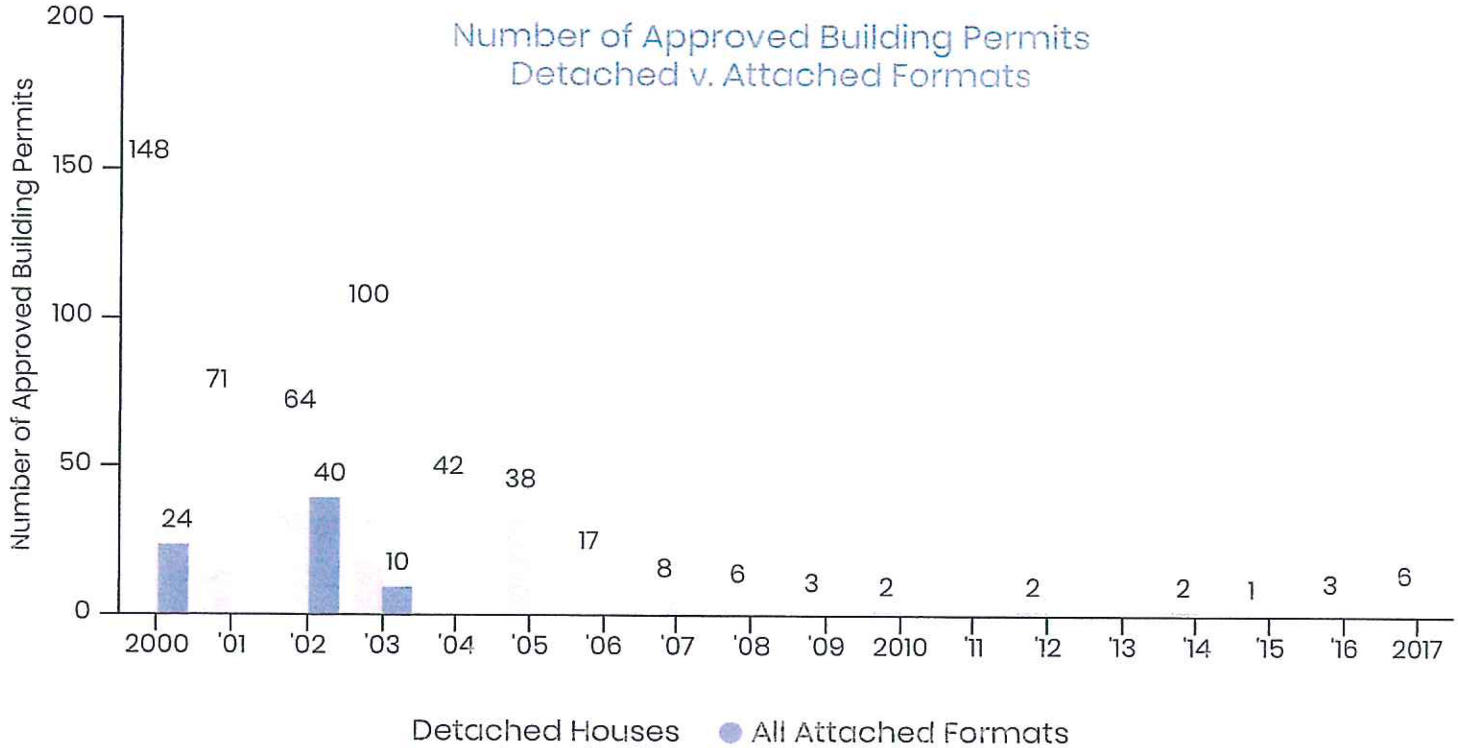


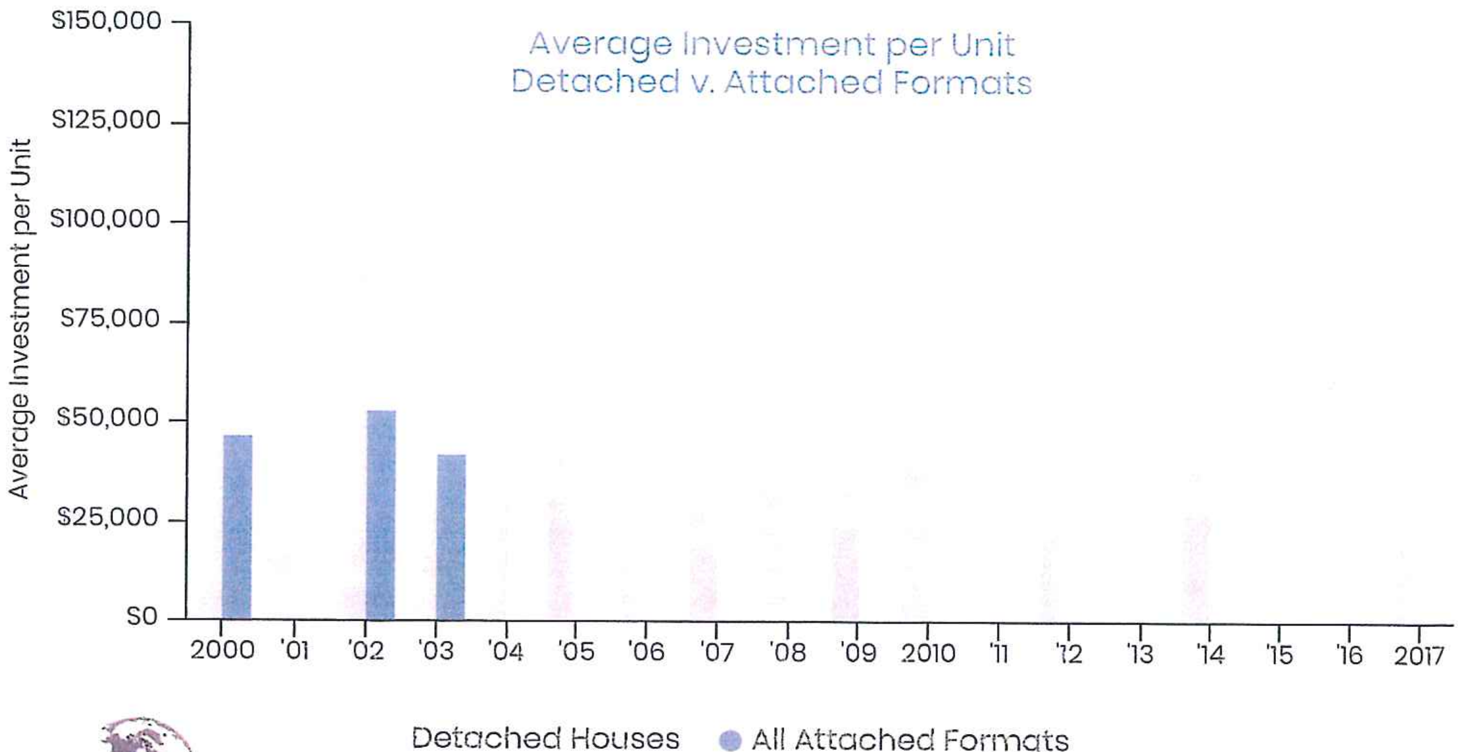
LandUseUSA
UrbanStrategies

Underlying data by the Decennial Census and American Community Survey through 2016.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Municipal League; 2018.

Building Permit Survey | Roseville

An assessment of approved building permits and investment per unit over time.



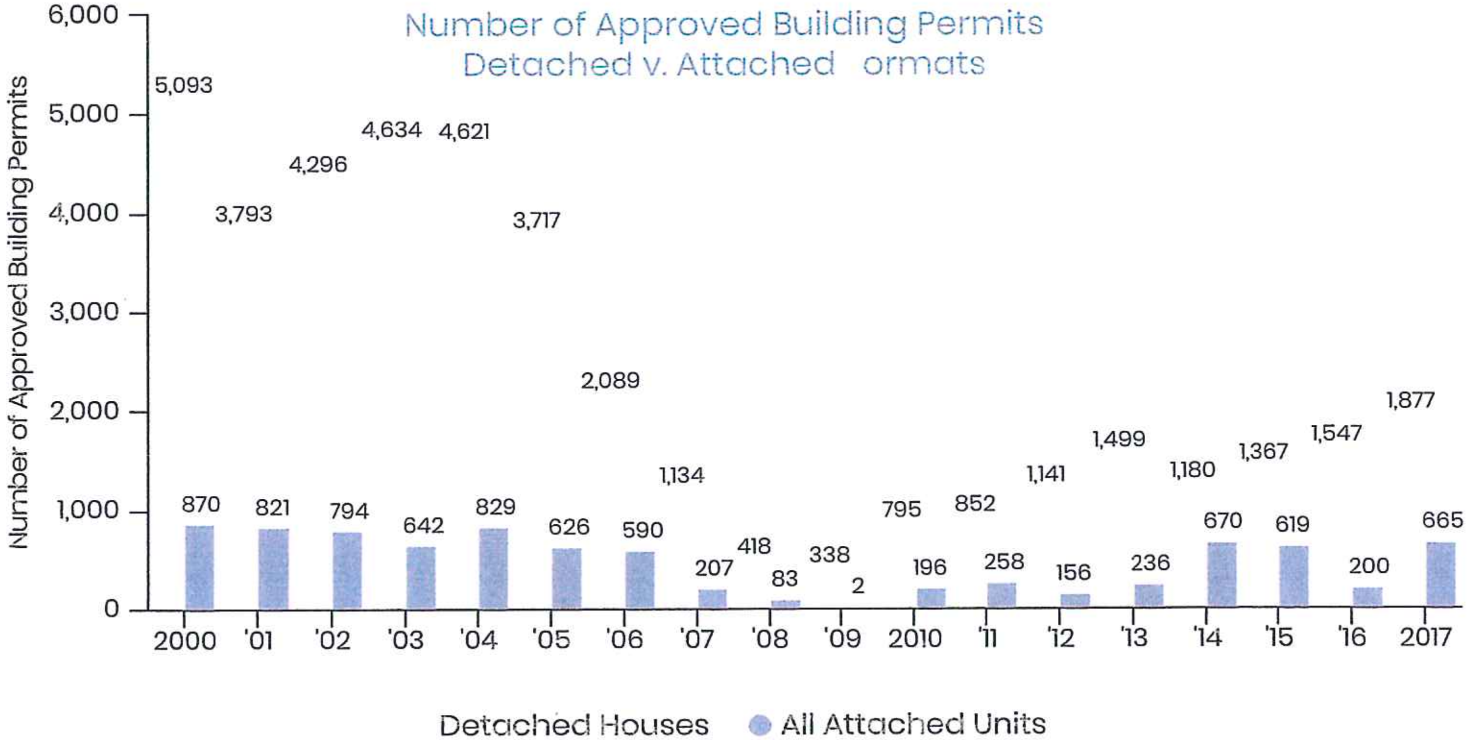


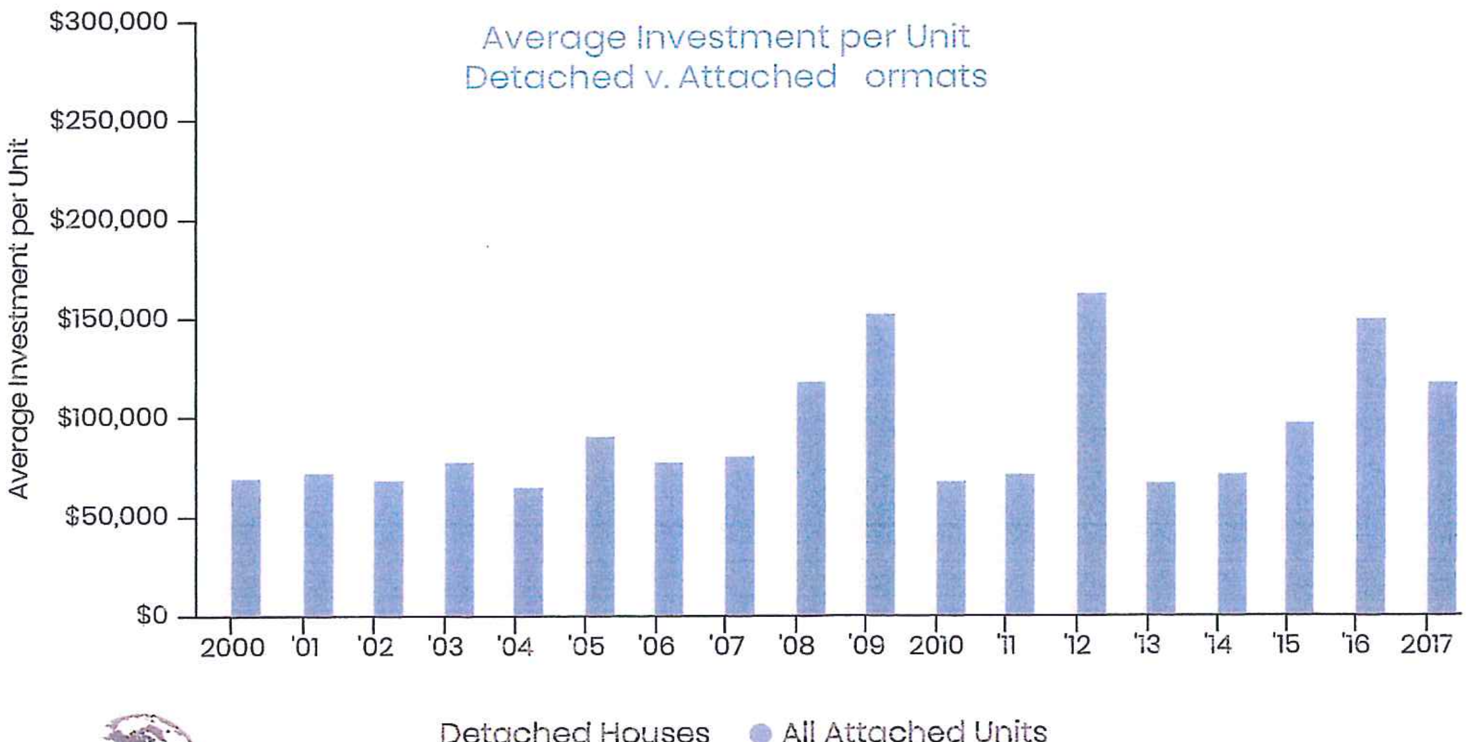
LandUseUSA
UrbanStrategies

Underlying data by the Census Bureau's Building Permits Survey through the year 2017.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Municipal League; 2018.

Building Permit Survey | Macomb County

An assessment of approved building permits and investment per unit over time.





LandUseUSA
UrbanStrategies

Underlying data by the Census Bureau's Building Permits Survey through the year 2017.
Analysis & exhibit prepared by LandUseUSA, LLC © on behalf of the Michigan Municipal League; 2018.

LandUseUSA

Sharon Woods, CRE

Sharon Woods is the founding Principal and CEO of LandUseUSA, and is a certified Counselor of Real Estate (CRE). She has over 25 years of professional experience in market research, location analysis, land use economics, and downtown revitalization. She has also built a new approach to Target Market Analysis that measures the market potential for new housing formats and retailers based on the lifestyle preferences of migrating households.

Sharon's expertise in real estate consulting, downtown reinvestment, and smart land use has led her to projects across the entire United States, and in a wide range of disciplines and roles. Her career includes senior positions at Fortune 500 retail corporations, in the field of market research and analysis. These jobs involved living and working in downtown Minneapolis (Target), downtown Cincinnati (Macy's), and downtown Detroit (General Motors). Those experiences helped fuel Sharon's passion for downtown districts as vibrant places for living, working and playing.

Accomplishments

- Approval by the State of Michigan to serve as a contractor on TMA projects under the Place-based Planning Program, for completion of TMA studies across most of Michigan.
- Development of a new approach to target market analysis based on the lifestyle preferences of migrating households. Completion of nearly 100 target market analysis studies.
- Delivery of over 100 conference presentations, tutorials, and workshops explaining the target market analysis approach, benefits, and implications for planning and development.
- Real estate counseling on 300+ projects across the nation and in diverse industries that include housing, retail, economic growth, and downtown development.
- Development of over 100 land use strategies for developers across the nation, from Alaska to Puerto Rico.
- Tenure in senior positions while working for Fortune 500 retail corporations in downtown Minneapolis, Cincinnati, and Detroit.
- Development of over 200 location strategies for retailers in nearly every state, from California to Maine.
- Development of national acquisition strategies for retailers throughout the United States and Canada.

National affiliations

Counselors of Real Estate | CRE
American Planning Association | APA
Nat'l. Trust Historic Preservation | NTHP
Congress for New Urbanism | CNU

State affiliations

Michigan Assoc. of Planning | MAP
Michigan Downtown Assoc. | MDA

Advanced education

Miami University | MU
Master's Degree | 1990
Geography | Urban Planning
Summa Cum Laude

University of Wisconsin | UW
Bachelor's Degree | 1988
Geography | Urban Planning

Continuing education

Form Based Codes Institute | FBC
National Charrette Institute | NCI
Master Citizen Planner | MCP

Fortune 500 retailers

General Motors | Urban Science
Location Intelligence
Downtown Detroit | Michigan
Senior Manager | 2001 – 2002

Sears Holdings | Kmart Corporation
Real Estate Market Strategies
The City of Troy | Michigan
Director | 2001 – 2002

Macy's, Inc. | Federated Dept. Stores
Market Research and Analysis
Downtown Cincinnati | Ohio
Senior Manager | 1993 – 2000

Target Corporation | Dayton-Hudson
Area Research, Location Intelligence
Downtown Minneapolis | Minnesota
Senior Market Analyst | 1990 – 1993

LandUseUSA

Downtown Market Strategies

LandUseUSA specializes in Downtown Market Strategies, which often begin with conventional supply-demand and gap analyses, and may be supplemented by a Target Market Analysis approach. Your downtown market strategy can be customized to address any mix of land-use categories, including housing, retail, services, recreation, and entertainment venues. The analysis can also applied to urban corridors, business improvement districts, and other special study areas. Our studies are often used with town planning, master plans, and subarea plans to build a downtown vision for the future.

Methods and Industry Intelligence

- Competition and Supply Inventories
- Supply-Demand and Gap Modeling
- Location Analysis and Site Optimization
- Site Feasibility, Highest and Best Use
- Tenant Strategies and Mixed-Use
- Sales and Revenue Forecasting
- Economic Growth Strategies
- Business Recruitment Strategies
- Support for Master Plans, Subarea Plans
- Implications for the Placemaking Process
- Analysis of Local PlaceScores™

LandUseUSA

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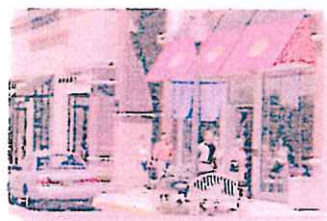
Website	www.LandUseUSA.com

LandUseUSA

Services Overview

Professional consultants specializing in real estate consulting, place-based Target Market Analysis (TMA), Downtown Market Strategies, and Land Use Economics. Services are customized for each unique project and place, and backed by intelligence on the preferences of retailers, tenants, shoppers, and residents. Our clients include communities, urban and town planners, and private developers. We help planning firms demonstrate the economic viability of master plans. We also help developers identify investment opportunities and optimal land uses. And, we help downtowns identify their optimal mix of merchants and tenants. Our experience is coast-to-coast, from Alaska to Puerto Rico; and from California to Maine.

Residential Target Market Analysis
Housing strategies matched with lifestyle preferences of migrating households.



Retail Target Market Analysis
Retail strategies matched with shopper and visitor preferences.

Residential Market Strategy
Diverse housing formats by tenure, size, rents, and amenities.

Downtown Market Strategy
Mixed uses and Placemaking to activate Main Streets and downtown districts.

Economic Growth Strategy
Diversification for new industries, skilled jobs, and revenues.

Retail Market Strategy
Merchants, optimal tenants, destination stores, and retail formats.

LandUseUSA

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