

Downtown & Grand River Avenue
Retail Market Analysis
City of Brighton, Michigan



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City of Brighton Downtown Development Authority

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INTRODUCTION



Figure 1: The City of Brighton's DDA area includes a broad range of commercial and residential development clusters located along the Grand River Avenue corridor and the downtown Main Street (View looking east).

Executive Summary

This study analyzes the retail market potential for the Brighton DDA study area (“downtown Brighton”). Downtown Brighton offers an attractive, walkable and historic downtown that is unique to Livingston County and the western Oakland County region. The downtown’s stores and restaurants greatly benefit from its prime location near the intersection of two major highways and being at the crossroads of Oakland, Livingston and Washtenaw counties. Several residential developments in the area are nearing completion, and as a result over 1,500 upscale young professionals and empty nesters will soon be moving into 750 new multi-family dwellings in the heart of downtown. The infusion of these new residents, as well as the downtown’s new streetscape plan, will help make downtown Brighton an even more competitive shopping and dining destination

Downtown Brighton’s existing retail and restaurant variety, building stock, public realm, parking and management is meeting or exceeding the shopping and dining expectations of approximately 60 percent of its trade area’s households. Under existing conditions, downtown Brighton’s retailers and restaurants can capture up to \$16.8 million annually in additional sales, potentially increasing to up to \$17.6 million in new annual sales by 2026. If achieved, this growth could support 35,000 square feet (sf) of new retailers and 15,000 sf of new restaurants, for a total of 50,000 sf. This growth could be absorbed with the opening of 15 to 19 new businesses or by existing stores and restaurants through expanded operations.

Additionally, the existing larger shopping centers situated along Grand River Avenue will represent future opportunities for redevelopment in the event they become aged or close as a result of the post-pandemic shift to on-line shopping. With progressive form-based codes and modern zoning, these older commercial properties can be repurposed into walkable mixed-use villages or employment centers that could attract more residents and corporations seeking to relocate their regional headquarters to rural, emerging areas near walkable downtowns.

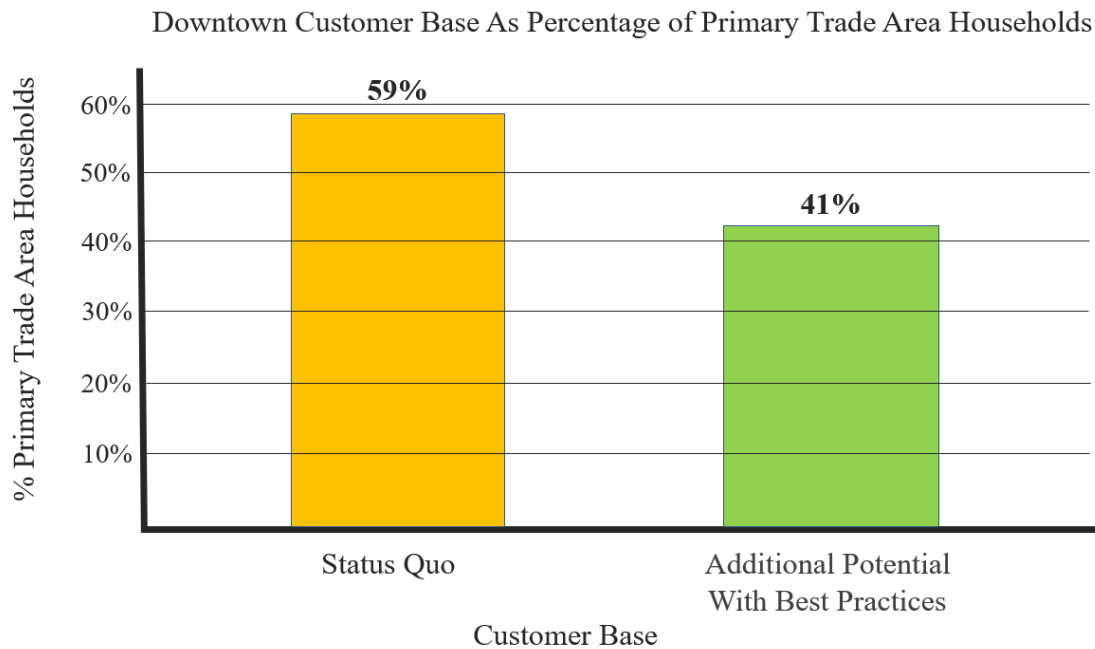


Figure 2: Under existing conditions, downtown Brighton’s customer base comprises of roughly 60 percent of trade area households.

▪ **Market Potential – Best Practices**

This study has found an opportunity for downtown Brighton to widen its appeal to over 27,000 additional moderate to high income/wealth households that seek designer brands, upscale merchandise and healthy, upscale dining. Currently, these families are regularly traveling to Ann Arbor, Birmingham, Chelsea, Fenton, the Twelve Oaks Mall, Somerset Mall, Royal Oak and in some cases Detroit for many of their shopping and dining experiences. These destinations are inconvenient and 20 to 40 miles from downtown Brighton

Downtown Brighton retailers and restaurants can capture more of this affluent group’s spending by upgrading their businesses to meet the quality and maintenance standards that this group is accustomed to in their homes, neighborhoods, work environments, vacation destinations and in some cases, their country clubs. To achieve this, stores and restaurants must update their fixturing, furnishings, hours and brands to meet the industry’s best practices. Additionally, the City of Brighton’s marketing, management, parking, wayfinding, streetscape and general public realm will require some modifications and investment to meet the expectations of these roughly 27,000 households and out of town visitors.

This study also finds that if industry best practices are implemented, then as much as \$48.2 million in new annual sales could be captured by downtown Brighton retailers and restaurants by 2026. This demand could support up to 100,000 square feet (sf) of new retailers and 20,000 sf of new restaurants. This growth could be absorbed with the opening of 25 – 40 new businesses or by existing stores and restaurants through expanded operations and marketing. The 120,000 sf of additional supportable retail and restaurant space represents a 6.7 percent increase in the downtown’s existing 1.8 million sf of first floor commercial area. Furthermore, it is equivalent to 55 percent of the existing 220,000 sf of commercial space along West Main Street in downtown.

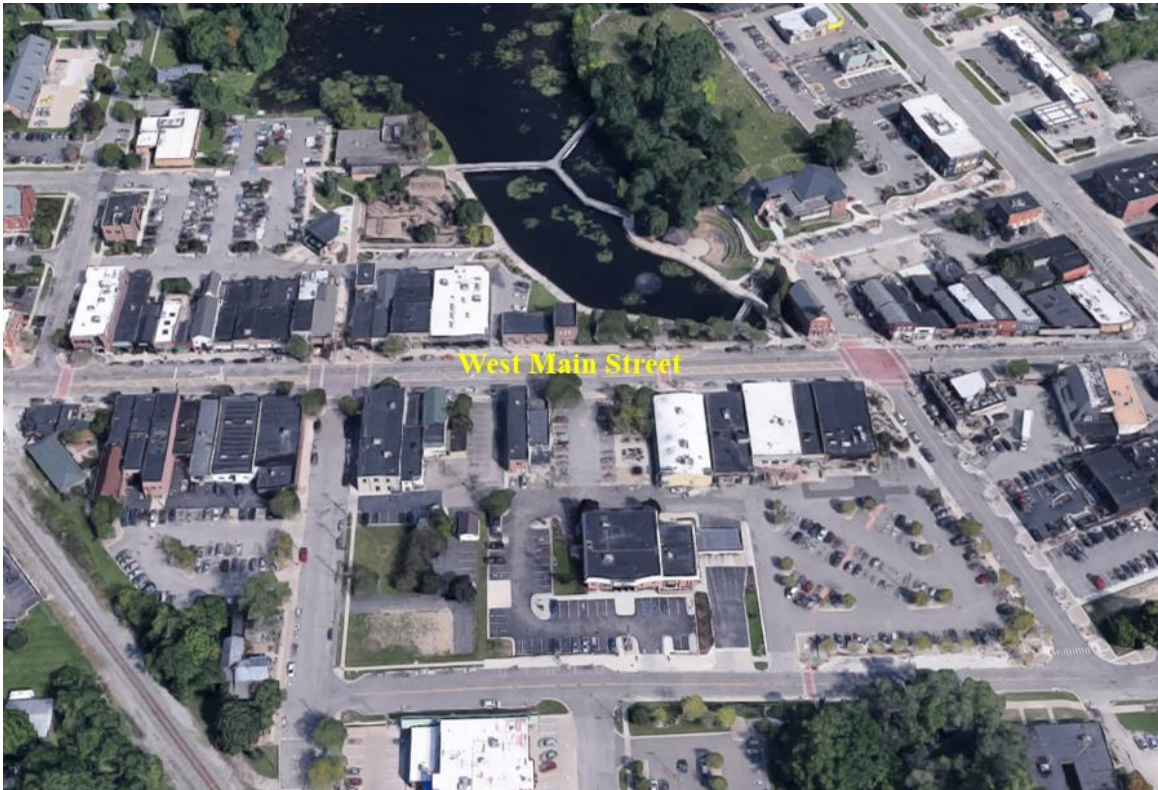


Figure 3: Birdseye view looking west of West Main Street in downtown Brighton.

Background

Gibbs Planning Group, Inc. (GPG) has been retained by the Brighton Downtown Development Authority (DDA) to conduct a retail feasibility analysis to determine how much additional retail and restaurant development (if any) is supportable within the downtown Brighton area.

GPG addressed the following issues in this study:

- What is the existing and planned retail market for downtown Brighton and surrounding areas?
- What are the potential trade areas for downtown Brighton?
- What are the population, demographic and lifestyle characteristics of downtown Brighton’s primary trade area currently and projected for 2026?
- What is the current and projected growth for retail expenditures in the area, now and in 2026?

- How much additional retail square footage is supportable in downtown Brighton and what retailers may seek to deploy a new business there?
- What retail sales volumes can potentially be achieved in downtown Brighton by these new businesses?

Methodology

To address the above issues, GPG defined a trade area that would likely serve the existing and new retail development in downtown Brighton based on geographic and topographic considerations, traffic access/flow in the area, relative retail strengths, 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 Environmental Systems Research Institute (ESRI).

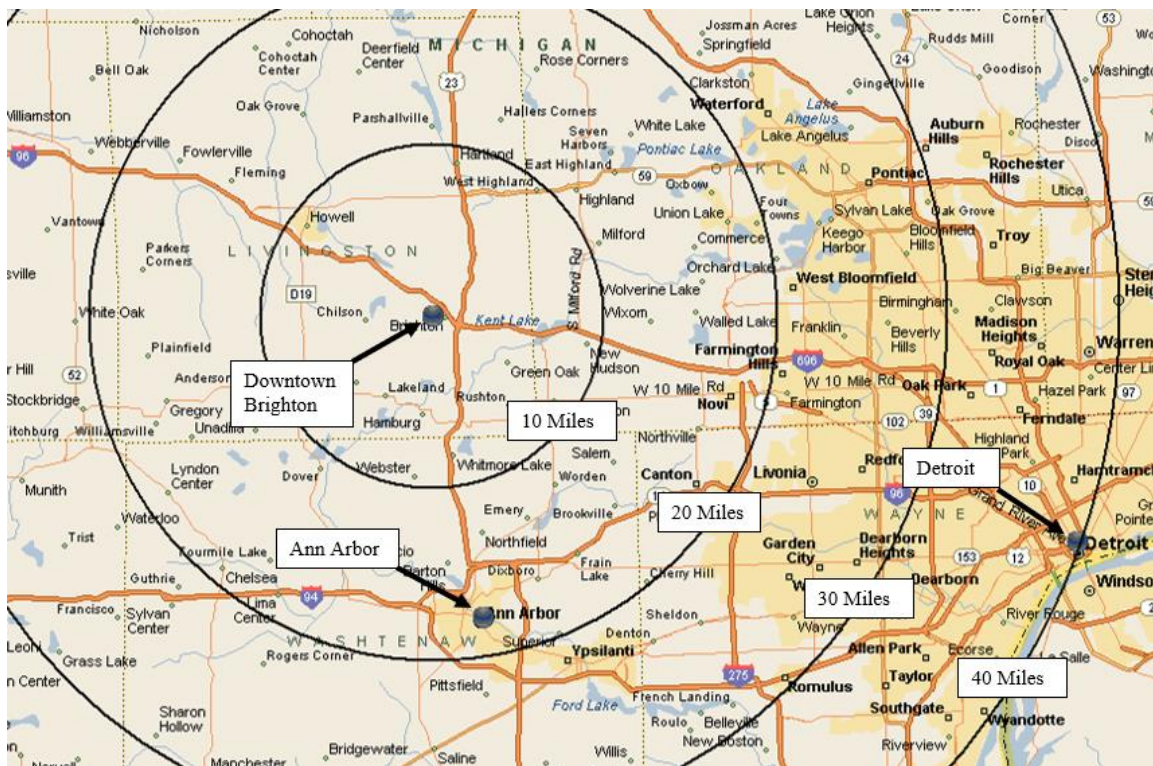


Figure 4: Downtown Brighton is in southeast Michigan, approximately 18 miles north of Ann Arbor and 40 miles northwest of Detroit.

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 existing and new commercial development. The projected net consumer expenditure capture is based on household expenditure and demographic characteristics of the trade area, existing and planned retail competition, traffic and retail gravitational patterns and GPG's qualitative assessment of downtown Brighton.

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.

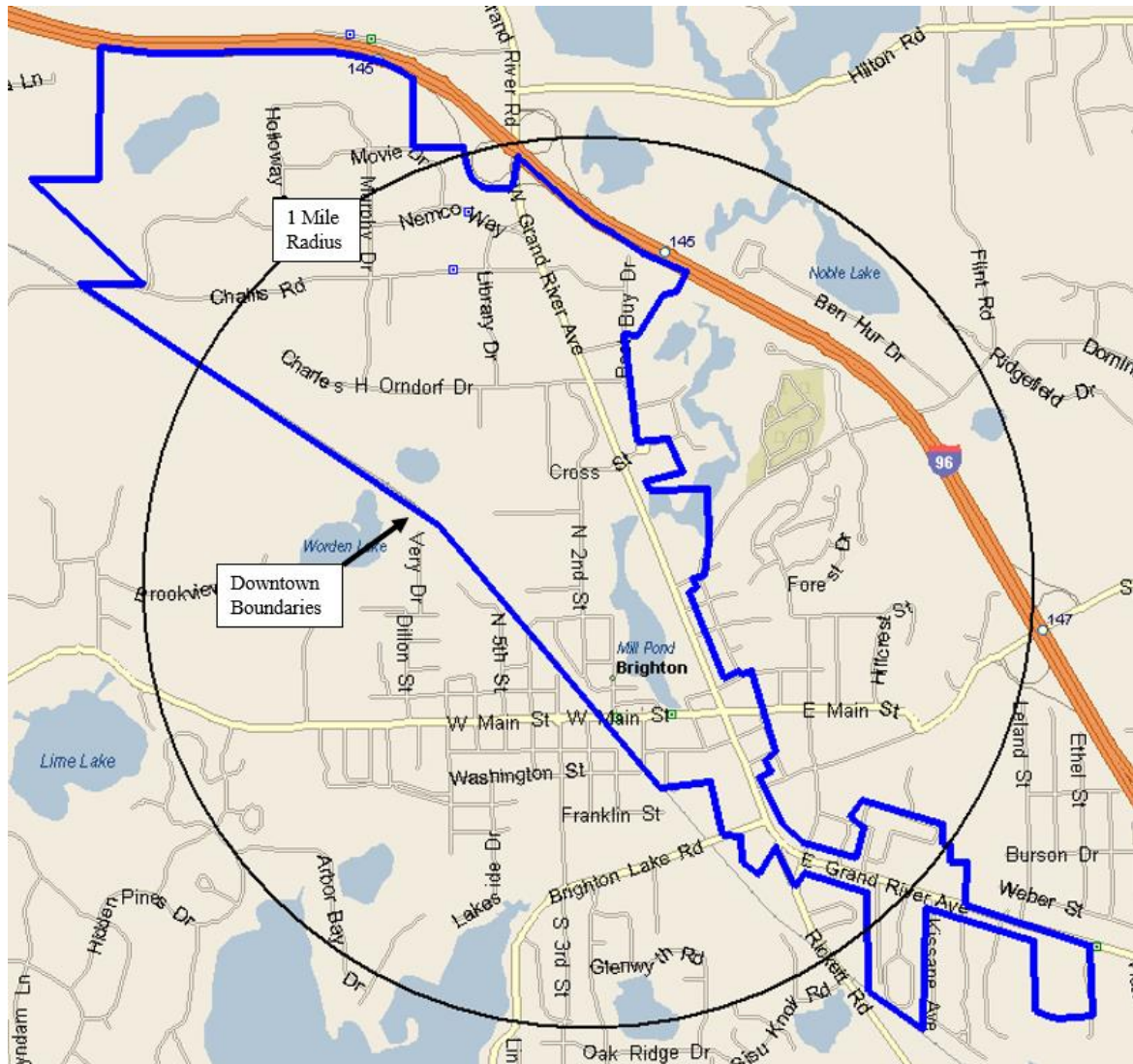


Figure 5: Map illustrating the geographic boundaries of downtown Brighton.

PRIMARY TRADE AREA

This study estimates a primary trade area for downtown Brighton based on GPG’s analysis of existing commercial centers, population clusters, employment, visitors, highway access and the retail gravitation in the market. Using data from ESRI and the U.S. Census Bureau, GPG obtained the most recent population and demographic characteristics (2021) and those projected for 2026 for the primary trade area, 5-mile radius surrounding the middle of downtown, City of Brighton, Livingston County and the State of Michigan.

The primary trade area is the consumer market where the downtown has a significant competitive advantage because of access, design, lack of quality competition and traffic and commute patterns. Downtown Brighton’s primary retail trade area includes 178,300 year-round residents and covers roughly 415 square miles of area. By 2026, the primary trade area’s population is estimated to grow by 7,700 people, or 0.85 percent annually. This growth rate is higher than that for the 5-mile radius surrounding the center of downtown, City of Brighton and State of Michigan. Over the next five years, the number of households in the primary trade area will increase from 68,000 to 71,300 and will include an average of 2.60 people per household.

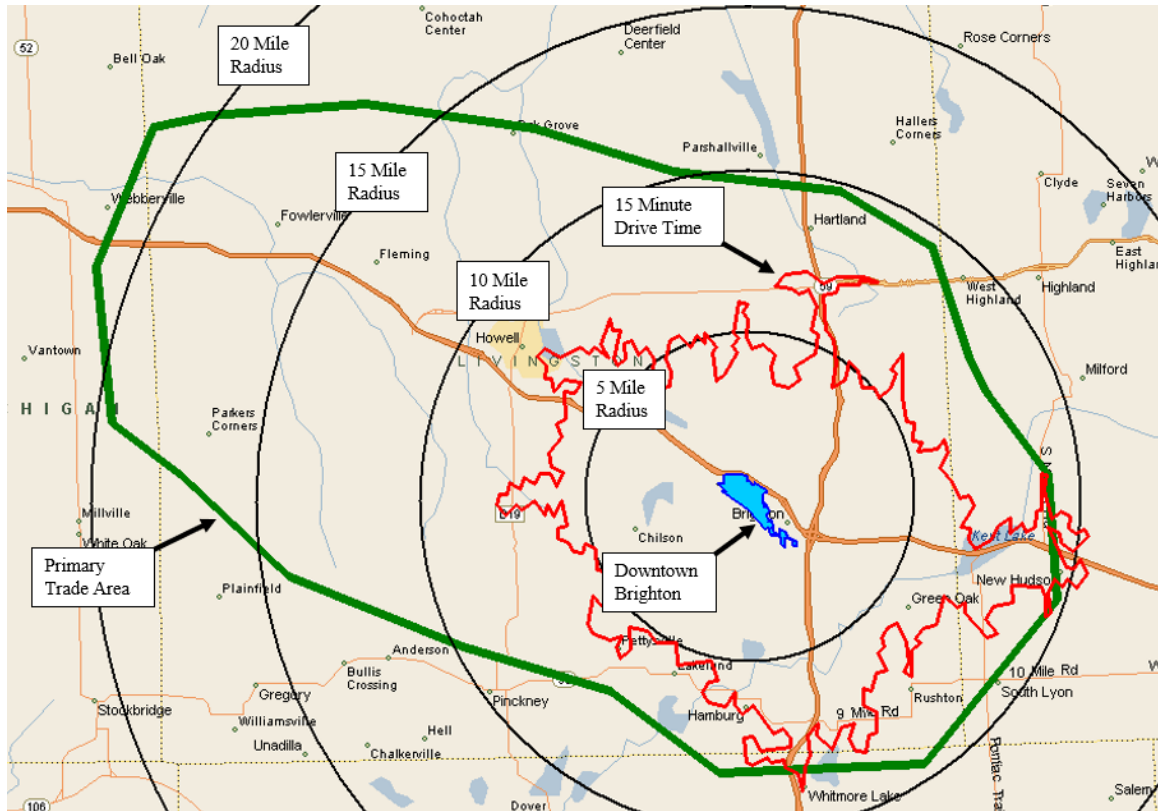


Figure 6: Downtown Brighton’s estimated primary trade area is shown above inside the green line and the 15-minute drive time inside the red line

The median household income in downtown Brighton’s primary trade area is \$83,400 and is expected to increase to \$88,700 by 2026. Its average household income is \$106,700, and over 55 percent of households earn over \$75,000 per year – higher than that for the City of Brighton and State of Michigan, but lower than for the 5-mile radius surrounding the center of downtown and Livingston County. Over 38 percent of the trade area’s residents over the age of 25 have earned a bachelor’s degree or higher, which is a higher graduation rate than for the county and state. Residents living in the primary trade area have a median age of 42.5, which is 1.9 years older than the median age of the state.

Approximately 93.3 percent of the primary trade area homes are occupied, and the median home value is estimated to be \$246,700. Of all the primary trade area’s housing units, 79.7 percent are owner-occupied, a number that has increased 1.8 percent since 2010 and is expected to remain

constant through 2026. Renter-occupied households have decreased from 14.9 percent in 2010 to 13.7 percent in 2020 and are expected to remain constant through 2026.

The primary trade area’s current residential vacancy rate is 6.7 percent, a number that has decreased 0.5 percent since 2010 and is projected to remain constant through 2026. The percentage of housing units valued at over \$250,000 is expected to increase from 48.7 percent to 55.7 percent – coinciding with an increase in the median home value to \$265,600 by 2026.

The following borders approximately delineate downtown Brighton’s primary trade area (See Figure 6):

- North – Chase Lake Road, Hazard Road & Clyde Road
- South – Whitmore Lake, Bass Lake, Putnam Lake & Wasson Road
- East – Durham Lake, Camp Dearborn & Milford Road
- West – Searls Road & Herrington Road North

Figure 7: Downtown Brighton Demographic Comparisons

<i>Demographic Characteristics</i>	<i>Primary Trade Area</i>	<i>5-Mile Radius</i>	<i>City of Brighton</i>	<i>Livingston County</i>	<i>State of Michigan</i>
2021 Population	178,300	54,000	8,100	195,700	10,115,000
2026 Population	186,000	56,000	8,800	203,800	10,238,500
2021-26 Projected Annual Growth Rate	0.85%	0.75%	1.55%	0.81%	0.24%
2021 Households	68,000	21,100	4,000	73,900	4,002,100
2026 Households	71,300	22,100	4,400	77,400	4,063,000
2021-2026 Projected Annual HH Growth Rate	0.94%	0.90%	1.83%	0.91%	0.30%
Persons Per Household 2021	2.60	2.54	1.99	2.63	2.47
Median Age	42.5	45.8	46.0	43.2	40.6
2021 Median Household Income	\$83,400	\$92,700	\$66,500	\$83,800	\$57,100
2021 Average Household Income	\$106,700	\$121,300	\$87,400	\$106,300	\$79,800
2026 Median Household Income	\$88,700	\$97,100	\$69,500	\$88,900	\$61,200
2026 Average Household Income	\$117,200	\$131,800	\$91,200	\$116,400	\$88,400
% Households w. incomes \$75,000+	56.3%	61.7%	45.7%	56.9%	38.5%
% Bachelor’s Degree or higher	38.4%	46.5%	42.5%	36.5%	30.1%

Figure 7: This side-by-side table compares the primary trade area demographic statistics with those of the 5-mile radius surrounding the middle of downtown Brighton, City of Brighton, Livingston County and the State of Michigan.

LIFESTYLE TAPESTRY DEMOGRAPHICS

As a part of this analysis, GPG has purchased third-party demographic research prepared by ESRI. The ESRI data includes tapestry lifestyles, which creates 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 most prevalent ESRI lifestyle groups in downtown Brighton’s primary trade area are Green Acres, Soccer Moms, Savvy Suburbanites, Middleburg and Rustbelt Traditions. With the

implementation of best practices, downtown Brighton will become more appealing to the rather affluent Soccer Moms and Savvy Suburbanites lifestyle groups.

Green Acres: The primary trade area’s most prominent lifestyle group is “*Green Acres*,” which represent 26.1 percent of primary trade area households. This is an older market, primarily composed of married couples without children. *Green Acres* residents are found in rural enclaves in metropolitan areas. They live in single-family, owner-occupied homes that tend to have substantial acreage. The median home value for *Green Acres* homes is \$235,500.

More than 60 percent of *Green Acres* residents are college educated. Their unemployment rate is low at 3.8 percent and labor force participation rate is high at 66.8 percent. Both their median household income (\$76,800) and median net worth (\$267,700) are higher than the national figures. Their income is derived not only from wages and salaries but also from self-employment (more than 13 percent of households), investments (27 percent of households) and retirement.

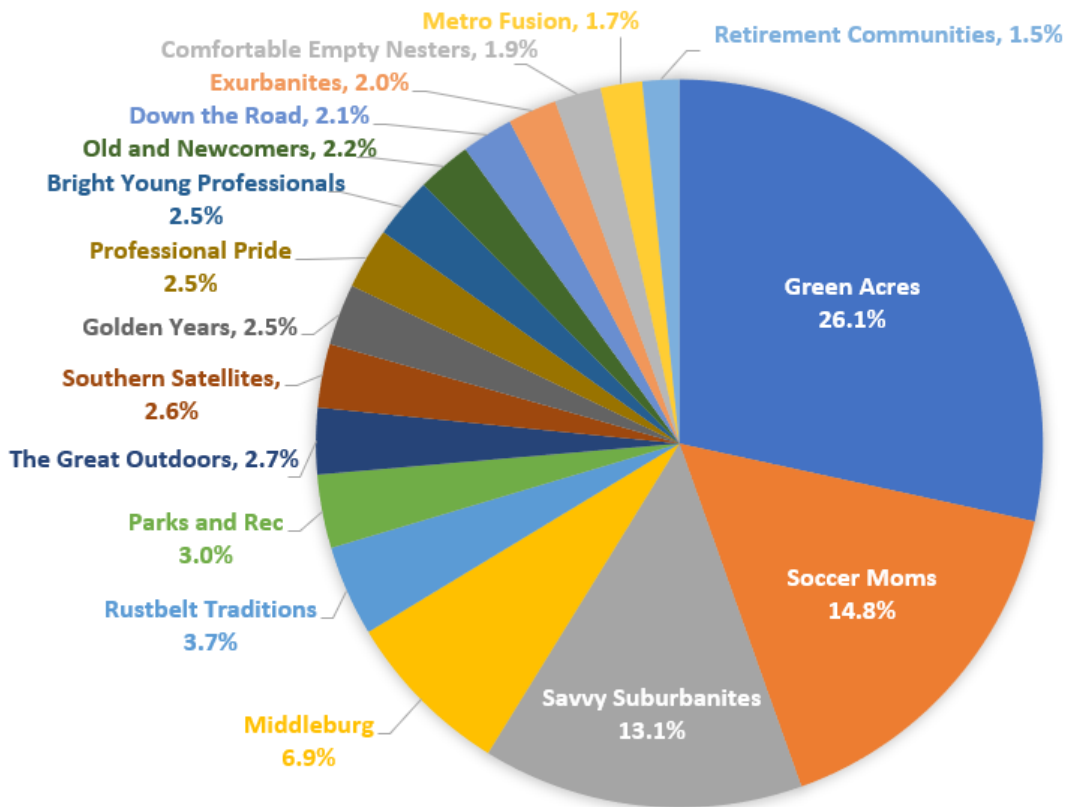


Figure 8: The relative proportions of the Tapestry Lifestyle groups found in the primary trade area.

Green Acres are cautious consumers who focus on quality and durability. Their purchasing choices reflect their country life, including a variety of vehicles from trucks and SUVs to ATVs and motorcycles (preferably late models). Although they have a rather pessimistic economic outlook, as consumers *Green Acres* are comfortable with debt, primarily as home and auto loans.

Soccer Moms: Roughly 14.8 percent (or 10,000) of primary trade area households are classified as *Soccer Moms*. These residents primarily live in single-family homes in newer neighborhoods. As their name implies, *Soccer Moms* households are composed of married couples with children. Most of these households also have 2 or 3 vehicles, as long travel times to work are common.

In terms of education, 40.5 percent are college graduates and more than 72 percent have some college education. *Soccer Moms* have a high labor participation rate (71 percent) and 2 out of 3 of these households include 2+ workers. Family-oriented purchases and activities dominate their spending, like 4+ televisions, movie purchases, children’s apparel and toys, and visits to theme parks or zoos. While home maintenance services are frequently contracted, these families also like their gardens and own the tools for minor upkeep, like lawn mowers, trimmers and blowers.

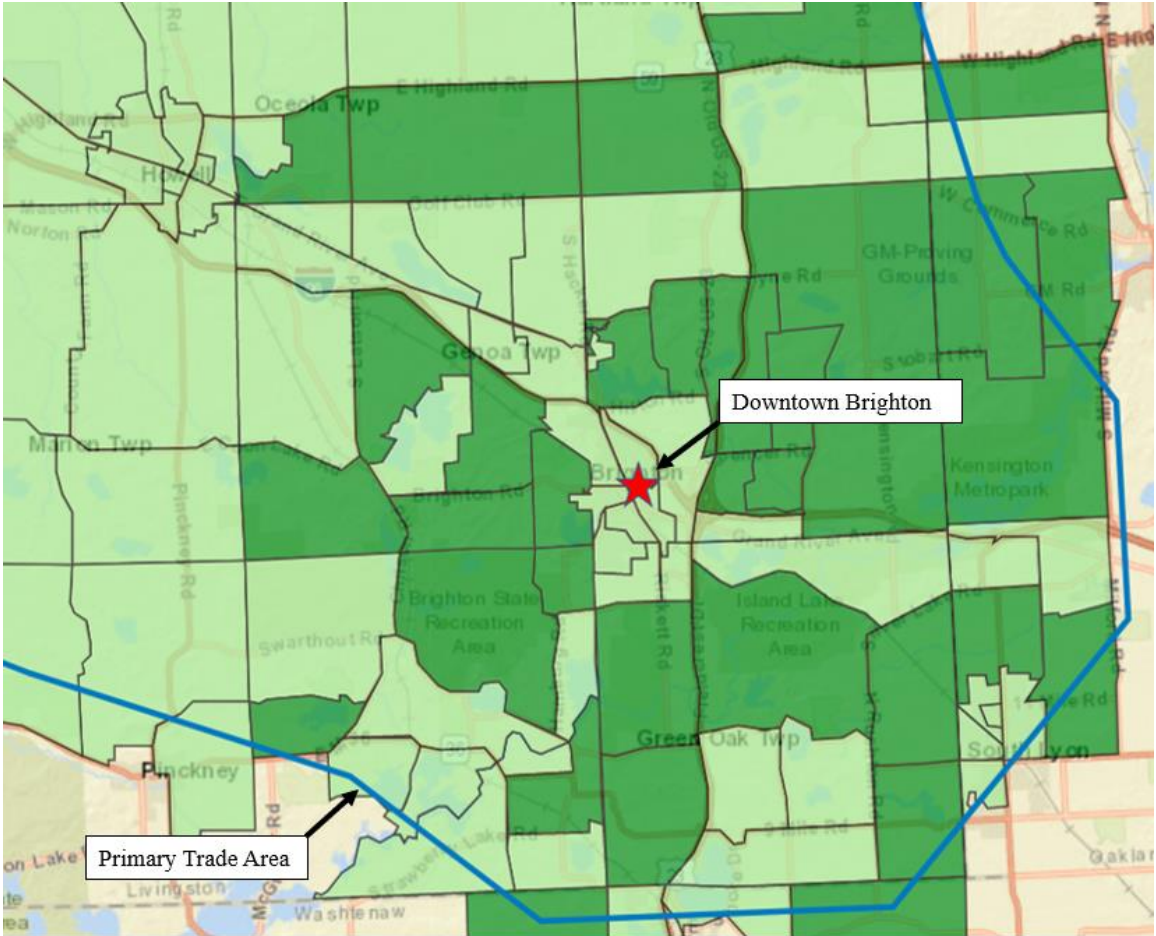


Figure 8: Map showing the median incomes around downtown Brighton. Census blocks colored in dark green have median incomes above \$100,000 a year. Downtown Brighton retailers and restaurants will be able to attract more consumers from these higher income areas if best practices are implemented.

Savvy Suburbanites: Approximately 13.1 percent (or 2,800) of primary trade area households are defined as *Savvy Suburbanites*. These residents are married couples with no children or older children. They live in established neighborhoods (most built between 1970 and 1990) in the suburban periphery of large metropolitan markets. Ninety-one percent live in single-family owner-occupied homes, with a median value of \$362,900.

Savvy Suburbanites are well educated, as 51 percent are college graduates and 77.6 have some college education. These residents have a median household income of \$108,700 and median net worth of \$518,100, both significantly above the national average. They have a low unemployment rate of 3.5 percent and above average labor force participation rate of 67.9 percent. *Savvy Suburbanites* are informed shoppers that do their research prior to purchasing, and they make liberal use of technology for everything from shopping and banking to staying current and communicating. Their suburban lifestyle includes home remodeling and gardening plus the active pursuit of sports and exercise.




Middleburg: Approximately 6.9 percent (or 4,700) of primary trade area households are defined as *Middleburg*. These households, which consist of young families, are located in semirural locales within metropolitan areas. Their neighborhoods have changed rapidly in the previous decade with the addition of new single-family homes. In terms of education, 65 percent of these residents have a high school diploma or some college education. Both their median household income (\$59,800) and median net worth (\$115,300) are above national figures. The unemployment rate for this group is below average at 4.7 percent and their labor force participation rate (at 66.7 percent) is typical for a younger population.

Middleburg residents have traditional values and prefer to buy American and for a good price. Their favorite sports include hunting, fishing, bowling and baseball. They are partial to domestic vehicles; they like to drive trucks, SUVs or motorcycles. Their preferred entertainment is primarily family-oriented (such as TV, theme parks or family restaurants) or home DIY projects. These consumers are comfortable with technology for convenience and entertainment.

Rustbelt Traditions: Nearly 3.7 percent (or 2,500) of primary trade area households are classified as *Rustbelt Traditions*. A large and growing market, *Rustbelt Traditions* resident are located in the dense urban fringe of metropolitan areas throughout the Midwest and South. Most of them live in modest, single-family homes (which they own) in older neighborhoods built in the 1950s. While most *Rustbelt Traditions* households derive their income from wages and salaries, nearly 31 percent of their households collect Social Security and nearly 20 percent are drawing income from retirement accounts. This group has a median household income of \$51,800 and median net worth of \$98,100. The occupations with the highest number of workers in this market are office and administrative support, sales and related and production.

Rustbelt Traditions residents are family-oriented consumers who value time spent at home. Most of them have lived, worked and played in the same area for years. They are also budget aware shoppers that favor American-made products. Their favorite family restaurants include Applebee's, Arby's and Texas Roadhouse, and they take advantage of convenience stores for fueling up and picking up incidentals.

Figure 9: Downtown Brighton Primary Trade Area Tapestry Lifestyles

<i>Lifestyle Group</i>	<i>Downtown Brighton Primary Trade Area Statistics</i>	<i>Lifestyle Summary</i>
 <p>Green Acres</p>	<p>Households 17,800</p> <p>Population 38,000</p> <p>Median HH Income \$76,800</p> <p>Household Percentage 26.1 %</p> <p>US Market Share 3.2 %</p>	<p>The Green Acres lifestyle features country living and self-reliance. They are avid do-it-yourselfers, maintaining and remodeling their homes, with all the necessary power tools to accomplish the jobs. Gardening, especially growing vegetables, is also a priority, again with the right tools, tillers, tractors, and riding mowers.</p> <p>Outdoor living also features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf. Self-described conservatives, residents of <i>Green Acres</i> remain pessimistic about the near future yet are heavily invested in it.</p>
 <p>Soccer Moms</p>	<p>Households 10,000</p> <p>Population 21,800</p> <p>Median HH Income \$90,500</p> <p>Household Percentage 14.8 %</p> <p>US Market Share 3.0 %</p>	<p>Soccer Moms is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.</p> <p>This group is well insured and invested in a range of funds, from savings accounts or bonds to stocks. <i>Soccer Moms</i> also carry a high level of debt, including first and second mortgages and auto loans.</p>
 <p>Savvy Suburbanites</p>	<p>Households 8,900</p> <p>Population 19,900</p> <p>Median HH Income \$108,700</p> <p>Household Percentage 13.1 %</p> <p>US Market Share 3.0 %</p>	<p>Savvy Suburbanites residents are well educated, well read, and well capitalized. Families include empty nesters and empty nester wannabes, who still have adult children at home.</p> <p>Located in older neighborhoods outside the urban core, their suburban lifestyle includes home remodeling and gardening plus the active pursuit of sports and exercise. They enjoy good food and wine, plus the amenities of the city's cultural events.</p>



Lifestyle Group	Downtown Brighton Primary Trade Area Statistics	Lifestyle Summary
 <p>Middleburg</p>	<p>Households 4,700</p> <p>Population 9,500</p> <p>Median HH Income \$59,800</p> <p>Household Percentage 6.9 %</p> <p>US Market Share 2.9 %</p>	<p>Middleburg neighborhoods transformed from the easy pace of country living to semirural subdivisions in the last decade, when the housing boom reached out. Residents are conservative, family-oriented consumers. Still more country than rock and roll, they are thrifty but willing to carry some debt and are already investing in their futures.</p> <p>They rely on their smartphones and mobile devices to stay in touch and pride themselves on their expertise. They prefer to buy American and travel in the US. This market is younger but growing in size and assets.</p>
 <p>Rustbelt Traditions</p>	<p>Households 2,500</p> <p>Population 4,700</p> <p>Median HH Income \$51,800</p> <p>Household Percentage 3.7 %</p> <p>US Market Share 2.2 %</p>	<p>The backbone of older industrial cities in states surrounding the Great Lakes, Rustbelt Traditions residents are a mix of married-couple families and singles living in older developments of single-family homes. While varied, the work force is primarily white collar, with a higher concentration of skilled workers in manufacturing, retail trade, and health care.</p> <p>Rustbelt Traditions represents a large market of stable, hard-working consumers with modest incomes but an average net worth of nearly \$400,000. Family oriented, they value time spent at home. Most have lived, worked, and played in the same area for years.</p>

Figure 9: The top five Tapestry Lifestyle groups profiled above portray an eclectic population living a suburban lifestyle.

EMPLOYMENT BASE

The employment picture found in downtown Brighton’s primary trade area reflects a concentrated services and retail sector foundation, comprising 60.1 percent of total employment. Compared to the City of Brighton and Livingston County, the concentration of construction and government workers in the primary trade area is high and finance, insurance and real estate (FIRE) workers is low. As shown in *Figure 10*, the services sector employs the single largest percentage (36.7 percent) of people in downtown Brighton’s primary trade area. Within the primary trade area’s services sector, the largest percentage (15.3 percent of total employment in the primary trade area) work in other services, followed by 8.3 percent in health services and 6.5 percent in educational institutions & libraries.

As the second leading category of employment, retail workers account for 23.4 percent of employment within the primary trade area. Within this category, eating and drinking places is the leading subcategory of employment comprising 9.0 percent of total employment, followed by miscellaneous retail (3.6 percent) and food stores (3.0 percent). However, the fact that retail is the second largest employment sector in the primary trade area does not necessarily mean that there is an oversupply of retail in the area; the size and scale of retailers may require a certain number of workers, but this is not indicative of how well these retailers are supplying goods and services to the surrounding community.

Figure 10: Employment Comparison by Sector (SIC)

<i>Employment Sector</i>	<i>Primary Trade Area</i>	<i>City of Brighton</i>	<i>Livingston County</i>	<i>State of Michigan</i>
Agriculture and Mining	1.8%	0.6%	1.9%	1.4%
Construction	5.4%	3.0%	6.0%	3.2%
Manufacturing	13.2%	14.5%	13.7%	11.5%
Transportation	2.0%	1.8%	1.3%	2.2%
Communication	0.3%	0.3%	0.3%	0.6%
Utility	0.6%	0.4%	0.6%	0.5%
Wholesale Trade	3.6%	2.3%	3.3%	6.3%
Retail Trade	23.4%	35.4%	24.8%	20.9%
Finance, Insurance & Real Estate	7.6%	9.6%	8.0%	5.6%
Services	36.7%	30.3%	34.2%	42.7%
Government	5.0%	1.9%	5.4%	4.6%
Unclassified	0.4%	0%	0.5%	0.5%

Figure 10: Services and retail trade comprise the bulk of primary trade area employment.

Daytime employment plays a large role in supporting retail. The primary trade area is estimated to have 64,720 employees; an estimated 18,000 of them are office employees who are known to spend at much higher rates, often eating out for lunch and shopping on the way to and from work. The mix of employees throughout the ten-minute drive time varies from the primary trade area most noticeably in the services industry sector, with an additional 15,920 employees in the primary trade area compared to the 10-minute drive time. Services, retail and finance, insurance & real estate (FIRE) employ the most people by industry inside the ten-minute drivetime with 7,850, 6,470 and 2,550 jobs, respectively. With nearly 23,000 workers within a ten-minute drive time, there is a large daytime consumer base close to downtown Brighton.

Consumer expenditure from daytime employment complements 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 2021 dollars, is estimated at \$180. Weekly non-office worker expenditure is estimated at 37 percent of office workers.

Figure 11: Drive Time and Trade Area Employment by Industry Sector

<i>Employment Sector</i>	<i>5-Minute Drive Time</i>	<i>10-Minute Drive Time</i>	<i>Primary Trade Area</i>
Agriculture & Mining	70	260	1,180
Construction	340	1,010	3,520
Manufacturing	1,180	2,380	8,540
Transportation	170	250	1,270
Communication	40	90	190
Utility	40	80	370
Wholesale Trade	260	750	2,360
Retail Trade	3,510	6,470	15,110
Home Improvement	210	410	1,030
General Merchandise Stores	100	440	1,110
Food Stores	570	710	1,930
Auto Dealers, Gas Stations, Auto Aftermarket	260	860	1,750
Apparel & Accessory Stores	50	200	490
Furniture & Home Furnishings	340	450	630
Eating & Drinking Places	1,510	2,570	5,830
Miscellaneous Retail	470	830	2,340
Finance, Insurance & Real Estate	1,330	2,550	4,900
Banks, Savings, & Lending Institutions	630	780	1,080
Securities Brokers	80	140	230
Insurance Carriers & Agents	210	340	1,360
Real Estate, Holding, Other Investment Offices	410	1,290	2,230
Services	4,080	7,850	23,770
Hotels & Lodging	400	580	950
Automotive Services	150	330	810
Motion Pictures & Amusements	630	1,040	2,130
Health Services	870	2,190	5,380
Legal Services	80	180	390
Education Institutions & Libraries	480	860	4,200
Other Services	1,470	2,670	9,910
Government	170	1,120	3,260
Unclassified Establishments	10	100	250
Total Employment	11,200	22,910	64,720

Figure 11: Downtown Brighton primary trade area's employment by sector.

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 work-week. Retail purchases (general merchandise, apparel, home furnishings, electronics, grocery and convenience

items) make up most of the office worker dollars, at \$120 per week. Restaurant expenditures (full service, limited service and drinking places) account for the balance at \$40 per week. Annualized, each office worker expends \$9,400 before, during and after work.

Figure 12: Ten Minute Drive-Time Worker Expenditure

<i>Category</i>	<i>Weekly Expenditure</i>	<i>Annual Expenditure</i>	<i>Office Worker Expenditure</i>	<i>Non-Office Worker Expenditure</i>	<i>Total Expenditure</i>
Prepared Food & Beverage					
Limited & Full-Service Restaurants	\$40	\$2,300	\$16,100,000	\$13,616,000	\$29,716,000
Drinking Places	\$20	\$900	\$6,300,000	\$5,328,000	\$11,628,000
Retail Goods					
General Merchandise, Apparel, Home Furnishings, Electronics	\$70	\$3,600	\$25,200,000	\$21,312,000	\$46,512,000
Grocery	\$30	\$1,600	\$11,200,000	\$9,472,000	\$20,672,000
Convenience Items	\$20	\$1,000	\$7,000,000	\$5,920,000	\$12,920,000
Total	\$180	\$9,400	\$65,800,000	\$55,648,000	\$121,448,000

Figure 12: Employees within ten minutes of the center of downtown Brighton expend \$121.4 million dollars annually.

The annual impact of 22,910 workers within ten minutes of the center of downtown Brighton is \$121.4 million. This expenditure breaks down to include \$41.3 million in prepared food and beverage establishments, \$20.7 million in grocery purchases, \$46.5 million in retail sales and \$12.9 million in convenience items.

DOWNTOWN BRIGHTON AREA CHARACTERISTICS

Location

Downtown Brighton is in southeast Michigan, approximately 18 miles north of Ann Arbor and 20 miles northwest of Detroit. The downtown covers roughly 840 acres or 1.3 square miles. It extends north to I-96, west and south to the CSX Plymouth Subdivision Railway and east around the commercial development on the east side of Grand River Avenue. This area encompasses the shopping centers of Brighton Town Square and Brighton Mall in the north, as well as the Grand Crossing shopping center in the south. A large segment of South Ore Creek is situated in the middle of the downtown, immediately north of Main Street. Moreover, Grand River Avenue extends north-south through the downtown. Downtown Brighton has a Walk Score of 71 (out of 100) which classifies it as “very walkable.”

Access

Since downtown Brighton is situated near the major intersection of I-96 and U.S. Route 23, it is easily accessible from surrounding cities. The downtown can be reached from Ann Arbor, which lies 18 miles to the south, via U.S. Route 23. It is also easily accessible from the cities of Farmington (21 miles east), Novi (16 miles east) and Lansing (40 miles northwest) via I-96.

Figure 13: Traffic Counts

<i>Road</i>	<i>AADT (Year)</i>
I-96 between Grand River Avenue & Flint Road	97,700 (2019)
Grand River Avenue between Hilton Road & Nemco Way	28,600 (2020)
East Grand River Avenue between Appian Way & Victor Street	20,600 (2019)
South Old US Hwy. 23 south of Victor Street	18,900 (2018)
Spencer Road between Oak Street & Spencer Court	17,800 (2019)
Brighton Road between Hollywood Court & Don Leith Drive	13,500 (2019)
Challis Road between Shana Drive & Liberty Drive	11,200 (2019)
Rickett Road between Barnstable Drive & Meyer Avenue	10,700 (2020)
Hilton Road between Oak Knoll Drive & Grand River Avenue	7,600 (2019)

Figure 13: The traffic chart above shows the heaviest traffic on I-96 and Grand River Avenue (source: Livingston County Road Commission and Michigan Department of Transportation).

Figure 13 shows the thoroughfares within and immediately surrounding downtown Brighton that have the highest traffic volumes: the main commuting routes of I-96, Grand River Avenue and East Grand River Avenue. Furthermore, there is a dense network of local roads surrounding downtown Brighton that makes it easily accessible. In particular, significant traffic enters downtown Brighton from the north via Grand River Avenue, from the south via Rickett Road, Grand River Avenue and Brighton Lake Road, from the west via Brighton Road and from the east via Spencer Road and Hilton Road.

General Retail Market Conditions

According to CoStar, downtown Brighton has a total of 1.8 million sf of retail space. Its current retail market rent is \$16.81/sf, a figure that has decreased 0.5 percent from one year ago. The current retail vacancy rate is 1.8 percent, which has increased by 0.4 percent over the past year but is below the area’s 10-year average retail vacancy rate of 2.9 percent. A total of 10,000 sf of retail space was delivered over the past year but no retail space is currently under construction. The twelve-month retail sales volume was \$1.6 million and properties sold at an average of \$106/sf.

New Residential Development

Several residential development projects are currently planned or under construction in the downtown Brighton area. The largest of these are Conley Square, Bluffs at Spring Hill, West Village of Brighton and Vista at Uptown.

Conley Square, which is currently under construction, is a \$20 million development that will consist of 85 townhomes. Located at Flint Road and Temple Street on Brighton’s northeast side, it is being developed by Robertson Brothers. Conley Square will feature 1,200 sf townhomes with two bedrooms and one-car garages, as well as larger 1,500 sf townhomes with three bedrooms and two-car garages. Prices for these townhomes start at \$254,990 or \$1,150 per month to rent.

Bluffs at Spring Hill will feature 70 single-family homes. Developed by Pulte, this project is located on 29 acres of land between I-96 and the Hamilton Farms condominiums. The homes at Bluffs at Spring Hill range from 1,680 sf to 1,880 sf and are listed for \$340,000 to \$378,000. This development gained final approval in June 2020 and construction broke ground earlier this year.



Figure 14: Conley Square (left); Bluffs at Spring Hill (right)

West Village of Brighton is to consist of 140 for-rent luxury townhomes. Located on the former Lindom School site on the west end of downtown Brighton, this project will be developed by SR Jacobson Development Corporation. The townhomes will consist of 2-and-3-bedroom units ranging from 1,280 sf to 1,550 sf. Each unit will have an open floor plan with high (9 foot) ceilings on the first floor, granite countertops, a master suite with walk-in closets and an in-unit full size washer and dryer. The larger units will also have 2-car attached garages. This project has received preliminary planning approval and final approval is expected in late April 2021.



Figure 15: Vista at Uptown (left); West Village of Brighton (right)

Vista at Uptown is located on about four acres between North Second Street and the Mill Pond. This \$40 million luxury apartment complex, which is being constructed by Lansing-based DTN Development Group, will include 200 units. The apartments will range in size from 600 sf for a one-bedroom unit to 1,350 sf for a three-bedroom unit, with rents ranging from \$1,200 to \$2,400 per month. The apartments will have high-end amenities such as stainless-steel appliances, quartz countertops, tile and in-unit washers and dryers.

City of Brighton Streetscape Plan

In July 2020, the civil engineering and community planning firm Giffels Webster developed a streetscape plan for the City of Brighton. The plan acknowledges that although Brighton has a

vibrant Main Street, its streets and sidewalks are in need of repair. The plan makes several recommendations to improve downtown Brighton’s public realm, such as:

- narrowing vehicular street widths while widening sidewalks
- removing curbs on Main Street near Mill Pond



Figure 16: Removing curbs on Main Street near Mill Pond, while maintaining on-street parking, will offer flexibility for downtown events and festivals (images taken from City of Brighton, Michigan Streetscape Plan).

- adding landscape amenities such as planter pots and landscape beds



Figure 17: Landscape amenities will add seasonal colors and help enliven the downtown (images taken from City of Brighton, Michigan Streetscape Plan).

- adding accent lighting, art and places for people to gather

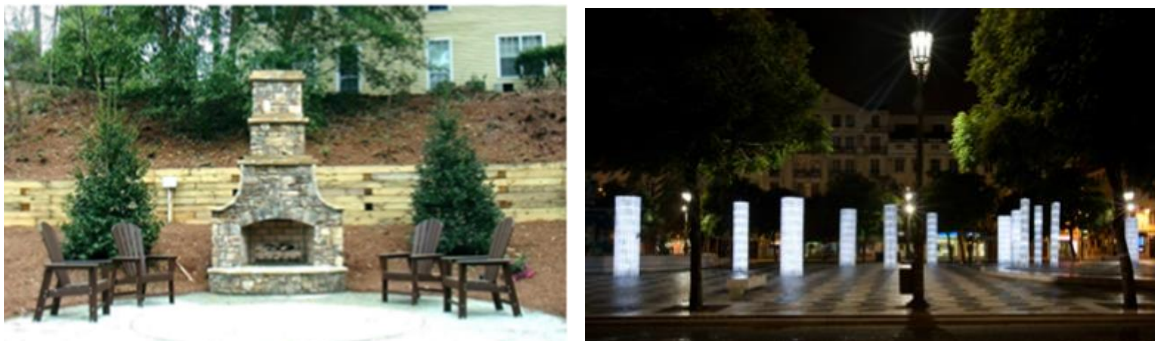
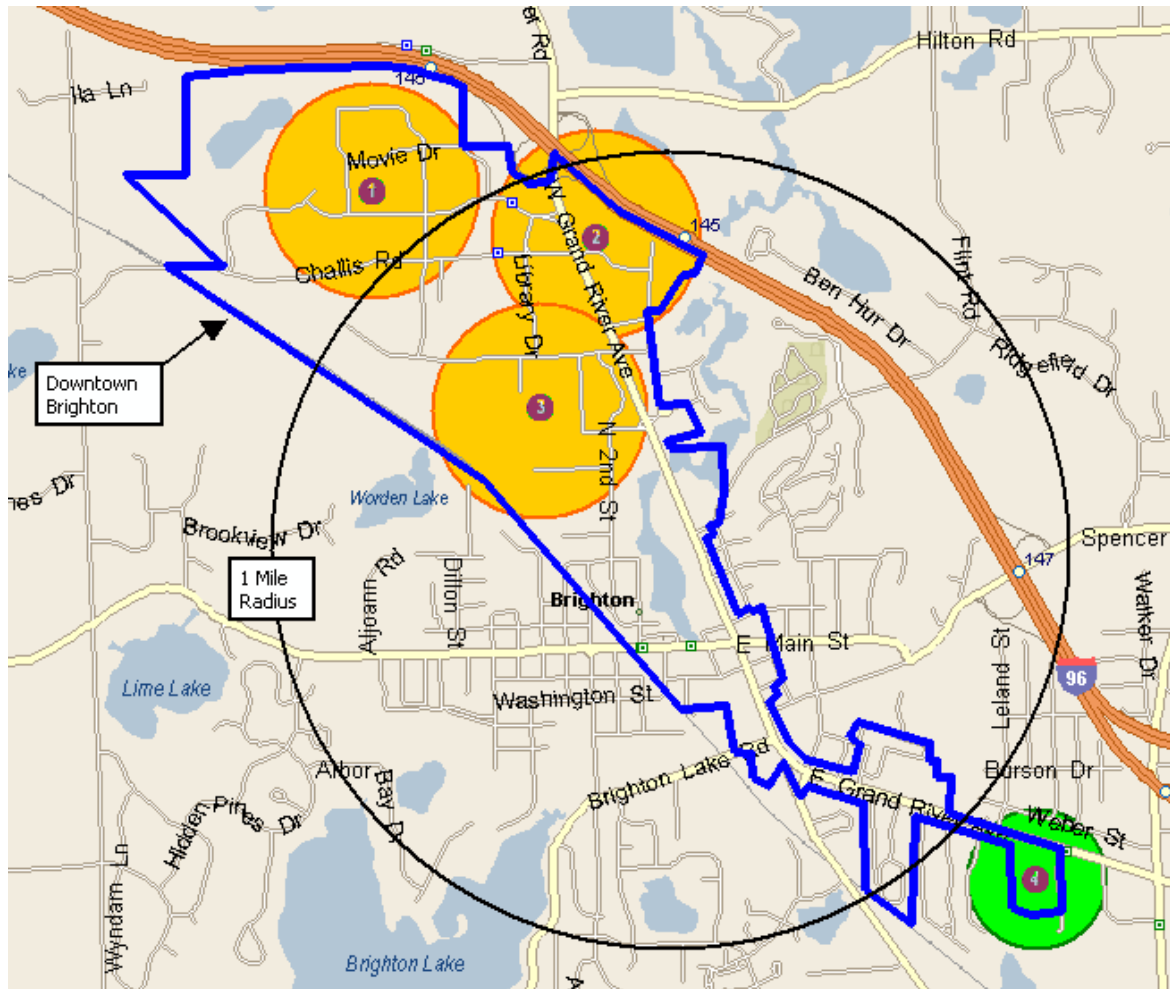


Figure 18: Other streetscape features such as art and accent lighting will help downtown Brighton distinguish itself as a unique shopping destination (images taken from City of Brighton, Michigan Streetscape Plan).

These enhancements to downtown Brighton’s streetscape are planned to be implemented by 2023.

Downtown Brighton Shopping Centers



Retail Center Name	Shopping Center Type	Retail Size (sf)
1. Brighton Towne Square	Power Center	440,000
2. Brighton Mall	Power Center	290,000
3. Meijer	N/A	240,000
4. Grand Crossing	Neighborhood Center	90,000

Figure 19: Map and table of the major shopping centers within downtown Brighton.

1. Brighton Towne Square

This 440,000 sf power center is located at the Grand River Avenue interchange off I-96 in the City of Brighton. Built in 1997, Brighton Towne Square stretches over 75 acres. Currently, its largest tenants by square footage are Target, Home Depot and MJR Theatres. Additionally, this center is home to a 40,000 sf University of Michigan Health Center. Brighton Towne Square features other tenants such as Staples, Party City, Sky Zone Trampoline Park, Starbucks, Chili's and IHOP. Brighton Towne Square is located 1 mile north of Main Street.



Figure 20: In terms of square footage, the largest tenants at Brighton Towne Square are Home Depot (90,000 sf) and Target (120,000 sf).

2. Brighton Mall

The Brighton Mall originally opened in 1970 as an enclosed mall with an A&P supermarket, Grant City department store and twenty-five inline tenants. However, in 1996 the entire indoor mall was demolished and rebuilt as a series of big box tenants. Today, the Brighton Mall is a 290,000 sf power center that is home to Marshalls, Bed Bath & Beyond, Jo-Ann Fabrics and Crafts, Michaels, Aldi, Best Buy and PetSmart. This power center also includes outparcels with restaurants such as Panera Bread, McDonalds and Starbucks. The Brighton Mall benefits from excellent visibility as it is exposed to vehicles along I-96 and Grand River Avenue. The Brighton Mall is located 1 mile north of Main Street.

3. Meijer

There is a 240,000 sf Meijer location at 8650 West Grand River Avenue in downtown Brighton. Originally opened in 1982, this was Livingston County’s first large department store.

4. Grand Crossing



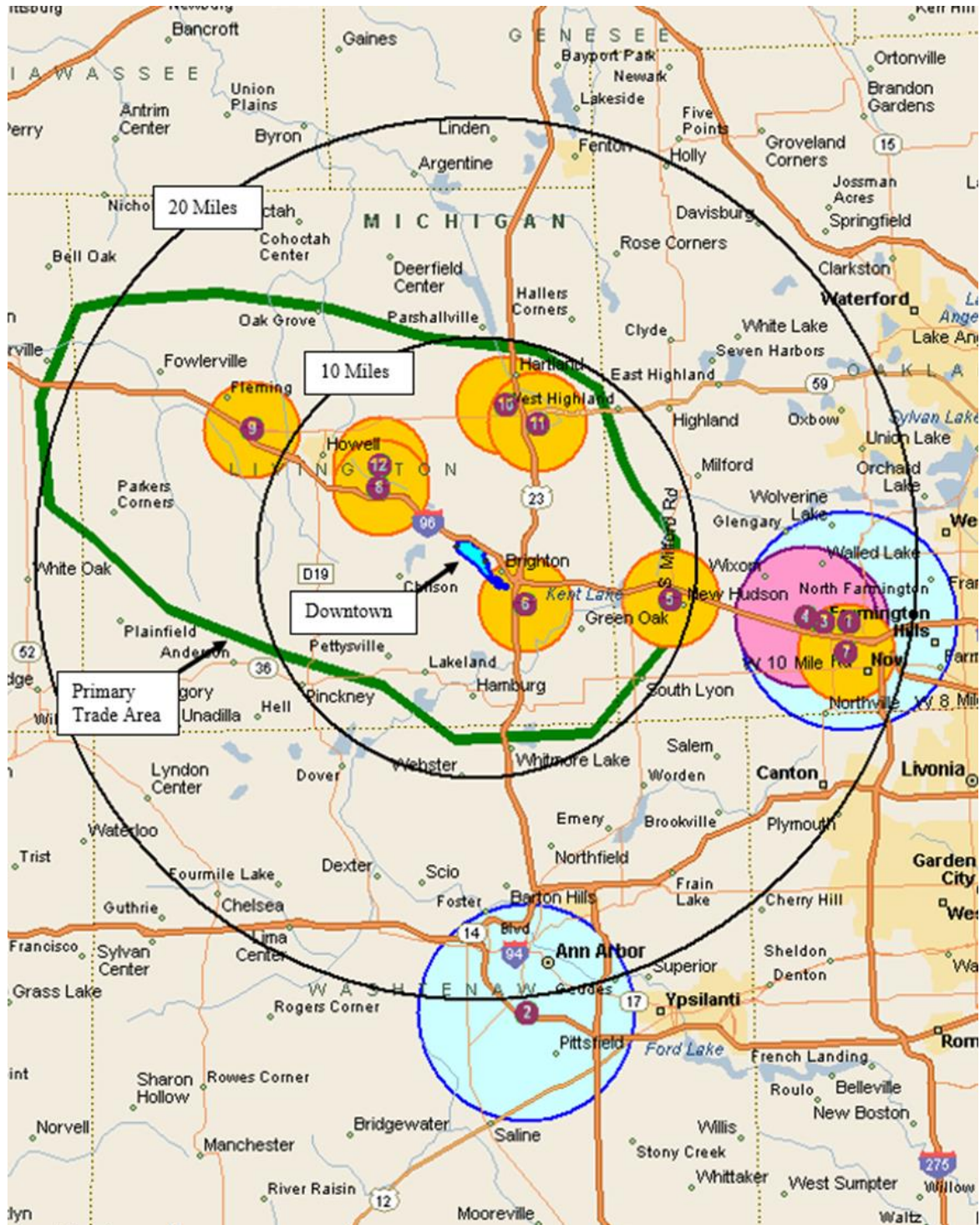
Figure 21: Busch’s Fresh Food Market opened at the Grand Crossing shopping center in 2019.

Grand Crossing is a 90,000 sf neighborhood shopping center in the City of Brighton. It was originally built in 1972 and most recently renovated in 2005. This 90,000 sf center is anchored by a Busch’s Fresh Food Market, which houses a Starbucks. Other tenants at Grand Crossing include Ace Hardware, Mancino’s Pizza & Grinders, GNC, Soccer World, Fantastic Sam’s and Citizens

Bank. Additionally, it is shadow anchored by Kroger. Grand Crossing is owned by Brixmor Property Group and is 1 mile southeast of Main Street.

COMPETING SHOPPING CENTERS

Figure 22: Competing Shopping Centers



<i>Retail Center Name</i>	<i>Shopping Center Type</i>	<i>Retail Size (sf)</i>	<i>Distance to Downtown Brighton</i>
1. Twelve Oaks Mall	Regional Center	1.5 million	16.0 miles
2. Briarwood Mall	Regional Center	980,000	20.0 miles
3. West Oaks I & II	Power Center	840,000	16.0 miles
4. Twelve Mile Crossing at Fountain Walk	Lifestyle center	740,000	15.5 miles
5. Lyon Towne Center	Power Center	520,000	9.0 miles
6. Green Oak Village Place	Community Center	500,000	2.0 miles
7. Novi Town Center	Power Center	450,000	16.0 miles
8. Livingston Commons	Power Center	370,000	6.0 miles
9. Tanger Outlets Howell	Outlet Center	350,000	12.5 miles
10. The Shops at Waldenwoods	Community Center	250,000	7.0 miles
11. Hartland Plaza	Power Center	250,000	7.0 miles
12. Grand River Plaza	Community Center	230,000	6.0 miles

Figure 22: Map and table of the competing regional, power, lifestyle, community and neighborhood shopping centers.

1. Twelve Oaks Mall



Figure 23: In terms of gross leasable area and total stores, the Twelve Oaks Mall is one of the largest shopping centers in the State of Michigan.

Twelve Oaks Mall was developed in 1977 as a joint venture between A. Alfred Taubman, Homart Development and the Dayton-Hudson Corporation. Twelve Oaks Mall is one of four regional Taubman malls built in Metro Detroit during the late 1970s, the other three being Lakeside Mall, Briarwood Mall and the Fairlane Town Center. Initially only anchored by Hudson’s, Sears opened shortly thereafter, followed by Lord & Taylor and JCPenney.

Today, Twelve Oaks Mall features 1.5 million sf of retail space and over 180 stores. Currently, the anchor tenants of the Twelve Oaks Mall are JC Penney, Nordstrom and Macy’s. Some of its other notable retailers and restaurants are Abercrombie & Fitch, Apple, Banana Republic, Coach, H&M, California Pizza Kitchen, lululemon athletica, Pottery Barn, Sephora, Talbots, Fossil, Johnston & Murphy, Victoria’s Secret, Starbucks, Kerby’s Coney Island and Pinkberry. The Twelve Oaks Mall is located 16 miles east of downtown Brighton.

2. Briarwood Mall



Figure 24: On November 15, 2020, downtown Ann Arbor's iconic Urban Outfitters closed its store on State Street (pictured on left with its entrance under the State Theatre's marquee) and opened at the Briarwood Mall (pictured on right).

The Briarwood Mall was developed by A. Alfred Taubman in 1973. Its inaugural anchor tenants were JCPenney and Sears, and Hudson's opened one year later. Today, the Briarwood mall is a regional shopping center that features 980,000 sf of retail and restaurant space. Owned and managed by Simon Property Group, it is currently anchored by Macy's, Von Maur and JCPenney. Some of Briarwood Mall's other shops and restaurants are The Apple Store, Victoria's Secret, Sephora, Pottery Barn, American Eagle Outfitters, Bath and Body Works M Den, PF Chang's, California Pizza Kitchen, Panda Express, Pinkberry, Romano's Macaroni Grill, Starbucks and Wetzel's Pretzels. Briarwood Mall is 20 miles south of downtown Brighton.

3. West Oaks I & II



Figure 25: West Oaks I (left) and II (right) add to the agglomeration of retail by Twelve Oaks Mall in Novi.

Located directly across from Twelve Oaks Mall, West Oaks is composed of two adjacent power centers: West Oaks I and West Oaks II, both of which are owned by RPT Realty. West Oaks I was built in 1979 and features 340,000 sf of retail space. Its major tenants are Gardner White, Nordstrom Rack, Michaels, HomeGoods, The Container Store, Old Navy, DSW, Party City, David's Bridal and Carrabba's Italian Grill. On the other hand, West Oaks II was built in 1986 and has 500,000 sf of retail space. Some of its current tenants are Kohl's, JOANN Fabrics & Crafts, Bob's Discount Furniture, Bed Bath & Beyond, Marshalls, Kirkland's, Five Below, Starbucks and Lands' End. West Oaks I and II are situated 16 miles east of downtown Brighton.

4. Twelve Mile Crossing at Fountain Walk

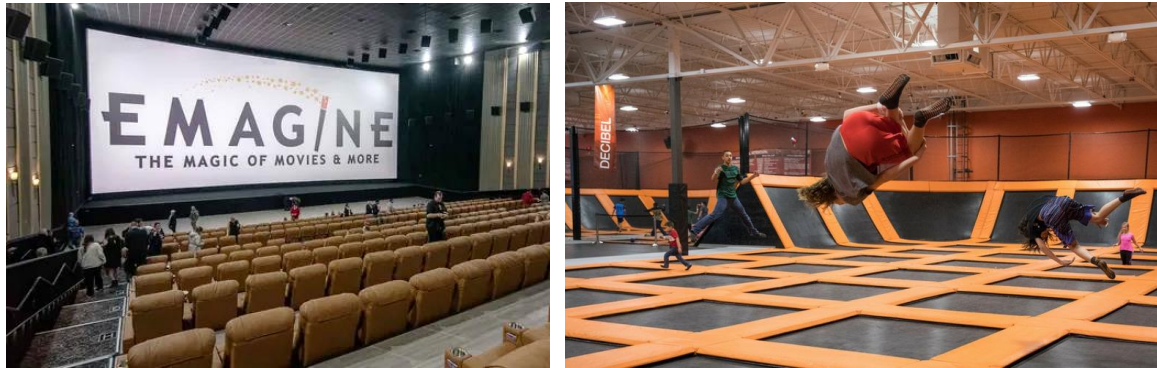


Figure 26: Emagine Novi Theatre (which has Michigan’s largest movie screen) and Airtime Trampoline are only two of the many entertainment options at Twelve Mile Crossing at Fountain Walk.

Built in 2002, Twelve Mile Crossing at Fountain Walk is a 740,000 sf lifestyle center situated across from Twelve Oaks Mall in the City of Novi. Its shopping options include Dick’s Sporting Goods, Floor & Décor, American Home Fitness, Rocket Fizz and the Family Puppy. This center is also home to many restaurants, such as Bar Louie, Beerhead Bar & Eatery, Blackrock Bar & Grill, Buddy’s Pizza, Buffalo Wild Wings, Cold Stone Creamery, Kung Fu Tea and Noodletopia. However, Twelve Mile Crossing at Fountain Walk is perhaps best known as a regional entertainment destination. Indeed, it is home to the 18-screen Emagine Novi Theatre, Airtime Trampoline, Aqua Tots, The Backyard Axe Throwing League (BATL), Chuck E. Cheese’s, Escape Room, Full Throttle Adrenaline Park and Putting Edge. Currently owned and managed by Spigel Properties, Twelve Mile Crossing at Fountain Walk is located 15.5 miles east of downtown Brighton.

5. Lyon Towne Center

Sprawling over 78 acres, Lyon Towne Center is a 520,000 sf power center that contains a 230,000 sf Walmart Supercenter and 150,000 sf Lowe’s Home Improvement. This center also includes several outparcels with restaurants such as Starbucks, Applebee’s, McDonalds, Jet’s Pizza and Leo’s Coney Island. Lyon Towne Center benefits from excellent visibility and accessibility, as it is visible from I-96 and located right off the I-96 Milford Road exit. It is located in the City of New Hudson, 9 miles east of downtown Brighton.

6. Green Oak Village Place

The recipient for three years running of the “People Choice Award” for shopping in Livingston County, Green Oak Village Place is a large 500,000 sf community shopping center. Located in the City of Brighton, this \$100 million center opened in stages between 2006 and 2008. It was developed by Lormax Stern and REDICO and currently spans 68-acres. Today, Green Oak Village Place has six anchor stores: Dick’s Sporting Goods, JCPenney, Homegoods, DSW Shoe Warehouse, Barnes & Noble and T.J. Maxx. Additionally, it features over fifty inline tenants, such as Bath & Body Works, Ulta, Chico’s, Torrid, Victoria’s Secret, Claire’s, Dover Saddlery, Five Below, Lumber Liquidators, Wild Birds Unlimited, Men’s Warehouse, Don Juan Mexican Restaurant, Rollin Stone Wood Fire Pizza, Honey Baked Ham Company and Kerby’s Coney Island. Green Oak Village Place is 2 miles southeast of downtown Brighton.

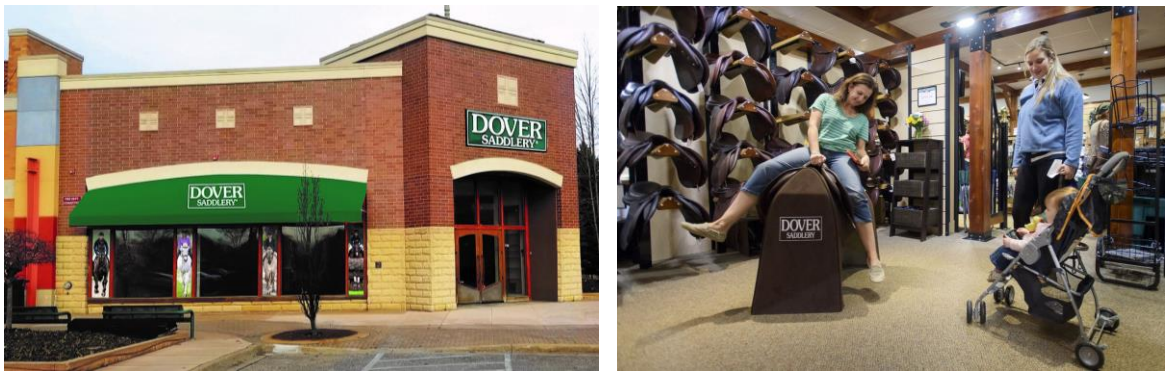


Figure 27: Earlier this year, Massachusetts-based Dover Saddlery opened a 6,000 sf store at Green Oak Village Place. Dover Saddlery sells a variety of equestrian products such as clothing, saddles, horse health products, blankets and other stable items.

7. Novi Town Center

Developed by Trammell Crow in 1987, Novi Town Center is a 450,000 sf power center. Its retailers include Walmart Supercenter, TJ Maxx, Hobby Lobby, ULTA Beauty, Sierra Trading Post and Pure Hockey. Novi Town Center is also home to several restaurants, such as Jim Brady’s, Chipotle, Primanti Bros., Potbelly, Bonefish Grille, Pei Wei and Sweetwaters Coffee & Tea. This center reports average annual sales of \$100 million and is currently managed by CBRE. Novi Town Center is situated across I-96 from Twelve Oaks Mall and 16 miles east of downtown Brighton.



Figure 28: In terms of square footage, the two largest anchor tenants at the Novi Town Center are Walmart (150,000 sf) and Hobby Lobby (55,000 sf).

8. Livingston Commons Shopping Center

This 370,000 sf power center is directly across Grand River Avenue from the Grand River Plaza shopping center. Livingston Commons benefits from being in one of the strongest retail corridors of Livingston County, as there is over 1.5 million sf of retail space within a 0.75-mile radius. Furthermore, Livingston Commons benefits from being situated just off of the newly constructed full access Latson Road exit on I-96, allowing for easy access for consumers in all directions. The current tenants at Livingston Commons are Walmart Supercenter, Lowe’s Home Improvement, PetSmart and restaurants KFC, White Castle, Bob Evans, Culver’s and Panera Bread. Livingston Commons is 6 miles northwest of downtown Brighton.

9. Tanger Outlets Howell

What is now Tanger Outlets Howell originally opened in 1996 as the Kensington Valley Factory Shops. The outlet mall was renamed in 2002 when it was bought by the Tanger REIT (Real Estate Investment Trust) for \$37.5 million. For years, Tanger Outlets Howell has been the number one attraction in Livingston County, as it draws an average of over 2 million visitors each year. It consists of 60 outlet stores that total 350,000 sf. These stores include apparel, accessories & jewelry, home furnishings and specialty stores such as Banana Republic Factory, Polo Ralph Lauren Factory Store, H&M, Kay Jewelers Outlet, Ann Taylor Factory Store, Claire's, Coach and Pandora. Tanger Outlets Howell is located 12.5 miles northwest of downtown Brighton.

10. The Shops at Waldenwoods

The Shops at Waldenwoods is located in the City of Hartland at the busy intersection of U.S. 23 and M-59. It was built in 2002 and is owned and managed by Robert B. Aikens & Associates. Today it is a 250,000 sf community shopping center anchored by Target and Kroger. Other current retailers and restaurants at this center include CVS Pharmacy, Starbucks, Hallmark, Tony Sacco's Coal Oven Pizza, Subway and Pizza Hut. The Shops at Waldenwoods is 7 miles north of downtown Brighton.

11. Hartland Plaza



Figure 29: The 175,000 sf building at Hartland Plaza that used to house Walmart is now occupied by Rural King and Noble Appliance.

Built in 1980, Hartland Plaza is a 250,000 sf power center. It is located in the City of Hartland, 7 miles north of downtown Brighton. Previously home to a 175,000 sf Walmart Supercenter, which closed in 2017, Hartland Plaza is now anchored by a 100,000 sf Rural King and 75,000 sf Noble Appliance. Today, Hartland Plaza is also home to Dollar Tree, Rally's, Red Olive Restaurant, McDonald's and Great Clips, among others. However, 75,000 sf of space at Hartland Plaza is currently vacant.

12. Grand River Plaza

Located in the City of Howell across from the Livingston Commons shopping center, Grand River Plaza is a 230,000 sf community center. It was built in 1990 and today it is home to Dunham's Sports, Big Lots, Family Farm & Home, Perfect Edge Hockey, Oceanside Seafood, Kolt Jewelers, Wendy's, Arby's, Taco Bell, GNC and Sally Beauty Supply, among others. In the summer of

2018, Carson's closed its 75,000 sf store at this center and its former spot still sits vacant. Grand River Plaza is owned by Northeast Capital Group and is situated 6 miles northwest of downtown Brighton.

ANALYSIS ASSUMPTIONS

Gibbs Planning Group, Inc. has assumed the following factors in the completion of this commercial market analysis:

- No major regional retail centers will be developed within the defined downtown Brighton primary trade area through 2026.
- The region's economy will continue at normal or above normal ranges of employment, inflation, retail demand and growth.
- Properties within downtown Brighton will be properly zoned and have the necessary infrastructure to support new commercial development.
- Annual population growth for the primary trade area is estimated to be 0.85 percent from 2021 to 2026.
- Any new commercial development in downtown Brighton will be planned, designed, built and managed to the best practices of the American Institute of Architects, American Planning Association, American Society of Landscape Architects, Congress for New Urbanism, International Council of Shopping Centers and the ULI.

RETAIL & RESTAURANT DEMAND

This study estimates that if best practices are implemented, then an additional \$45.9 million in new annual sales can currently be captured by downtown Brighton retailers and restaurants, growing to \$48.2 million annually by 2026. If achieved, this growth could support 100,000 sf of new retailers and 20,000 sf of new restaurants, for a total of 120,000 sf. This growth could be absorbed with the opening of 25 - 40 new businesses or by existing stores and restaurants through expanded operations and marketing. If managed per industry best practices, these stores could generate above average sales of \$354 per square foot per year.

Downtown Brighton can presently support additional stores that could generate up to \$38.7 million in new annual sales, growing to \$40.5 million annually by 2026. The market can also support brew pubs, full-service, limited-service and specialty food restaurants producing \$7.3 million in annual sales, growing to \$7.7 million annually by 2026.

See below GPG's supportable retail table, *Figure 30*. Note, these supportable numbers are in addition to existing downtown Brighton businesses and only reflect potential new demand.

Figure 30: Supportable Retail Table

Retail Category	Est. Support. SF	2021 Sales/SF	2021 Est. Retail Sales	2026 Sales/SF	2026 Est. Retail Sales
Retailers					
Men's Clothing Stores	3,000 sf	\$310	\$930,000	\$325	\$975,000
Women's Clothing Stores	1,700 sf	\$315	\$535,500	\$330	\$561,000
Children's Clothing Stores	1,800 sf	\$310	\$558,000	\$325	\$585,000
Beer, Wine & Liquor Stores	2,700 sf	\$340	\$918,000	\$355	\$958,500
Book Stores	1,600 sf	\$280	\$448,000	\$295	\$472,000
Used Record Stores	1,200 sf	\$275	\$330,000	\$290	\$348,000
Electronics Stores	4,700 sf	\$350	\$1,645,000	\$370	\$1,739,000
Household Appliance Stores	3,500 sf	\$330	\$1,155,000	\$345	\$1,207,500
Florists	1,400 sf	\$265	\$371,000	\$280	\$392,000
Garden Stores	1,200 sf	\$280	\$336,000	\$295	\$354,000
Specialty Grocery Stores	21,600 sf	\$520	\$11,232,000	\$545	\$11,772,000
Paint Stores	2,500 sf	\$340	\$850,000	\$355	\$887,500
Plumbing Supply Stores	1,900 sf	\$330	\$627,000	\$345	\$655,500
Tool Stores	2,000 sf	\$350	\$700,000	\$370	\$740,000
Window Stores	2,300 sf	\$330	\$759,000	\$345	\$793,500
Kitchenware Stores	4,100 sf	\$390	\$1,599,000	\$410	\$1,681,000
Bedding & Linen Stores	3,600 sf	\$390	\$1,404,000	\$410	\$1,476,000
Floor Covering Stores	3,000 sf	\$380	\$1,140,000	\$400	\$1,200,000
Jewelry Stores, Costume	4,200 sf	\$365	\$1,533,000	\$385	\$1,617,000
Gift Stores	3,100 sf	\$300	\$930,000	\$315	\$976,500
Pharmacy	7,800 sf	\$325	\$2,535,000	\$340	\$2,652,000
Cosmetics, Beauty & Perfume Stores	3,500 sf	\$330	\$1,155,000	\$345	\$1,207,500
Health Food Stores	2,300 sf	\$320	\$736,000	\$335	\$770,500
Optical Goods Stores	3,900 sf	\$320	\$1,248,000	\$335	\$1,306,500
Meat Markets	4,300 sf	\$440	\$1,892,000	\$460	\$1,978,000
Gourmet Food Stores	2,800 sf	\$450	\$1,260,000	\$475	\$1,330,000
Sporting Goods Stores	3,700 sf	\$340	\$1,258,000	\$355	\$1,313,500
Hobby, Toy & Games Stores	2,900 sf	\$335	\$971,500	\$350	\$1,015,000
Retailer Totals	102,300 sf	\$343	\$39,056,000	\$361	\$39,949,000
Restaurants					
Bars, Breweries & Pubs	3,800 sf	\$390	\$1,482,000	\$410	\$1,558,000
Casual Family Restaurants	6,500 sf	\$350	\$2,275,000	\$370	\$2,405,000
Diners	1,900 sf	\$340	\$646,000	\$355	\$674,500
Fast Casual Restaurants	6,300 sf	\$360	\$2,268,000	\$380	\$2,394,000
Delicatessens	1,600 sf	\$335	\$536,000	\$350	\$560,000
Bakery, coffee, ice cream, etc.	2,000 sf	\$370	\$740,000	\$390	\$780,000
Restaurant Totals	22,100 sf	\$358	\$7,947,000	\$376	\$8,371,500
Retailer & Restaurant Totals	124,400 sf	\$346	\$47,003,000	\$363	\$48,320,500

Figure 30: Downtown Brighton's additional retail and restaurant demand (sales stated in constant 2021 dollars).

A detailed discussion of each supportable retail/restaurant category follows, which includes the lifestyle characteristics of their shoppers, design and merchandise suggestions and specific retailers and restaurants that could deploy a new business in the downtown.

- **Men's Clothing Stores** (3,000 sf, 2-3 stores): establishments primarily engaged in retailing a general line of new men's and boys' clothing. These retailers may provide basic alterations, such as hemming, taking in or letting out seams, or lengthening or shortening sleeves. These stores will mainly appeal to fashion-conscious professionals seeking upscale brands, exceptional service and well-appointed stores. In particular, they will appeal to members of the *Savvy Suburbanites*, *Soccer Moms*, *Professional Pride and Exurbanites* lifestyle groups, who enjoy dining out at nicer restaurants, traveling and attending cultural events. These demographic groups prefer name brand apparel such as Bivouac, Bridge Street Exchange, Buckle, Craig Ryan, DX Big & Tall, Levi, Moose Jaw, Nike, North Face, Orvis, Patagonia, Peter Millar, Rally House, Renaissance Clothing, Roots, Shinola, Southern Tide, SunRy's Boots, Sperry Shoes and the Painted Trout.

Men's clothing stores in downtown Brighton should focus on one or two of the following: active wear (golf, travel, fishing, etc.), business casual, college insignias, or casual wear geared for professionals, business owners and discriminating men. All of these stores should also sell a limited selection of shoes and women's accessories. The stores should be designed with modern or transitional décor, excellent lighting, finishes and with retro or relaxed fixturing. Lifestyle displays featuring vintage automobile, watercraft or home goods should be used. The stores should maintain extended hours including being open two evenings each week and on Saturdays (at a minimum). If possible, stores should also open on Sundays.

- **Women's Clothing Stores** (1,700 sf, 1-2 stores): small to large retailers primarily engaged in retailing a general line of new women's, misses'; and juniors' clothing, including maternity wear. These retailers may provide basic alterations, such as hemming, taking in or letting out seams, or lengthening or shortening sleeves. As with men's clothing stores, upscale women's clothing stores will also particularly appeal to the relatively affluent residents of the *Savvy Suburbanites*, *Soccer Moms*, *Professional Pride and Exurbanites* lifestyle groups who prefer moderate to upper priced brands. Downtown Brighton's primary trade area includes over 22,000 of these households.

Women's clothing stores in downtown Brighton should carry the following brands: Alice and Olivia, Bivouac, Buckle, Clothes Encounters, Evereve, Francescas, Gretchen Scott, Haystacks, Levi, Lily Pulitzer, Moose Jaw, North Face, Orvis, Patagonia, Ray Ban, Roots, Shinola, Southern Tide, Sperry shoes, Stuart Weitzman, The Find, Theory, Title Nine, V2V, Village Shoes and Vineyard Vines.

- **Children's & Teens Clothing Stores** (1,800 sf, 1-2 stores): Specialty stores primarily engaged in retailing a general line of new children's and infants' clothing. These stores may provide basic alterations, such as hemming, taking in or letting out seams, or

lengthening or shortening sleeves. Children's clothing stores will primarily be frequented by consumers with young children or grandchildren such as those belonging to the upper income *Soccer Moms* and *Savvy Suburbanites* lifestyle groups, as well as moderate income families such as *Green Acres*, *Middleburg* and *Rustbelt Traditions* seeking upscale clothing and accessories for special occasions. These stores should focus on children under age 8, with an especially deep inventory for toddlers and infants.

These children's stores can be as small as 200 sf, or a department in a larger women's or department goods store. They should be designed with well-appointed and traditional finishes and fixturing in light or pastel colors. These stores should offer upscale or designer brands including Beatrix Potter, Buckle, Bumpkins, Egg New York, Carter's, Catching Fireflies, Chickpea Kids, Goody Two Shoes, Kitty Face, Little Something, Once Upon a Child, Oshkosh B'Gosh, Pipsqueak Boutique and Roots.

- **Beer, Wine & Liquor Stores** (2,700 sf; 1 store): establishments primarily engaged in retailing packaged alcoholic beverages, such as ale, beer, wine and liquor. The stores should target upscale, discriminating lifestyle groups who are seeking specialty beverages for special occasions or gifts. The businesses should avoid discount or bargain priced brands. Members of the upscale *Savvy Suburbanites* and *Soccer Moms* will frequent these stores. The stores should offer an extensive inventory of upscale handcrafted beers, spirits and wine.

These stores should also sell complimentary glassware, gadgets, crackers, baked goods, cheese and gift baskets. Store finishes and fixturing should represent the homes and resorts of its customers and feature attractive fixturing, display cases, lighting and graphics. Sales staff should be seasoned experts in all beverages and able to recommend appropriate brands for special occasions. To attract customers seeking quality over price, sales and promotions should be minimal. These types of stores should be independent, locally owned businesses in a stand-alone location and offer free, adjacent parking and home delivery service.

Book Stores (1,600 sf; 1 store): Store businesses primarily engaged in retailing new books. These stores have broad appeal across all lifestyle groups including young families, millennials and empty nesters. In order to compete with large booksellers, these stores should offer general best sellers and focus on selling an extensive inventory on a specific category such as architectural design, business, children's books, cooking, gardening, home regional interest, religion, travel, etc. These specialty book stores should target specific age groups, income levels, family sizes and educated lifestyle groups, depending on their brand and specialty.

- **Used record Stores** (1,200 sf; 1 store): establishments primarily engaged in retailing used prerecorded audio and video tapes, compact discs (CDs), digital video discs (DVDs) and phonograph records. These stores appeal to consumers of many ages and demographic backgrounds, but especially to millennials in the *Green Acres*, *Middleburg*, *The Great Outdoors*, *Soccer Moms* and *Savvy Suburbanites* lifestyle groups who are nostalgic for the

music of when they were younger. These stores can be as small as 200 sf or a department in a store selling books, youth apparel, vintage or secondhand merchandise. Used record stores can be located in out of the way locations with low building rents and minimal interior store improvements, fixturing or finishes. The record store could likely be an independently owned start up.

- **Electronics Stores** (4,700 sf; 1 store): These stores are primarily cell phone stores, but also include (1) establishments known as consumer electronics stores primarily engaged in retailing a general line of new consumer-type electronic products such as televisions, computers and cameras; (2) establishments specializing in retailing a single line of consumer-type electronic products; (3) establishments primarily engaged in retailing these new electronic products in combination with repair and support services; (4) establishments primarily engaged in retailing new prepackaged computer software; and/or (5) establishments primarily engaged in retailing prerecorded audio and video media. These stores are typically stand-alone businesses but can be departments in a large home goods or home improvement store.

Although these stores attract a wide variety of consumers, they will be particularly appealing to members of the tech-savvy *Soccer Moms* (who are connected on a host of wireless devices from iPods to tablets), *Savvy Suburbanites* (who appreciate technology and make liberal use of it for everything from shopping and banking to staying current and communicating) and *Middleburg* (who rely on their smartphones and mobile devices to stay in touch and pride themselves on their technical expertise) lifestyle groups. Electronics stores generate high enough sales to afford prime main street locations and well-appointed interiors and storefronts.

Household Appliance Stores (3,500 sf; 1 store): These stores comprise businesses known as appliance stores that are primarily engaged in retailing an array of new household appliances, such as refrigerators, dishwashers, ovens, irons, coffee makers, hair dryers, electric razors, room air-conditioners, microwave ovens, sewing machines and vacuum cleaners, or retailing new appliances in combination with appliance repair services. These stores have broad appeal across all lifestyle groups but especially new homeowners and *Savvy Suburbanites* who regularly update their kitchens and frequently entertain at their upscale homes.

These stores generate high sales and can afford prime locations and well-appointed interiors. Many of the appliance stores will likely be independently, but could potentially include Arbor Vacuum, Carl's Appliances, Day Furs, EmersonV, Independent Kirby, Sm Sewing, Hawthorn Appliance and the Vacuum Store.

- **Florists** (1,400 sf; 1 store): establishments primarily engaged in retailing cut flowers, floral arrangements and potted plants purchased from others. These establishments usually prepare the arrangements they sell. Florists have the most appeal to *Savvy Suburbanites* and *Green Acres* residents, both of whom are especially passionate about

gardening and beautifying their homes. The flower store will likely be an independently owned start up, but could potentially include Blossoms, Chelsea Village Flowers or Sweet Peal Floral Design.

- **Garden Stores** (1,200 sf; 1-2 stores): This industry comprises establishments primarily engaged in retailing garden products, such as plants, seeds, bulbs and sod, that are predominantly grown elsewhere. These stores may sell a limited amount of a product they grow themselves. Garden stores particularly appeal to residents of the do-it-yourself *Green Acres* lifestyle segment, as well as other who are especially enjoy about gardening. These garden stores can also focus on antique, planters, European statuary, furnishings and heirloom plants that would have the most appeal to design or status sensitive *Savvy Suburbanites* and *Soccer Moms* residents, both of whom are passionate about beautifying their homes or giving beautiful flower arrangements as gifts for special occasions.

These stores can be as small as 200 sf or a department in a larger gourmet grocery store. They can also be deployed in out-of-the-way, inexpensive locations. The garden store will likely be an independently owned start up, but could potentially include Downtown Home and Garden (Ann Arbor), Garden Mill, Potting Shed, The Vines Flower and Garden Shop,

- **Specialty Grocery Store** (21,600 sf; 1 store): a specialty store engaged in retailing a range of food products such as gourmet prepared foods, premium meats, fresh produce, bakery, dairy items, as well as beer, wine and liquor. These higher priced markets should offer exceptional, knowledgeable service and will primarily appeal to members of the more affluent *Savvy Suburbanites* and *Soccer Moms* lifestyle groups. The market should be a stand-alone store with its own independent or regional brand such as Plum Market, Papa Joe's, Nina Savagios, Holiday Market or Fresh Thyme Market.

This type of store should be deployed in a prime location downtown or in one of the area's better maintained and updated shopping centers. If the market is located in or near the downtown, then it could drive many new upscale visitors to the area and increase the sales of other downtown retailers and restaurants by as much as 25 percent.

- **Paint Stores** (2,500 sf; 1 store): This industry comprises establishments known as paint and wallpaper stores which are primarily engaged in retailing paint, wallpaper and related supplies. These stores will especially appeal to members of the DIY *Green Acres*, *Soccer Moms* and *Savvy Suburbanites* lifestyle groups who take on small home improvement projects as a hobby or prefer to have their contractor use high quality paints. When they offer convenient parking, a broad selection of colors and supporting tools, paint stores can compete with large home improvement stores and smaller hardware stores. The paint store should be located along the Grand River corridor in a stand-alone location or in a prime shopping center and could potentially include: Benjamin Moore, Sherwin-Williams or Teknicolor.

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- **Tool Stores** (2,000 sf; 1 store): a retail store engaged primarily in the indoor sale of equipment designed for a particular type of work. As with paint stores, tool stores are most popular with members of *Green Acres* and the *Soccer Moms* and *Savvy Suburbanites* residents who engage in woodworking or automotive repairs as a hobby. The store should be in a convenient shopping center along the Grand River corridor or as a department in a home improvement or hardware store. Glenn Wing Power Tools could also potentially deploy a store along the Grand River corridor.
 - **Plumbing Supply Stores** (1,900 sf; 1 store): establishments primarily engaged in retailing plumbing equipment and supplies. Similar to paint and tool stores, plumbing supply stores will most often be frequented by members of groups that regularly do their own home improvement projects, particularly members of *Green Acres*. The least likely to shop at plumbing supply stores are those who would regularly hire a plumbing service, such as the more well-to-do *Savvy Suburbanites*. The plumbing supply store should be located in a convenient shopping center along Grand River Avenue. Plumbing supply stores will likely be departments in larger home improvement stores, but could include Advance Plumbing, Ferguson Plumbing Supply, Herald Wholesale, Russel Hardware or Wolverine Supply.
 - **Window Stores** (2,000 sf; 1 store): This industry comprises establishments primarily engaged in retailing new window furnishings, such as curtains, drapes, blinds and shades. These stores have broad appeal across all lifestyle groups but especially those living in upscale homes or neighborhoods such as *Soccer Moms* and *Savvy Suburbanites*. Window stores are typically unique to a large region, having 20 to 30 mile trade areas. These stores can be a department within a hardware, appliance, lumber or home furnishings store. However, they are more frequently in modern stand-alone buildings with generous daylight and well-fixtured to reinforce their quality windows and service. The stand alone window stores will likely be a national manufacturer such as Anderson Renewal or Pella.
 - **Kitchenware Stores** (4,100 sf; 1-2 stores): establishments that sell kitchenware, which includes aluminum ware, China, cookware, cutlery, enamelware, glassware, metalware, tinware and barbeque grills. Members from all lifestyle groups will shop at these stores, but especially *Savvy Suburbanites*, *Soccer Moms*, *Professional Pride* and *Exurbanites* who have second homes, large kitchens and pantries and who frequently entertain at home.

The kitchenware stores should sell upscale brands and high quality appliances, housewares, herbs, gourmet food, gift baskets and complimentary apparel and homewares. The stores should focus on deploying along Main Street in a prime downtown location. They should be very well-appointed, with modern fixtures, merchandise displays, lighting and furnishing. The sales associates should be seasoned cooks and knowledgeable about the details of the kitchen wares and appliances. The kitchen store will likely be an independently owned start up but could potentially include stores like Bumbles Dry Goods or Sur La Table.

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- **Bedding & Linen Stores** (3,600 sf; 1-2 stores): Stores primarily engaged in the retail sale of bedding and linens, including sheets, blankets, pillows and spreads. These stores have broad appeal across all lifestyle groups depending on their targeted market segments and price-points. These stores can range from big-box discount chain stores that appeal to value seeking *Green Acres, Middleburg, Rustbelt Traditions, Parks and Rec* and *The Great Outdoors* to small specialty boutique shops offering select designer and imported luxury bedding and linens. The discount stores should be located along the Grand River corridor, while the smaller specialty shops at primary locations in the downtown.

Since the big box stores will compete with major discount department stores, they should have an extensive merchandise mix, brands and regular promotions. These stores should have high ceilings, minimal finishes and basic fixtures. The boutique stores should cater to the upper-income and highly educated *Savvy Suburbanites, Soccer Moms, Professional Pride* and *Exurbanites*. They can be as small as 200 sf but should be well-designed with upscale lighting, finishes, fixturing and storefronts.

Bed Bath and Beyond represents Brighton's largest bedding store, but other smaller independent specialty stores such as *Calico Corners, Kitchen Collection, Majestic Beds, Nancy's Linens, NuCentury Textile* and *Silver Point* may potentially deploy a small store in downtown Brighton.

- **Floor Covering Stores** (3,000 sf; 1 store): This industry comprises establishments primarily engaged in retailing new floor coverings, such as rugs and carpets, vinyl floor coverings and floor tile (except ceramic or wood only); or retailing new floor coverings in combination with installation and repair services. These stores have broad appeal across all lifestyle groups.
- **Jewelry Stores, Costume** (4,200 sf; 2 stores): establishments that sell a range of decorative items worn for personal adornment that are manufactured as less expensive ornamentation. These stores will appeal to members of the *Rustbelt Traditions, Middleburg, Soccer Moms* and *Greenacres* lifestyle segments, for whom the jewelry sold at higher-end Jewelry stores such as *Rotterdam Jewelers* is beyond their budget. These stores should focus on silver, designer jewelry, with price points affordable for teens, young professionals and families. To reinforce the business as a jewelry destination, watches, apparel, handbags and other accessories should not be carried. These moderately priced, designer jewelry stores will likely be independent start up businesses.
- **Gift Stores** (3,100 sf; 2 stores): establishments engaged in retailing new gifts, novelty merchandise, souvenirs, greeting cards, seasonal and holiday decorations and curios. Members of all lifestyle groups frequent these stores. These stores should offer extensive gift cards, stationary and wrapping paper along with collectables, toys and home accessories. The gift stores could be in a prime downtown location or in a grocery-anchored shopping center along the Grand River corridor. These moderately priced gift stores will likely be independent start-up businesses but could include: *Bumbles Dry*

Goods, Great Lakes Art & Gifts, Avenue 19 Boutique, the Rosary Book & Gift shop, 16 Hands, Iron Gate, FOUND, Sundance, Vet's Too, Violet & Moss.

- **Pharmacy** (7,800 sf; 1-2 stores): Establishments primarily engaged in retailing health and personal care products. Pharmacies have broad appeal across all lifestyle groups. The pharmacies could be a smaller independent store such as Mills, a department is a supermarket or larger national chain stores seeking to deploy a duplicate infill store in Brighton.
- **Cosmetic & Beauty Supplies and Perfume stores** (3,500; 1-2 stores): This industry comprises establishments known as cosmetic or perfume stores or beauty supply shops primarily engaged in retailing cosmetics, perfumes, toiletries and personal grooming products. These stores will primarily appeal to the fashion conscious members of the *Savvy Suburbanites* lifestyle group.
- **Health Food Stores** (2,300 sf; 1 store): establishments primarily engaged in retailing food supplement products, such as vitamins, nutrition supplements and body enhancing supplements. These stores' consumers most commonly come from the health conscious *Green Acres* and *Savvy Suburbanites* lifestyle groups.
- **Optical Goods Stores** (3,900 sf; 1-2 stores): This industry comprises establishments primarily engaged in one or more of the following: (1) retailing and fitting prescription eyeglasses and contact lenses; (2) retailing prescription eyeglasses in combination with the grinding of lenses to order on the premises; and (3) selling nonprescription glasses. These stores have broad appeal across all lifestyle groups.
- **Meat Markets** (4,300 sf; 2-3 stores): This industry comprises establishments primarily engaged in retailing fresh, frozen or cured meats and poultry. Delicatessen-type establishments primarily engaged in retailing fresh meat are included in this industry. The most common customers to a meat market in downtown Brighton would be members of the *Green Acres* and *Savvy Suburbanites* lifestyle groups, since they have a particular appreciation for fresh meats and can afford to pay a higher-price point.

These markets should offer exceptional service and employ knowledgeable staff. They can be relatively small, as long as they offer convenient parking. Alternatively, meat markets can be a department in a larger specialty grocery store or gourmet foods store.

- **Gourmet Food Store** (2,800 sf; 1-2 stores): establishments that stock and sell high-quality, unique or hard-to-find ingredients needed to prepare gourmet dishes. As a result of their higher price-point, these stores will primarily appeal to members of the more affluent *Savvy Suburbanites* lifestyle group. However, they are frequented by all other demographic groups for special occasions.

Like meat markets, these stores need to offer exceptional service and employ knowledgeable staff. Gourmet food stores should be located in a prime location on Main Street, as a department in a larger specialty grocery store or combined with a meat market.

- ***Sporting Goods Stores*** (3,700 sf; 1-2 stores): This industry comprises establishments primarily engaged in retailing new sporting goods, such as bicycles and bicycle parts; camping equipment; exercise and fitness equipment, athletic uniforms; specialty footwear; and other sporting goods, equipment and accessories. These stores can either be located along Main Street or in a grocery anchored shopping center along Grand River Avenue. These stores should offer depth of merchandise (including team uniforms) and brands, as well as exceptional service to compete with discount stores.

Although these stores have broad appeal, they will be most often visited by members of *The Great Outdoors, Green Acres, Soccer Moms, Savvy Suburbanites, Parks and Rec* and *Brighton Young Professionals*. Residents belonging to these groups are the most passionate about maintaining an active lifestyle and participating in sports (ranging from golf to fishing). Since sporting goods stores have to compete with big box stores, they need to specialize and offer excellent customer service.

- ***Hobby, Toy & Game Stores*** (2,900 sf; 1-2 stores): This industry comprises establishments primarily engaged in retailing new toys, games, and hobby and craft supplies (except needlecraft). They should specialize in 2 to 3 categories such as games, crafts, or hobbies such as models, dolls, infants, antiques, etc. These stores' customers will primarily be from upscale lifestyle groups with young children or grandchildren such as *Soccer Moms, Savvy Suburbanites, Exurbanites* and *Professional Pride*. Ideally, these stores should be in prime downtown locations. The hobby, toy or game stores will likely be an independent startup store or an existing regional store seeking to deploy a duplicate in a nearby location such as Learning Express Toys, Lexi's Toy Box, Mudpuddle, Random Games & Toys, The Rocket Gifts, Toys and Thomas Toys Wall of Fame.
- ***Bars, Breweries & Pubs*** (3,800 sf; 2 restaurants): These mid-priced food and beverage establishments, known as bars, taverns, breweries, pubs, nightclubs or drinking places, are primarily engaged in preparing and serving alcoholic beverages for immediate consumption. They sell popular foods such as burgers, tacos and wings with a focus on quantity rather than quality. The most common lifestyle groups in Brighton that regularly frequent these establishments are younger or single *Rustbelt Traditions, Parks and Rec, Bright Young Professionals* and *Metro Fusion*.

These establishments can have modestly finished interiors with flexible seating. So new bars, breweries or pubs do not have to directly compete with those that are currently on Main Street, they should open in one of the shopping centers along Grand River Avenue. Note: these businesses do not promote much cross-shopping with upscale stores such as men's, women's and children's apparel, gifts, specialty foods, toys or home furnishings.

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- **Casual Family Restaurants** (6,500 sf; 3 restaurants): an eating venue that serves relatively simple food at reasonable prices and welcomes children as well as adults. To reinforce their family atmosphere, these restaurants typically do not offer beer, wine or liquor. They should focus on either breakfast and lunch or lunch and dinner. In some cases, particularly if these restaurants are located in suburban shopping centers, they can offer 24-hour service.

Casual family restaurants should be exceptionally clean, with well-maintained furnishings and natural light. These restaurants especially appeal to members of lifestyle groups with younger children like *Soccer Moms* and *Middleburg*, but also to most other demographic groups seeking value and good service. Given the downtown's Mill Pond and family orientation, at least one well-maintained and well-designed casual family restaurant (with seating for 50 to 80 people) could be supportable along Main Street near the park. A list of family restaurants seeking new locations in Michigan is included in this report's supporting memorandum.

- **Diners** (1,900 sf; 1-2 restaurants): A small, casual and relatively inexpensive sit-down restaurant where customers can eat any meal (breakfast, lunch or dinner) at any time throughout the day. These restaurants, with their more reasonable price-points and casual atmosphere, are particularly appealing to members of the *Rustbelt Traditions* and *Middleburg* lifestyle groups.
- **Fast Casual Restaurants** (6,300 sf; 3 restaurants): These restaurants are a blend between fast-food dining and casual dining. Fast casual restaurants feature a more upscale and diverse menu selection compared to fast-food establishments. But, like fast-food establishments, fast casual restaurants do not have table service. Fast casual restaurants should focus on one food type such as pizza, burgers, Mexican salads or vegan, and should be able to seat 40 to 80 customers.

These restaurants have broad appeal across various lifestyle groups. However, they are especially popular with budget aware *Rustbelt Traditions* consumers and the larger families of *Middleburg* and *Soccer Moms*. Most fast casual chain restaurants prefer to be located close to freeway interchanges or in stand-alone buildings in larger shopping centers. These types of restaurants were the most frequently requested business for the downtown, and 2 to 3 of them could be supported along Main Street with targeted business recruitment efforts. Almost all of them require drive-thru windows and large parking lots. Possible fast casual restaurants for downtown Brighton or the Grand River corridor could include: Honey Baked Ham,

- **Delicatessens** (1,600 sf; 1 restaurant): eatery selling foods already prepared or requiring little preparation for serving such as cooked meats, cheese, salads, etc. Since the food at delicatessens is more costly than at a regular grocery, its regular customers would tend to come from more well-to-do lifestyle groups such as *Savvy Suburbanites* and *Soccer Moms*. However, delis also appeal to members of other groups who are shopping for a special

occasion or for special diets. These establishments should seat 40 to 60 people and offer convenient carry-out. Delis should offer generous breakfasts and lunches with exceptional meats, cheeses and baked goods. A new deli would be an ideal addition to Main Street, as it will draw more customers into the downtown for lunch. The deli restaurants will likely be opened as an independent business or an existing business seeking to expand in their region. Possible delicatessens may include: McAlister's Deli, Potbelly, Stage Deli, Which Wich, Zingerman's,

Bakery, Coffee, Ice Cream, etc. (2,000 sf; 2 restaurants): This is a catch-all restaurant subcategory that includes bakeries, coffee shops, ice cream parlors and other similar establishments. The businesses should focus on handcrafted beverages and fresh baked goods. It should offer especially good service in an upscale, well-appointed setting. A regional or national coffee brand would appeal to a wide range of the Brighton area's households, however they are generally only deploying new stores with drive-thru access. Under best practices, the downtown could support 2 more coffee shops. Potential businesses include: BakeHouse 46, Ben & Jerry's, Chelsea Bakery, Crust Bakery, Kilwin's Chocolates, Nestle Toll House Café, RoosRoast Coffee, Sweetwater's Coffee & Tea and Three Dog Bakery.

RATIONALE

The rationale for the findings in this study is as follows:

- **Residential population and household income growth:** The primary trade area includes a stable and steadily growing population with above average household incomes. Indeed, the primary trade area's projected population growth rate over the next five years is more than triple the growth rate for the State of Michigan. Also, the average household income in the primary trade area (\$106,700) is markedly higher than state and national figures and is projected to continue to grow over the next five years.
- **Favorable regional access:** Downtown Brighton's central location is advantageous for retail growth. The downtown is ideally situated near the crossroads of I-96 and US-23, two of the most heavily traveled routes in the region. Additionally, downtown Brighton is just 18 miles north of Ann Arbor and 40 miles northwest of Detroit.
- **New Residential Development:** Several residential projects are currently planned or under construction in downtown Brighton which will increase the number of potential consumers in the immediate area.
- **Streetscape Plan:** The recent City of Brighton Streetscape Plan developed by Giffels Webster will greatly enhance the downtown's public realm, improve walkability and help generate more customer traffic for retailers and restaurants

DEFINITIONS

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 and footwear).

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 one of the following food services (2) a location designated by the customer; or (3) from motorized vehicles or non-motorized 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. Management staff is always provided by the food services contractor.
- **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 hot dog carts and ice cream trucks.

Drinking Places (Alcoholic Beverages) (7224): establishments primarily engaged in preparing and serving alcoholic beverages for immediate consumption (bars, taverns, nightclubs).

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.

LIMITS OF STUDY

The findings of this study represent GPG’s best estimates for the amounts and types of retailers and restaurants that may be reasonably supportable in downtown Brighton. 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. Information discussed by individuals and in focus groups have not been independently verified by GPG.

This study is based on estimates, assumptions, and other information developed by GPG independent research, 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 downtown Brighton. 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 25 May 2021 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. The actual amounts of supportable retail could be significantly higher or lower depending on multiple market and not market factors including the type, design and quality of the new development

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.

END OF STUDY

Data for all businesses in area			
Total Businesses:		5,579	
Total Employees:		64,672	
Total Residential Population:		778,331	
Employee/Residential Population Ratio (per 100 Residents)		36	
by SIC Codes	Businesses	Employees	
	Number	Percent	Number Percent
Agriculture & Mining	74	3.2%	1,776 18%
Construction	537	9.7%	3,515 5.4%
Manufacturing	259	4.7%	8,538 13.2%
Transportation	100	1.8%	1,270 2.0%
Communication	33	0.6%	188 0.3%
Utility	28	0.5%	368 0.6%
Wholesale Trade	232	4.2%	2,358 3.6%
Retail Trade Summary			
Home Improvement	1,121	20.3%	15,103 23.4%
General Merchandise Stores	88	1.6%	1,034 1.6%
Food Stores	33	0.6%	1,108 1.7%
Auto Dealers, Gas Stations, Auto Aftersales	86	1.6%	1,927 3.0%
Apparel & Accessory Stores	134	2.4%	1,748 2.7%
Furniture & Home Furnishings	67	1.2%	491 0.8%
Eating & Drinking Places	79	1.4%	629 1.0%
Miscellaneous Retail	311	5.6%	5,830 9.0%
	324	5.9%	2,337 3.6%
Finance, Insurance, Real Estate Summary			
Banks, Savings & Lending Institutions	477	8.6%	4,893 7.6%
Securities Brokers	85	1.5%	1,082 1.7%
Insurance Carriers & Agents	69	1.3%	226 0.3%
Real Estate, Holding, Other Investment Offices	130	2.4%	1,356 2.1%
	193	3.5%	2,229 3.4%
Services Summary			
Hotels & Lodging	2,096	38.0%	23,749 36.7%
Automotive Services	32	0.6%	948 1.5%
Motion Pictures & Amusements	149	2.7%	806 1.2%
Health Services	171	3.1%	2,125 3.3%
Legal Services	372	6.7%	5,378 8.3%
Education Institutions & Libraries	91	1.6%	385 0.6%
Other Services	105	1.9%	4,200 6.5%
	1,177	21.3%	9,908 15.3%
Government	121	2.2%	3,261 5.0%
Unclassified Establishments	340	6.2%	253 0.4%
Totals	5,579	100.0%	64,672 100.0%

Source: Copyright 2020 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2020.
Date Note: Data on the Business Summary report is calculated Esri's Data allocation which uses census block groups to allocate business summary data to custom areas.

Appendix A2: Primary Trade Area Business Summary

Gibbs Planning Group

Business Summary

Primary Trade Area

Area: 415.47 square miles

Prepared by Esri

by NAICS Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	30	0.5%	28	0.3%
Mining	3	0.1%	84	0.3%
Utilities	8	0.1%	231	0.4%
Construction	559	10.7%	3,619	5.6%
Manufacturing	282	5.7%	8,583	13.3%
Wholesale Trade	229	4.7%	2,343	3.6%
Retail Trade	773	14.0%	9,019	13.9%
Motor Vehicle & Parts Dealers	87	1.6%	1,417	2.2%
Furniture & Home Furnishings Stores	41	0.7%	409	0.6%
Electronics & Appliance Stores	22	0.4%	76	0.3%
Bldg Material & Garden Equipment & Supplies Dealers	86	1.6%	1,08	1.6%
Food & Beverage Stores	69	1.3%	1,703	2.6%
Health & Personal Care Stores	75	1.4%	614	0.9%
Gasoline Stations	47	0.9%	331	0.5%
Clothing & Clothing Accessories Stores	86	1.6%	557	0.9%
Sport Goods, Hobby, Book, & Music Stores	54	1.0%	377	0.6%
General Merchandise Stores	33	0.6%	1,108	1.7%
Miscellaneous Store Retailers	135	2.4%	1,261	1.9%
Nonstore Retailers	37	0.7%	48	0.1%
Transportation & Warehousing	81	1.5%	772	1.2%
Information	73	1.3%	668	1.0%
Finance & Insurance	286	5.2%	2,670	4.4%
Central Bank/Credit Intermediation & Related Activities	86	1.6%	1,084	1.7%
Securities, Commodity/Contracts & Other Financial	69	1.3%	226	0.3%
Insurance Carriers & Related Activities; Funds, Trusts & Other	130	2.4%	1,360	2.4%
Real Estate, Rental & Leasing	227	4.7%	2,453	3.3%
Professional, Scientific & Tech Services	520	9.4%	5,925	9.2%
Legal Services	105	1.9%	480	0.7%
Management of Companies & Enterprises	11	0.2%	65	0.2%
Administrative & Support & Waste Management & Remediation	237	4.3%	1,321	2.0%
Educational Services	133	2.4%	4,216	6.5%
Health Care & Social Assistance	490	8.9%	7,010	10.8%
Arts, Entertainment & Recreation	137	2.5%	1,991	3.4%
Accommodation & Food Services	350	6.3%	6,906	10.7%
Accommodation	32	0.6%	948	1.5%
Food Services & Drinking Places	318	5.8%	5,958	9.2%
Other Services (except Public Administration)	631	11.4%	3,184	4.9%
Automotive Repair & Maintenance	16	2.1%	665	1.0%
Public Administration	121	2.2%	3,252	5.0%
Unclassified Establishments	339	6.7%	247	0.4%
Total	5,519	100.0%	64,672	100.0%

Source: Copyright 2020 Info group, Inc. All rights reserved. Esri Total Residential Population forecasts for 2020.

Date Note: Data on the Business Summary report is calculated Esri's Data allocation which uses census block groups to allocate business summary data to custom areas.

Appendix B1: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

Primary Trade Area
Area: 415.47 square miles

Prepared by Esri

Population Summary	
2000 Total Population	139,882
2010 Total Population	163,150
2020 Total Population	178,331
2020 Group Quarters	1,385
2025 Total Population	186,008
2020-2025 Annual Rate	0.85%
2020 Total Daytime Population	168,175
Workers	68,878
Residents	99,297
Household Summary	
2000 Households	50,267
2000 Average Household Size	2.75
2010 Households	61,471
2010 Average Household Size	2.64
2020 Households	68,023
2020 Average Household Size	2.60
2025 Households	71,277
2025 Average Household Size	2.59
2020-2025 Annual Rate	0.94%
2010 Families	45,182
2010 Average Family Size	3.09
2020 Families	49,257
2020 Average Family Size	3.06
2025 Families	51,367
2025 Average Family Size	3.05
2020-2025 Annual Rate	0.84%
Housing Unit Summary	
2000 Housing Units	53,230
Owner Occupied Housing Units	81.8%
Renter Occupied Housing Units	12.6%
Vacant Housing Units	5.6%
2010 Housing Units	66,276
Owner Occupied Housing Units	77.9%
Renter Occupied Housing Units	14.9%
Vacant Housing Units	7.2%
2020 Housing Units	72,883
Owner Occupied Housing Units	79.7%
Renter Occupied Housing Units	13.7%
Vacant Housing Units	6.7%
2025 Housing Units	76,318
Owner Occupied Housing Units	79.6%
Renter Occupied Housing Units	13.8%
Vacant Housing Units	6.6%
Median Household Income	
2020	\$83,384
2025	\$88,690
Median Home Value	
2020	\$246,697
2025	\$265,631
Per Capita Income	
2020	\$40,703
2025	\$44,920
Median Age	
2010	40.5
2020	42.5
2025	43.2

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 2020 and 2025 Esri converted Census 2000 data into 2010 geography.

Appendix B2: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

Primary Trade Area
Area: 415.47 square miles

Prepared by Esri

2020 Households by Income	
Household Income Base	68,023
<\$15,000	5.4%
\$15,000 - \$24,999	4.9%
\$25,000 - \$34,999	6.6%
\$35,000 - \$49,999	10.3%
\$50,000 - \$74,999	16.5%
\$75,000 - \$99,999	15.6%
\$100,000 - \$149,999	20.4%
\$150,000 - \$199,999	10.7%
\$200,000+	9.6%
Average Household Income	\$106,686
2025 Households by Income	
Household Income Base	71,277
<\$15,000	4.7%
\$15,000 - \$24,999	4.4%
\$25,000 - \$34,999	6.0%
\$35,000 - \$49,999	9.6%
\$50,000 - \$74,999	15.7%
\$75,000 - \$99,999	15.4%
\$100,000 - \$149,999	21.2%
\$150,000 - \$199,999	12.1%
\$200,000+	10.9%
Average Household Income	\$117,214
2020 Owner Occupied Housing Units by Value	
Total	58,070
<\$50,000	4.6%
\$50,000 - \$99,999	4.0%
\$100,000 - \$149,999	8.4%
\$150,000 - \$199,999	14.0%
\$200,000 - \$249,999	20.4%
\$250,000 - \$299,999	16.6%
\$300,000 - \$399,999	18.5%
\$400,000 - \$499,999	7.4%
\$500,000 - \$749,999	4.6%
\$750,000 - \$999,999	1.0%
\$1,000,000 - \$1,499,999	0.3%
\$1,500,000 - \$1,999,999	0.1%
\$2,000,000 +	0.2%
Average Home Value	\$275,012
2025 Owner Occupied Housing Units by Value	
Total	60,774
<\$50,000	3.3%
\$50,000 - \$99,999	2.6%
\$100,000 - \$149,999	6.6%
\$150,000 - \$199,999	11.9%
\$200,000 - \$249,999	19.9%
\$250,000 - \$299,999	18.1%
\$300,000 - \$399,999	21.0%
\$400,000 - \$499,999	9.0%
\$500,000 - \$749,999	5.8%
\$750,000 - \$999,999	1.2%
\$1,000,000 - \$1,499,999	0.3%
\$1,500,000 - \$1,999,999	0.1%
\$2,000,000 +	0.2%
Average Home Value	\$297,044

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 2020 and 2025 Esri converted Census 2000 data into 2010 geography.

Appendix B3: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

Primary Trade Area
Area: 415.47 square miles

Prepared by Esri

2010 Population by Age	
Total	163,151
0 - 4	5.7%
5 - 9	7.1%
10 - 14	8.0%
15 - 24	11.8%
25 - 34	10.1%
35 - 44	14.5%
45 - 54	17.6%
55 - 64	13.1%
65 - 74	7.0%
75 - 84	3.6%
85 +	1.5%
18 +	74.4%
2020 Population by Age	
Total	178,331
0 - 4	5.2%
5 - 9	5.9%
10 - 14	6.7%
15 - 24	11.5%
25 - 34	11.6%
35 - 44	12.1%
45 - 54	14.5%
55 - 64	15.6%
65 - 74	10.6%
75 - 84	4.6%
85 +	1.8%
18 +	78.2%
2025 Population by Age	
Total	186,006
0 - 4	5.2%
5 - 9	5.7%
10 - 14	6.4%
15 - 24	10.4%
25 - 34	11.6%
35 - 44	13.0%
45 - 54	12.7%
55 - 64	14.7%
65 - 74	12.2%
75 - 84	6.2%
85 +	1.9%
18 +	79.0%
2010 Population by Sex	
Males	81,147
Females	82,003
2020 Population by Sex	
Males	88,686
Females	89,645
2025 Population by Sex	
Males	92,462
Females	93,546

Source: U.S. Census Bureau, Census 2010 Summary File 1 Esri forecasts for 2020 and 2025 Esri converted Census 2000 data into 2010 geography.

Appendix B4: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

Primary Trade Area
Area: 415.47 square miles

Prepared by Esri

2010 Population by Race/Ethnicity	
Total	163,150
White Alone	96.4%
Black Alone	0.6%
American Indian Alone	0.4%
Asian Alone	0.9%
Pacific Islander Alone	0.0%
Some Other Race Alone	0.4%
Two or More Races	1.3%
Hispanic Origin	2.1%
Diversity Index	10.9
2020 Population by Race/Ethnicity	
Total	178,331
White Alone	95.2%
Black Alone	0.8%
American Indian Alone	0.4%
Asian Alone	1.2%
Pacific Islander Alone	0.1%
Some Other Race Alone	0.6%
Two or More Races	1.7%
Hispanic Origin	2.9%
Diversity Index	14.6
2025 Population by Race/Ethnicity	
Total	186,009
White Alone	94.5%
Black Alone	0.9%
American Indian Alone	0.5%
Asian Alone	1.4%
Pacific Islander Alone	0.1%
Some Other Race Alone	0.6%
Two or More Races	2.0%
Hispanic Origin	3.5%
Diversity Index	16.6
2010 Population by Relationship and Household Type	
Total	163,150
In Households	99.3%
In Family Households	87.1%
Householder	27.7%
Spouse	23.0%
Child	32.8%
Other relative	2.0%
Nonrelative	1.6%
In Nonfamily Households	12.2%
In Group Quarters	0.7%
Institutionalized Population	0.5%
Noninstitutionalized Population	0.2%

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 2020 and 2025 Esri converted Census 2000 data into 2010 geography.

Appendix B5: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

Primary Trade Area
Area: 415.47 square miles

Prepared by Esri

2020 Population 25+ by Educational Attainment	
Total	126,174
Less than 9th Grade	1.1%
9th - 12th Grade, No Diploma	3.1%
High School Graduate	21.6%
GED/Alternative Credential	2.7%
Some College, No Degree	23.3%
Associate Degree	9.9%
Bachelor's Degree	25.3%
Graduate/Professional Degree	13.1%
2020 Population 15+ by Marital Status	
Total	146,763
Never Married	26.0%
Married	58.5%
Widowed	5.2%
Divorced	10.3%
2020 Civilian Population 16+ in Labor Force	
Civilian Population 16+	97,167
Population 16+ Employed	81.7%
Population 16+ Unemployment rate	18.3%
Population 16-24 Employed	11.3%
Population 16-24 Unemployment rate	28.2%
Population 25-54 Employed	61.8%
Population 25-54 Unemployment rate	16.8%
Population 55-64 Employed	20.6%
Population 55-64 Unemployment rate	17.1%
Population 65+ Employed	6.3%
Population 65+ Unemployment rate	16.9%
2020 Employed Population 16+ by Industry	
Total	79,350
Agriculture/Mining	0.4%
Construction	8.5%
Manufacturing	20.3%
Wholesale Trade	3.4%
Retail Trade	9.2%
Transportation/Utilities	3.7%
Information	1.4%
Finance/Insurance/Real Estate	7.2%
Services	43.1%
Public Administration	2.8%
2020 Employed Population 16+ by Occupation	
Total	79,351
White Collar	68.0%
Management/Business/Financial	19.4%
Professional	25.6%
Sales	10.6%
Administrative Support	12.4%
Services	11.5%
Blue Collar	20.5%
Farming/Forestry/Fishing	0.2%
Construction/Extraction	6.0%
Installation/Maintenance/Repair	3.1%
Production	6.7%
Transportation/Material Moving	4.5%

Source: U.S. Census Bureau, Census 2010 Summary File 1 Esri forecasts for 2020 and 2025 Esri converted Census 2000 data into 2010 geography.

Appendix B6: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

Primary Trade Area
Area: 415.47 square miles

Prepared by Esri

2010 Households by Type	
Total	61,471
Households with 1 Person	21.6%
Households with 2+ People	78.4%
Family Households	73.5%
Husband- wife Families	61.1%
With Related Children	27.6%
Other Family (No Spouse Present)	12.4%
Other Family with Male Householder	4.1%
With Related Children	2.4%
Other Family with Female Householder	8.4%
With Related Children	5.2%
Nonfamily Households	4.9%
All Households with Children	35.7%
Multigenerational Households	2.5%
Unmarried Partner Households	5.6%
Male- female	5.1%
Same- sex	0.5%
2010 Households by Size	
Total	61,473
1 Person Household	21.6%
2 Person Household	35.1%
3 Person Household	16.6%
4 Person Household	16.6%
5 Person Household	6.8%
6 Person Household	2.2%
7 + Person Household	1.1%
2010 Households by Tenure and Mortgage Status	
Total	61,471
Owner Occupied	84.0%
Owned with a Mortgage/Loan	65.4%
Owned Free and Clear	18.6%
Renter Occupied	16.0%
2020 Affordability, Mortgage and Wealth	
Housing Affordability Index	172
Percent of Income for Mortgage	12.4%
Wealth Index	140
2010 Housing Units By Urban/ Rural Status	
Total Housing Units	66,276
Housing Units Inside Urbanized Area	71.1%
Housing Units Inside Urbanized Cluster	2.7%
Rural Housing Units	26.3%
2010 Population By Urban/ Rural Status	
Total Population	163,150
Population Inside Urbanized Area	68.5%
Population Inside Urbanized Cluster	2.5%
Rural Population	29.0%

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 2020 and 2025 Esri converted Census 2000 data into 2010 geography.

Appendix B7: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

Primary Trade Area
Area: 415.47 square miles

Prepared by Esri

Top 3 Tapestry Segments		
1.		Green Acres (6A)
2.		Soccer Moms (4A)
3.		Savvy Suburbanites (1D)
2020 Consumer Spending		
Apparel & Services: Total \$		
	Average Spent	\$170,110,159
	Spending Potential Index	\$2,500.77
	Spending Potential Index	117
Education: Total \$		
	Average Spent	\$144,731,602
	Spending Potential Index	\$2,127.69
	Spending Potential Index	119
Entertainment/Recreation: Total \$		
	Average Spent	\$261,474,499
	Average Spent	\$3,843.91
	Spending Potential Index	118
Food at Home: Total \$		
	Average Spent	\$418,507,456
	Average Spent	\$6,152.44
	Spending Potential Index	115
Food Away from Home: Total \$		
	Average Spent	\$297,105,940
	Average Spent	\$4,367.73
	Spending Potential Index	116
Health Care: Total \$		
	Average Spent	\$469,796,502
	Average Spent	\$6,906.44
	Spending Potential Index	120
HH Furnishings & Equipment: Total \$		
	Average Spent	\$179,717,433
	Average Spent	\$2,642.01
	Spending Potential Index	121
Personal Care Products & Services: Total \$		
	Average Spent	\$74,551,111
	Average Spent	\$1,095.97
	Spending Potential Index	119
Shelter: Total \$		
	Average Spent	\$1,515,593,153
	Average Spent	\$22,280.60
	Spending Potential Index	115
Support Payments/Cash Contributions/Gifts in Kind: Total \$		
	Average Spent	\$195,879,977
	Average Spent	\$2,879.61
	Spending Potential Index	123
Travel: Total \$		
	Average Spent	\$199,194,714
	Average Spent	\$2,928.34
	Spending Potential Index	121
Vehicle Maintenance & Repairs: Total \$		
	Average Spent	\$93,227,916
	Average Spent	\$1,370.54
	Spending Potential Index	118

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 2017 and 2018 Consumer Expenditure Surveys, Bureau of Labor Statistics, Esri.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2020 and 2025 Esri converted Census 2000 data into 2010 geography.

Appendix C1: Primary Trade Area Housing Profile

Gibbs Planning Group

Housing Profile

Primary Trade Area
Area: 415.47 square miles

Prepared by Esri

Population		Households	
2010 Total Population	163,150	2020 Median Household Income	\$83,384
2020 Total Population	178,331	2025 Median Household Income	\$88,690
2025 Total Population	186,008	2020-2025 Annual Rate	1.24%
2020-2025 Annual Rate	0.85%		

Housing Units by Occupancy Status and Tenure	Census 2010		2020		2025	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	66,276	100.0%	72,883	100.0%	76,318	100.0%
Occupied	61,471	92.8%	68,023	93.3%	71,277	93.4%
Owner	51,608	77.9%	58,070	79.7%	60,774	79.6%
Renter	9,863	14.9%	9,953	13.7%	10,503	13.8%
Vacant	4,805	7.2%	4,860	6.7%	5,041	6.6%

Owner Occupied Housing Units by Value	2020		2025	
	Number	Percent	Number	Percent
Total	58,070	100.0%	60,773	100.0%
<\$50,000	2,660	4.6%	1,997	3.3%
\$50,000-\$99,999	2,321	4.0%	1,605	2.6%
\$100,000-\$149,999	4,879	8.4%	4,020	6.6%
\$150,000-\$199,999	8,119	14.0%	7,246	11.9%
\$200,000-\$249,999	11,838	20.4%	12,080	19.9%
\$250,000-\$299,999	9,640	16.6%	10,999	18.1%
\$300,000-\$399,999	10,732	18.5%	12,739	21.0%
\$400,000-\$499,999	4,322	7.4%	5,445	9.0%
\$500,000-\$749,999	2,654	4.6%	3,519	5.8%
\$750,000-\$999,999	596	1.0%	749	1.2%
\$1,000,000-\$1,499,999	173	0.3%	212	0.3%
\$1,500,000-\$1,999,999	39	0.1%	49	0.1%
\$2,000,000+	97	0.2%	113	0.2%
Median Value	\$246,697		\$265,631	
Average Value	\$275,012		\$297,044	

Census 2010 Housing Units	Number	Percent
Total	66,276	100.0%
In Urbanized Areas	47,090	71.1%
In Urban Clusters	1,761	2.7%
Rural Housing Units	17,425	26.3%

Data Note: Persons of Hispanic Origin may be of any race.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2020 and 2025.

Appendix C2: Primary Trade Area Housing Profile

Gibbs Planning Group

Housing Profile

Primary Trade Area
Area: 415.47 square miles

Prepared by Esri

Census 2010 Owner Occupied Housing Units by Mortgage Status			Number	Percent
Total			51,609	100.0%
Owned with a Mortgage/Loan			40,206	77.9%
Owned Free and Clear			11,403	22.1%

Census 2010 Vacant Housing Units by Status			Number	Percent
Total			4,736	100.0%
For Rent			1,146	24.2%
Rented- Not Occupied			65	1.4%
For Sale Only			1,145	24.2%
Sold - Not Occupied			211	4.5%
Seasonal/Recreational/Occasional Use			1,179	24.9%
For Migrant Workers			12	0.3%
Other Vacant			978	20.7%

Census 2010 Occupied Housing Units by Age of Householder and Home Ownership			
	Occupied	Owner Occupied Units	
		Number	% of Occupied
Total	61,472	51,608	84.0%
15-24	1,401	477	34.0%
25-34	6,995	4,636	66.3%
35-44	12,287	10,280	83.7%
45-54	15,888	13,929	87.7%
55-64	12,261	11,169	91.1%
65-74	7,128	6,590	92.5%
75-84	3,927	3,447	87.8%
85+	1,585	1,080	68.1%

Census 2010 Occupied Housing Units by Race/Ethnicity of Householder and Home Ownership			
	Occupied	Owner Occupied Units	
		Number	% of Occupied
Total	61,471	51,608	84.0%
White Alone	59,908	50,543	84.4%
Black/African American	266	165	62.0%
American Indian/Alaska	230	156	67.8%
Asian Alone	418	324	77.5%
Pacific Islander Alone	18	7	38.9%
Other Race Alone	175	96	54.9%
Two or More Races	456	317	69.5%
Hispanic Origin	872	608	69.7%

Census 2010 Occupied Housing Units by Size and Home Ownership			
	Occupied	Owner Occupied Units	
		Number	% of Occupied
Total	61,473	51,609	84.0%
1- Person	13,273	9,295	70.0%
2- Person	21,556	18,852	87.5%
3- Person	10,229	8,783	85.9%
4- Person	10,225	9,182	89.8%
5- Person	4,208	3,770	89.6%
6- Person	1,329	1,151	86.6%
7+ Person	653	576	88.2%

2020 Housing Affordability	
Housing Affordability Index	172
Percent of Income for Mortgage	12.4%

Data Note: Persons of Hispanic Origin may be of any race.

Source: U.S. Census Bureau, Census 2010 Summary File 1 Esri forecasts for 2020 and 2025.

Appendix D1: Primary Trade Area Dominant Tapestry Descriptions

Gibbs Planning Group

Tapestry Segmentation Area Profile

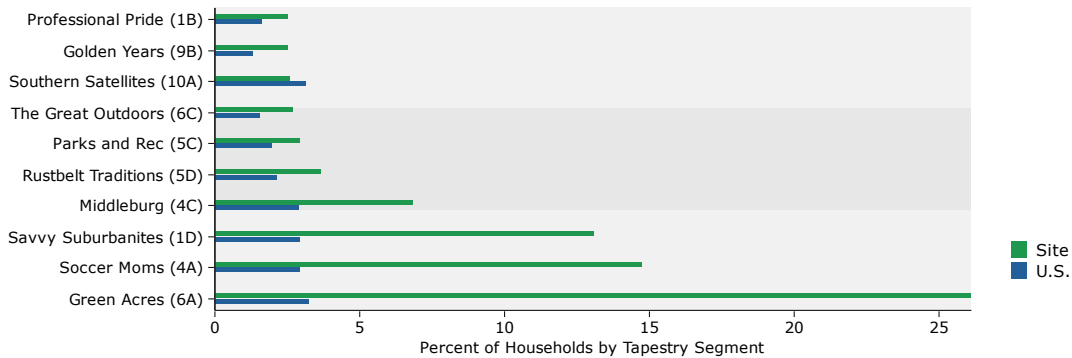
Primary Trade Area
Area: 415.47 square miles

Prepared by Esri

Top Twenty Tapestry

Rank	Tapestry Segment	2020 Households		2020 U.S. Households		Index
		Percent	Cumulativ Percent	Percent	Cumulativ Percent	
1	Green Acres (6A)	26.1%	26.1%	3.2%	3.2%	806
2	Soccer Moms (4A)	14.8%	40.9%	3.0%	6.2%	500
3	Savvy Suburbanites (1D)	13.1%	53.9%	3.0%	9.2%	440
4	Middleburg (4C)	6.9%	60.8%	2.9%	12.1%	233
5	Rustbelt Traditions (5D)	3.7%	64.5%	2.2%	14.3%	169
	Subtotal	64.6%		14.3%		
6	Parks and Rec (5C)	3.0%	67.4%	2.0%	16.3%	151
7	The Great Outdoors (6C)	2.7%	70.2%	1.6%	17.9%	174
8	Southern Satellites (10A)	2.6%	72.8%	3.2%	21.1%	82
9	Golden Years (9B)	2.5%	75.3%	1.3%	22.4%	190
10	Professional Pride (1B)	2.5%	77.8%	1.6%	24.0%	155
	Subtotal	13.3%		9.7%		
11	Bright Young Professionals (8C)	2.5%	80.3%	2.3%	26.3%	110
12	Old and Newcomers (8F)	2.2%	82.5%	2.3%	28.6%	95
13	Down the Road (10D)	2.1%	84.6%	1.2%	29.8%	180
14	Exurbanites (1E)	2.0%	86.6%	1.9%	31.7%	106
15	Comfortable Empty Nesters (5A)	1.9%	88.5%	2.4%	34.1%	76
	Subtotal	10.7%		10.1%		
16	Metro Fusion (11C)	1.7%	90.2%	1.4%	35.5%	119
17	Retirement Communities (9E)	1.5%	91.7%	1.2%	36.7%	128
18	Set to Impress (11D)	1.3%	93.0%	1.4%	38.1%	97
19	Boomburbs (1C)	1.2%	94.2%	1.8%	39.9%	65
20	The Elders (9C)	1.0%	95.2%	0.7%	40.6%	135
	Subtotal	6.7%		6.5%		
	Total	95.2%		40.6%		235

Top Ten Tapestry Segments Site vs. 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 in the area, by Tapestry segment, to the percent of households or Total Population in the United States, by segment. An index of 100 is the US average.
Source: Esri

Appendix D2: Primary Trade Area Dominant Tapestry Descriptions



LifeMode Group: Cozy Country Living
Green Acres

6A

Households: 3,923,400
Average Household Size: 2.70
Median Age: 43.9
Median Household Income: \$76,800

WHO ARE WE?

The Green Acres lifestyle features country living and self-reliance. They are avid do-it-yourselfers, maintaining and remodeling their homes, with all the necessary power tools to accomplish the jobs. Gardening, especially growing vegetables, is also a priority, again with the right tools, tillers, tractors, and riding mowers. Outdoor living also features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf. Self-described conservatives, residents of Green Acres remain pessimistic about the near future yet are heavily invested in it.

OUR NEIGHBORHOOD

- Rural enclaves in metropolitan areas, primarily (not exclusively) older homes with acreage; new housing growth in the past 15 years.
- Single-family, owner-occupied housing, with a median value of \$235,500.
- An older market, primarily married couples, most with no children.


SOCIOECONOMIC TRAITS

- Education: More than 60% are college educated.
- Unemployment is low at 3.8% (Index 70); labor force participation rate is high at 66.8% (Index 107).
- Income is derived not only from wages and salaries but also from self-employment (more than 13% of households), investments (27% of households), and increasingly, from retirement.
- They are cautious consumers with a focus on quality and durability.
- Comfortable with technology, more as a tool than a trend: banking or paying bills online is convenient, but the Internet is not viewed as entertainment.
- Economic outlook is professed as pessimistic, but consumers are comfortable with debt, primarily as home and auto loans, and investments.



Note: The Index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

Appendix D3: Primary Trade Area Dominant Tapestry Descriptions



LifeMode Group: Family Landscapes

Soccer Moms

4A

Households: 3,541,300

Average Household Size: 2.97

Median Age: 37.0

Median Household Income: \$90,500

WHO ARE WE?

Soccer Moms is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.

OUR NEIGHBORHOOD

- Soccer Moms residents prefer the suburban periphery of metropolitan areas.
- Predominantly single family, homes are in newer neighborhoods, 34% built in the 1990s (Index 236), 31% built since 2000.
- Owner-occupied homes have high rate of mortgages at 68% (Index 164), and low rate vacancy at 4%.
- Median home value is \$257,400.
- Most households are married couples with children; average household size is 2.97.
- Most households have 2 or 3 vehicles; long travel time to work including a disproportionate number commuting from a different county (Index 132).


SOCIOECONOMIC TRAITS

- Education: 40.5% college graduates; more than 72% with some college education.
- Low unemployment at 3.8%; high labor force participation rate at 71%; 2 out of 3 households include 2+ workers (Index 124).
- Connected, with a host of wireless devices from iPods to tablets—anything that enables convenience, like banking, paying bills, or even shopping online.
- Well insured and invested in a range of funds, from savings accounts or bonds to stocks.
- Carry a higher level of debt, including first (Index 149) and second mortgages (Index 154) and auto loans (Index 149).



Note: The index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by CMAA, LLC.

Appendix D4: Primary Trade Area Dominant Tapestry Descriptions



LifeMode Group: Affluent Estates


Savvy Suburbanites

Households: 3,664,200

Average Household Size: 2.85

Median Age: 45.1

Median Household Income: \$108,700



WHO ARE WE?

Savvy Suburbanites residents are well educated, well read, and well capitalized. Families include empty nesters and empty nester wannabes, who still have adult children at home. Located in older neighborhoods outside the urban core, their suburban lifestyle includes home remodeling and gardening plus the active pursuit of sports and exercise. They enjoy good food and wine, plus the amenities of the city's cultural events.

OUR NEIGHBORHOOD

- Established neighborhoods (most built between 1970 and 1990) found in the suburban periphery of large metropolitan markets.
- Married couples with no children or older children; average household size is 2.85.
- 91% owner occupied; 66% mortgaged (Index 160).
- Primarily single-family homes, with a median value of \$362,900 (Index 161).
- Low vacancy rate at 3.8%.

SOCIOECONOMIC TRAITS

- Education: 50.6% college graduates; 77.6% with some college education.
- Low unemployment at 3.5% (Index 65); higher labor force participation rate at 67.9% (Index 109) with proportionately more 2-worker households at 62.2% (Index 120).
- Well-connected consumers that appreciate technology and make liberal use of it for everything from shopping and banking to staying current and communicating.
- Informed shoppers that do their research prior to purchasing and focus on quality.



Note: This index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

Appendix D5: Primary Trade Area Dominant Tapestry Descriptions



LifeMode Group: Family Landscapes

Middleburg

4C

Households: 3,511,200

Average Household Size: 2.75

Median Age: 36.1

Median Household Income: \$59,800

WHO ARE WE?

Middleburg neighborhoods transformed from the easy pace of country living to semirural subdivisions in the last decade, when the housing boom reached out. Residents are conservative, family-oriented consumers. Still more country than rock and roll, they are thrifty but willing to carry some debt and are already investing in their futures. They rely on their smartphones and mobile devices to stay in touch and pride themselves on their expertise. They prefer to buy American and travel in the US. This market is younger but growing in size and assets.

OUR NEIGHBORHOOD

- Semirural locales within metropolitan areas.
- Neighborhoods changed rapidly in the previous decade with the addition of new single-family homes.
- Include a number of mobile homes (index 150).
- Affordable housing, median value of \$175,000 (index 84) with a low vacancy rate.
- Young couples, many with children; average household size is 2.75.


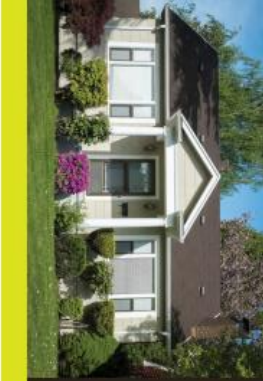
SOCIOECONOMIC TRAITS

- Education: 65% with a high school diploma or some college.
- Unemployment rate lower at 4.7% (index 86).
- Labor force participation typical of a younger population at 66.7% (index 107).
- Traditional values are the norm here—faith, country, and family.
- Prefer to buy American and for a good price.
- Comfortable with the latest in technology, for convenience (online banking or saving money on landlines) and entertainment.



Note: This index represents the ratio of the segment rate to the US rate multiplied by 100. Consumer preferences are estimated from data by GfK MRI.

Appendix D6: Primary Trade Area Dominant Tapestry Descriptions

LifeMode Group: GenXurban

Rustbelt Traditions

Households: 2,716,800

Average Household Size: 2.47

Median Age: 39.0

Median Household Income: \$51,800

5D

WHO ARE WE?

The backbone of older industrial cities in states surrounding the Great Lakes, Rustbelt Traditions residents are a mix of married-couple families and singles living in older developments of single-family homes. While varied, the workforce is primarily white collar, with a higher concentration of skilled workers in manufacturing, retail trade, and health care. Rustbelt Traditions represents a large market of stable, hard-working consumers with modest incomes but an average net worth of nearly \$400,000. Family oriented, they value time spent at home. Most have lived, worked, and played in the same area for years.

OUR NEIGHBORHOOD

- Almost half (46%) of the households are married-couple families, similar to the US (48%), most without children (also similar to the US); the slightly higher proportion of singles (index 105) reflects the aging of the population.
- Average household size is slightly lower at 2.47.
- They are movers, slightly more mobile than the US population (index 109), but over 70 percent of house holders moved into their current homes before 2010.
- Most residents live in modest, single-family homes in older neighborhoods built in the 1950s (index 224).
- Nearly three quarters own their homes; nearly half of households have mortgages.
- A large and growing market, Rustbelt Traditions residents are located in the dense urban fringe of metropolitan areas throughout the Midwest and South.
- Most households have 1 to 2 vehicles available.

SOCIOECONOMIC TRAITS

- Most have graduated from high school or spent some time at a college or university.
- Unemployment below the US at 5.2%; labor force participation slightly higher than the US at 67%.
- While most income derived from wages and salaries, nearly 31% of households collecting Social Security and nearly 20% drawing income from retirement accounts.
- Family-oriented consumers who value time spent at home.
- Most lived, worked, and played in the same area for years.
- Budget aware shoppers that favor American-made products.
- Read newspapers, especially the Sunday editions.



Note: This index represents the ratio of the segment ratio to the US rate multiplied by 100. Consumer preferences are estimated from data by ORC MI.

Regional - National Restaurants and Retailers Considering New Michigan Locations

Note: Businesses not cross referenced for existing Brighton locations

Restaurant - Retailer Name	Max. Sq. Ft.	Retail Categories	Exist. Stores	Next 12 Months	Next 24 Months
& Pizza 4.0	2,200	Restaurant (Family)	39	2	4
16 Handles	2,000	Food or Beverage Specialty	36	1	2
4 Rivers Smokehouse	2,000	Restaurant (w/ Liquor)	15	2	4
5.11 Tactical	5,500	Apparel (Activewear, Specialty), Other, Misc. Retail	74	1	2
50 East Shoes	9,000	Shoes	3	2	4
A'GACI	12,000	Apparel (Women's)	54	1	2
Bad Daddy's Burger Bar	3,700	Restaurant (Family)	36	2	4
Bagger Dave's	4,500	Restaurant (Family)	9	1	2
Baja Bistro	3,000	Restaurant (Family)	13	15	30
Banh Shop	6,000	Tobacco, Cigars	4	2	4
Barcelona Wine & Tapas	6,000	Restaurant (w/ Liquor)	15	2	4
Bareburger	3,000	Food or Beverage Specialty	42	2	4
Barry Bagels	2,400	Bakery	15	2	4
Barry's Bootcamp	4,500	Health, Fitness, Nutrition	55	2	4
Bartaco	6,000	Restaurant (w/ Liquor)	18	2	4
Basecamp Fitness	3,500	Health, Fitness, Nutrition	10	5	10
Baskin Robbins	1,500	Food or Beverage Specialty	8000	200	400
Bassett Furniture	20,000	Home Furnishings	100	10	20
Bd's Mongolian Grill	7,000	Restaurant (w/ Liquor)	22	5	10
Beard Papa's	1,500	Bakery, Food or Beverage Specialty	26	2	5
Beef O'Brady's	6,000	Restaurant (w/ Liquor)	215	12	24
Ben & Jerry's	1,200	Food or Beverage Specialty	593	10	20
Benjamin Moore Paints	4,000	Hardware Store	5000	4	8
BIBIBOP Asian Grill	30,000	Restaurant (Family)	30	2	4
BioLife	18,000	Health, Fitness, Nutrition	99	2	4
Boot Barn	12,000	Shoes	236	5	10
Brighton Collectibles	1,500	Gift Specialties	180	10	20
Calico Corners	4,200	Fabrics, Sewing Supplies	73	1	2
Camilla	4,000	Apparel (Women's)	84	2	3
Carter's	5,000	Apparel (Children's)	1210	5	10
Carvana	10,000	Other, Misc. Retail	100	3	6
Casper	2,500	Furniture	15	100	200
Casual Male XL	4,000	Apparel (Men's)	68	1	2
Cereality	2,000	Food or Beverage Specialty	1	1	2
Champs Sports	5,400	Shoes	541	1	2
Cherrybrook Pet Supply	5,000	Pets, Pet Care, Supplies	5	2	4
Chuy's	7,500	Restaurant (w/ Liquor)	103	2	4
Cinnabon	1,500	Food or Beverage Specialty	1449	25	50

Regional - National Restaurants and Retailers Considering New Michigan Locations

Note: Businesses not cross referenced for existing Brighton locations

Restaurant – Retailers Name	Max. Sq. Ft.	Retail Categories	Exist. Stores	Next 12 Months	Next 24 Months
Clean Juice	1,500	Food or Beverage Specialty	50	2	4
Club Champion	1,600	Sporting Goods	37	1	2
Coffee Bean & Tea Leaf	2,000	Coffee Shop	1200	30	60
Coffee Beanery	1,500	Coffee Shop	120	10	20
Cold Stone Creamery	2,000	Food or Beverage Specialty	1000	150	300
Columbia Sportswear	5,000	Apparel (Family)	134	5	10
Conn's	50,000	Electronics	122	1	2
Copeland's of New Orleans	8,000	Restaurant (w/ Liquor)	15	4	8
Core Life Eatery	3,500	Restaurant (Family)	52	2	4
CORT Furniture Center	12,000	Furniture	100	7	10
Cosi Cafe	3,200	Restaurant (Family)	70	25	50
Cost Plus World Market	18,300	Variety Store	281	1	2
Country Kitchen	5,000	Restaurant (Family)	65	5	10
Cousins Subs	1,600	Food or Beverage Specialty	90	40	75
CowBoy Chicken	3,000	Restaurant (Family)	29	5	10
Cowboy Jim's Flea Market	100,000	Other, Misc. Retail	6	2	4
Crispelli's Bakery & Pizzeria	5,500	Restaurant (Family)	5	2	4
Cru' - A Wine Bar	2,300	Food or Beverage Specialty	12	2	4
Cucina	3,500	Restaurant (w/ Liquor)	1	5	10
DXL Destination XL	8,000	Apparel (Men's)	233	40	80
Ethan Allen	15,000	Home Furnishings	300	15	30
Five and Dime General Stores	4,000	Variety Store	10	10	15
Kilwin's Ice Cream	2,000	Food or Beverage Specialty	126	20	40
Music & Arts	3,000	Music, Video Sales	120	5	10
Naturalizer	2,500	Shoes	142	2	6
Nestle Toll House Cafe	1,800	Food or Beverage Specialty	108	10	20
Orvis	9,000	Sporting Goods	69	1	2
OshKosh B'Gosh	5,000	Apparel (Children's)	297	5	10
Outback Steakhouse	7,300	Restaurant (w/ Liquor)	733	10	20
P.F. Chang's China Bistro	7,000	Restaurant (w/ Liquor)	305	3	6
Peace Frogs	800	Apparel (Family)	7	5	10
Salt & Straw	1,500	Food or Beverage Specialty	20	2	4
Schokolad Chocolate Factory	1,600	Food or Beverage Specialty	16	5	10
Scrubs & Beyond	3,500	Apparel (Uniforms)	150	2	4
See's Candies	1,600	Food or Beverage Specialty	200	10	20
Spencer's	2,100	Gift Specialties	650	15	30
Stage Stores	30,000	Department Store	793	60	120
Travis Matthew	5,000	Apparel (Men's)	12	1	2

Regional - National Restaurants and Retailers Considering New Michigan Locations

Note: Businesses not cross referenced for existing Brighton locations

Restaurant - Retailer Name	Max. Sq. Ft.	Retail Categories	Exist. Stores	Next 12 Months	Next 24 Months
Trina Turk	2,200	Apparel (Women's)	14	1	2
Tropical Smoothie Cafe	1,800	Food or Beverage Specialty	780	18	36
Truist	3,500	Banking	1900	2	4
Truluck's	6,500	Restaurant (w/ Liquor)	12	1	2
Tucanos Brazilian Grill	8,000	Restaurant (Family)	8	4	8
Tuesday Morning	15,000	Discount Department Store	736	50	100
Urban Bricks Pizza Co.	3,000	Food or Beverage Specialty	14	2	4
Urban Cookhouse	3,000	Restaurant (Family)	11		
Urban Outfitters	15,000	Apparel (Activewear, Specialty)	251	60	120
Wayback Burgers	2,000	Restaurant (Family)	148	40	80
We're Rolling Pretzel Company	1,000	Food or Beverage Specialty	11	5	10
Wetzel's Pretzels	1,200	Food or Beverage Specialty	305	1	2
Which Wich	1,800	Food or Beverage Specialty	500		
Wild Bird Center	1,800	Pets, Pet Care, Supplies	35	10	20
Wilson's Leather	5,000	Apparel (Family)	131	1	2
Windsor Fashions	5,000	Apparel (Women's)	70	5	10
Wings Over	3,000	Restaurant (Family)	40	5	10
Work 'N Gear	4,000	Apparel (Uniforms)	41	1	2
World of Beer	3,000	Restaurant (w/ Liquor)	58	10	20
World Wrapps	1,400	Restaurant (Family)	2	1	2
Wow Cafe & Wingery	3,200	Restaurant (w/ Liquor)	60	5	10
Wrangler Stores	2,500	Apparel Men's Women's	2	1	2
Yia Yia Mary's	9,000	Restaurant (w/ Liquor)	2	1	2
Yo-Good	3,000	Food or Beverage Specialty	16	2	4
Yogen Fruz	1,500	Food or Beverage Specialty	1400	50	100
Yonutz	2,500	Fast Food	1	100	200
Z Pizza Tap Room	1,500	Restaurant (Family)	46	10	20