

Downtown Farmington Retail Market Analysis

Farmington, Michigan



Prepared for:
Farmington Downtown Development Authority

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INTRODUCTION



Figure 1: Aerial photo of downtown Farmington and surrounding area.

Executive Summary

This study finds that downtown Farmington in Metro-Detroit can presently support an additional 111,500 square feet (sf) of retail and restaurant development, generating over \$36.0 million in new sales. By 2019, a steadily growing residential base and notable increases in household income will increase the trade area's retail demand to support 125,900 sf of new development, potentially capturing \$44.7 million in consumer expenditure. The demand could partially be absorbed by existing businesses and/or with the opening of 29 to 40 new restaurants and stores.

Additional development in downtown Farmington can provide needed goods and services for the existing surrounding consumer base of nearby residents and employees. At present, it is likely that a significant portion of retail expenditure is leaking outside of Farmington to malls, shopping centers and other nearby downtowns. Given a wider selection of retail destinations downtown, it is plausible that a larger proportion of residents in the surrounding neighborhoods will choose to shop retailers in the study site over driving a considerable distance to other shopping areas. Furthermore, a critical mass of retail and restaurant destinations could have broad appeal, which has the potential to attract patrons from the greater Metro-Detroit region. The leading categories of supportable retail growth are restaurants, general merchandise stores, apparel and grocery stores.

Given Farmington's diverse demographics and shopping preferences, GPG finds that the downtown should focus on moderate to moderate-upscale retailers and restaurants offering popular brands or specialty goods and services with perceived value. While many households living within the downtown's trade areas will on occasion purchase luxury brands, such retailers and restaurants should not be the primary focus of the Farmington's tenant mix.

A desirable community well located near regional interstates and local highways, downtown Farmington is in a position to expand its current retail presence. This favorable location not only

affords Farmington's residents exceptional access to downtown Detroit and other surrounding suburbs, but also offers increased visibility for current and future retailers located within the downtown district. Combined with an in-demand housing stock and highly regarded schools, Farmington survived the recession with little population loss and a vacancy rate half that of the state. With the economy now in an upward trend, population and household incomes are rising, increasing the retail demand and creating favorable conditions for further commercial development.

Existing conditions in the downtown reflect a district caught between historic charm and suburban convenience, which has limited the success of existing retailers. Recent investment into streetscape and pedestrian infrastructure have improved the appeal of downtown and positions several sites along the primary shopping streets of Grand River Avenue and Farmington Road for infill or redevelopment. A charismatic supply of historic buildings, a statewide-renewed interest in placemaking, shifting consumer preference for local shopping in walkable downtowns and an improving economy offer Farmington the potential to expand the scale of supportable retail to include a broad range of retailers.

Table 1: 2014 & 2019 Supportable Retail

Retail Category	Est. 2014 Supportable SF	Est. 2019 Supportable SF	Number of Stores
Retail			
Apparel Stores	8,800	9,800	3 - 4
Book & Music Stores	1,300	1,500	1
Craft Beer, Spirits & Fine Wine Stores	1,800	2,200	1 - 2
Electronics & Appliance Stores	4,200	4,600	2 - 3
Furniture Stores	2,100	2,200	1
General Merchandise Stores	27,400	32,300	1 - 3
Grocery Stores	6,100	7,900	1
Hardware	5,600	6,200	1
Home Furnishings Stores	1,400	1,600	1
Jewelry Stores	1,300	1,400	1 - 2
Lawn & Garden Supply Stores	900	1,000	1
Miscellaneous Store Retailers	4,400	4,500	2 - 3
Office Supplies & Gift Stores	2,500	2,600	1 - 2
Pharmacy	3,700	4,300	1
Shoe Stores	1,000	1,100	1
Sporting Goods & Hobby Stores	800	1,200	1
Retail Totals	73,300	84,400	20 - 28
Restaurants			
Bars, Breweries & Pubs	3,100	3,400	1
Full-Service Restaurants	14,700	16,100	3 - 4
Limited-Service Restaurants	17,300	18,800	4 - 5
Special Food Services	3,100	3,200	1 - 2
Restaurant Totals	38,200	41,500	9 - 12
Retail & Restaurant Totals	111,500	125,900	29 - 40

This study further finds that downtown Farmington has a primary trade area population of 61,400 persons, increasing to 63,000 persons by 2019. The projected annual growth rate is 0.52 percent, outpacing both the regional and state levels. Median household income in the primary trade area is \$59,700, markedly higher than the region and state figures; 40.1 percent of households earn more than \$75,000 annually. Housing favors owner-occupied units, which comprise 55.6 percent of all occupied households, although, renter-occupied households have steadily grown since 2010 and now represent 38.5 percent of all occupied households; the vacancy rate is 5.9 percent. The primary trade area has a labor base of 30,400 employees.

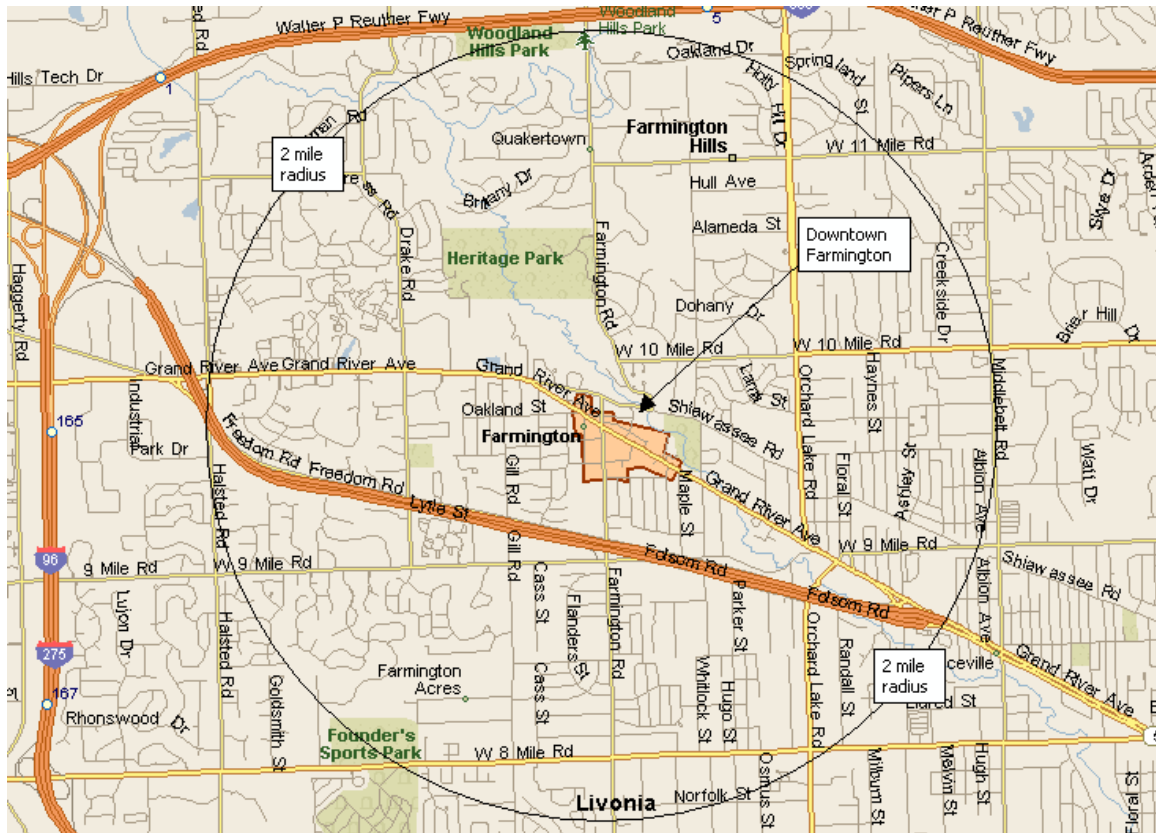


Figure 2: Downtown Farmington is well-located, just over two miles from Interstate-696 and Interstate-275.

Background

Gibbs Planning Group, Inc. (GPG) has been retained by the Farmington Downtown Development Authority to conduct a retail feasibility analysis for downtown Farmington in Metropolitan Detroit. The study area is located along Grand River Avenue and Farmington Road near the northern border of Farmington and surrounding Farmington Hills.

Farmington's historic downtown core dates to the 1870's, and after several decades of change has seen concentrated investment in recent years into streetscape, façade improvements and marketing. As the commercial center of one of Detroit's affluent suburbs, the health and vitality of restaurants and retail are viewed as one of the many amenities that draw residents to the area. Having endured the recession with a housing vacancy rate half that of the state, downtown is well positioned to expand its current retail presence. The consumer base is diverse and family-oriented, with incomes above regional and state averages, creating the potential for strong and sustainable retail.

GPG addressed the following issues in this study:

- What is the existing and planned retail market in the study and trade area?
- What is the primary trade area downtown Farmington?
- What are the population, demographic and lifestyle characteristics in the primary trade area, currently and projected for 2019?
- What is the current and projected growth for retail expenditures in the primary trade area, now and for the next five years?
- How much additional retail square footage is supportable in the downtown Farmington study area and what retail uses should be encouraged? What sales volumes can development achieve in or near the study area?

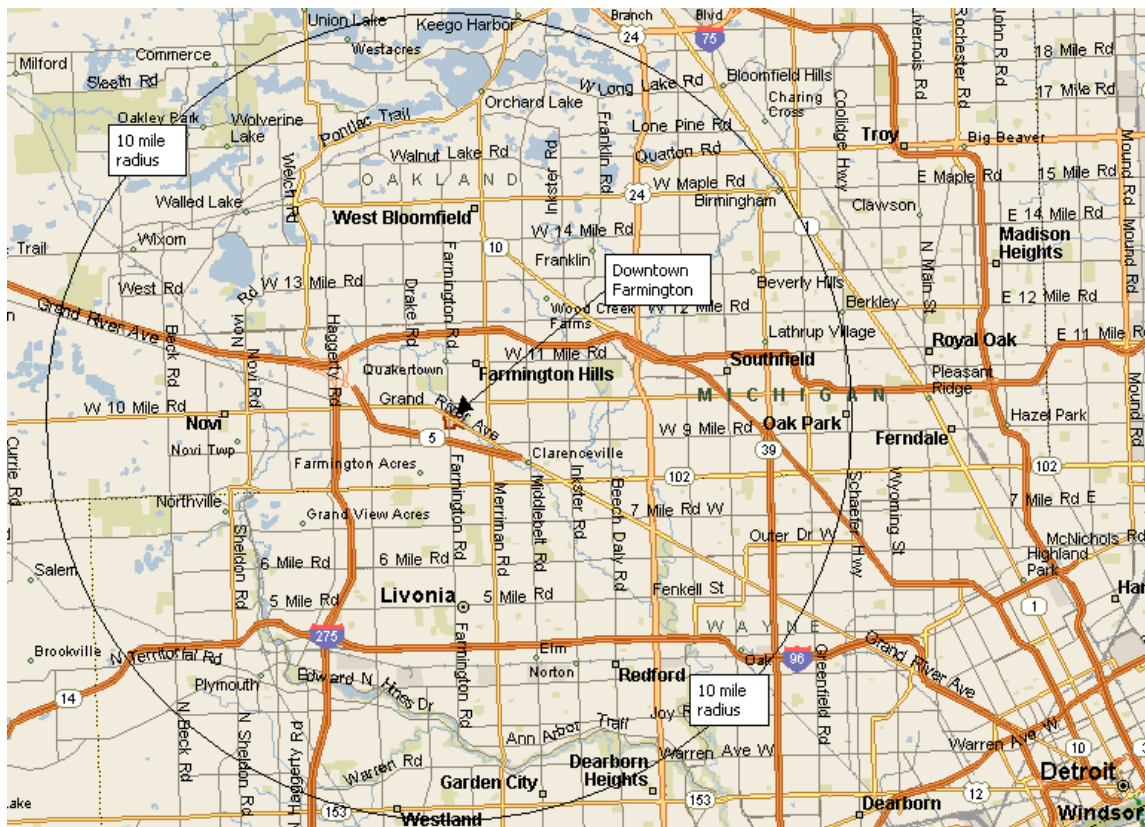


Figure 3: Downtown Farmington is within 10 miles of many of the Metro-Detroit freeways.

Methodology

To address the above issues, GPG defined a trade area that would serve the retail in the study area based on geographic and topographic considerations, traffic access/flow in the area, relative retail strengths and weaknesses of the competition, concentrations of daytime employment and the retail gravitation in the market, as well as our experience defining trade areas for similar markets. Population, consumer expenditure and demographic characteristics of trade area residents were collected by census tracts from the U.S. Bureau of the Census, U.S. Bureau of Labor Statistics and Esri (Environmental Systems Research Institute). Updates were made when necessary based on information gathered from local planning sources.

Finally, based on the projected consumer expenditure capture (demand) in the primary trade area of the gross consumer expenditure by retail category, less the current existing retail sales (supply) by retail category, GPG projects the potential net consumer expenditure (gap) available to support existing and new development. The projected net consumer expenditure capture is based on household expenditure and demographic characteristics of the primary trade area, existing and planned retail competition, traffic and retail gravitational patterns and GPG's qualitative assessment of the downtown Farmington study area. Net potential captured consumer expenditure (gap) is equated to potential retail development square footage, with the help of retail sales per square foot data provided by Dollars and Cents of Shopping Centers (Urban Land Institute and International Council of Shopping Centers), qualitatively adjusted to fit the urbanism and demographics of the study area.



Figure 4: Downtown Farmington hosts a number of popular events such as Art on the Grand and the Harvest Moon Festival. (Image Source: (right) Farmington DDA).

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

- Other major community retail centers may be planned or proposed, but only the existing retail is considered for this study. The quality of the existing retail trade in the study area is projected to remain constant. Gains in future average retail sales per sf reflect higher sales per sf in newly developed retail and selected increases in sales per sf by individual retail categories.
- No major regional retail centers will be developed within the trade area of this analysis through 2019 for the purposes of this study.
- The subject site is properly zoned to support infill and redevelopment projects with current and innovative standards, and the existing infrastructure (water, sewer, arterial roadways, etc.) can support additional commercial development.
- Annual population growth for the primary trade area is estimated to be 0.52 percent throughout the five-year period of this study.
- Employment distribution is projected to remain constant, without a spike or decline in employment by NAICS categories.
- The projected lease and vacancy rate model is based on our proprietary econometric model of the relationship between changes in employment and changes in vacancy and lease rates. Data was gathered from the U.S. Census Bureau, Esri, CBRE and local brokerage services.

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- The region's economy will continue at normal or above normal ranges of employment, inflation, retail demand and growth.
 - Any new construction in the study area 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 the New Urbanism, International Council of Shopping Centers and The Urban Land Institute.
 - Parking for new development projects or businesses will meet or exceed the industry standards. GPG has noted that the existing parking is apparently adequate for present amounts of commercial, but that the current management plan may need to be reviewed if existing vacancies become occupied or new higher sales businesses deploy in the study area.
 - Visibility of any new retail is also assumed very good, with signage as required to assure easy visibility of the retailers.
 - Infill or redevelopment projects in the study area will open with sustainable amounts of retail and anchor tenants, at planned intervals and per industry standards.

Trade Area



Figure 5: Streetscape elements such as planted parkways and brick pavers have improved the pedestrian infrastructure and broadened the appeal of downtown.

Based on GPG's site evaluation, the existing retail hubs, population clusters, highway access, and the retail gravitation in the market, as well as our experience defining trade areas for similar communities throughout the United States, it was determined that consumers in the primary trade area generate demand to support a variety of retailers. This potential will continue to increase over the next five years, sustained by an annual population growth rate of 0.52 percent and household income growth of 3.85 percent.

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

GPG defined a primary trade area by topography, vehicular access, strength of retail competition and residential growth patterns instead of standardized “drive-times.” Consumers inside the primary trade area will account for up to 70 to 80 percent of the total sales captured by retailers in downtown Farmington. Due to the strong retail gravitational pull of suburban malls and other downtown commercial districts, GPG finds that the primary trade area accounts for Farmington, the majority of Farmington Hills and a northern portion of Livonia, where retail development is limited and opportunities to provide desirable retailers in a walkable downtown are ample.

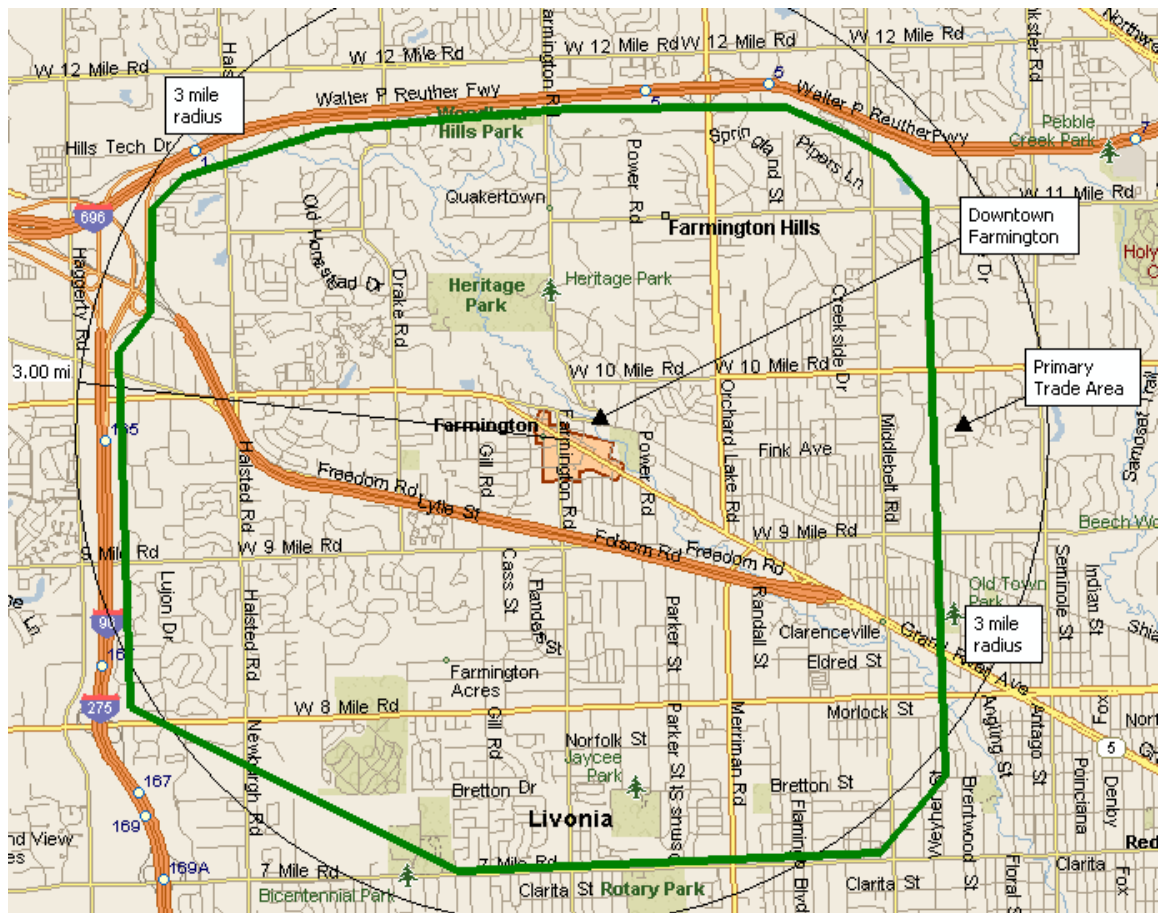


Figure 6: The boundaries of the downtown Farmington primary trade area are shown in green, and the existing retail village is highlighted in orange. Consumers in the primary trade area account for 70 to 80 percent of the business generated in the study area.

The following borders approximately delineate the primary trade area:

- North - Interstate-696
- South - Seven Mile Road
- East - Middlebelt Road
- West - Interstate-275

Furthermore, the total or community trade (Figure 7) area extends in all directions to include residents and workers who, because of convenient access, may now or in the future generate expenditure for downtown Farmington retailers. The boundaries of the total trade area extend north to include more of Farmington Hills, east to Telegraph Road, south to Interstate-96, and west to the neighborhoods beyond Interstate-275 and well-served by Grand River Avenue. Residents who live in the total, but not within the primary, trade area will shop the downtown retailers frequently, but the area will not be their primary shopping destination. Consumer expenditure by these residents will account for 10 to 20 percent of retail sales.

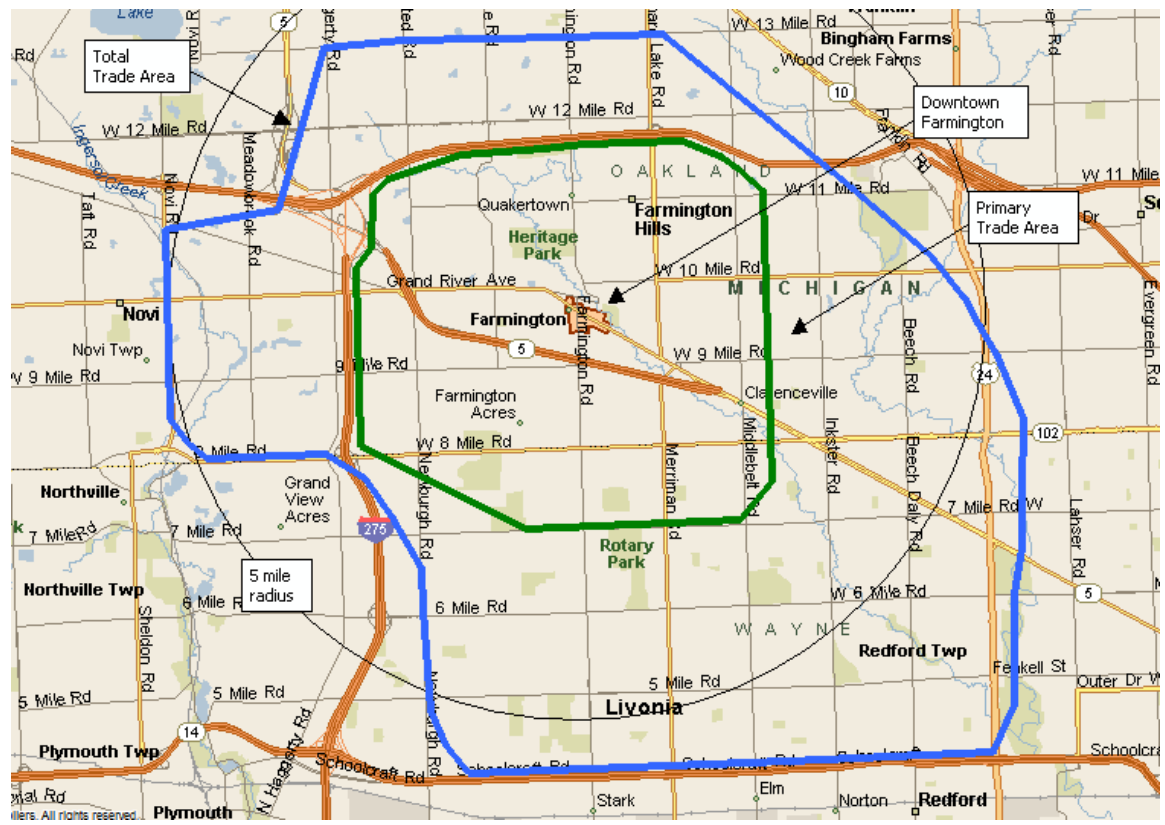


Figure 7: The total trade area (outlined in blue) identifies those residents who will shop in downtown Farmington frequently, but due to competing retail locations, it will not be their primary shopping destination.

Demographic Characteristics

Using data from Esri (Environmental Systems Research Institute) and the U.S. Census Bureau, GPG obtained the most recent population and demographic characteristics (2014), and those projected for 2019 for the defined trade areas, as well as national and statewide statistics.

The primary trade area has an estimated 2014 population of 61,400 persons, which will grow at an annual rate of 0.52 percent to 63,000 by 2019. This annual growth rate is higher than both the metropolitan and state levels of 0.02 and 0.10 percent respectively. The number of households in the primary trade area is 27,200, holding 2.24 persons per household, and is projected to increase to 28,000 by 2019, a 3.2 percent total increase over the five years. Median household income of \$59,700 is higher than regional and state figures, and is expected to increase to \$72,100 in 2019 at an annual rate of 3.85 percent. Average income in the trade area is \$84,400, while 40.1 percent of households earn over \$75,000 per year - markedly higher than both regional and state statistics.

In the total trade area there are 195,700 residents increasing by 0.40 percent to 196,600 by 2019. This growth rate is less than the primary trade area, but still similar to regional and state levels. The number of households is 81,700 increasing to 82,500 by 2019. Median household income in the area is \$59,200 and the average household income is \$80,100, both of which are less than the primary trade area; however, they are higher than regional and state levels, demonstrating the strength of the market's potential. Educational attainment shows similar trends as other characteristics relative to the primary trade area and regional and state figures, with 39.5 percent of residents over the age of 25 having earned a bachelor's degree or higher.

Table 2: Demographic Comparisons

Characteristics	Primary Trade Area	Total Trade Area	Metro Detroit CBSA	Michigan
2014 Population	61,400	195,700	4,255,300	9,853,700
2019 Population	63,000	196,600	4,260,300	9,903,000
2014-2019 Projected Annual Growth Rate	0.52%	0.08%	0.02%	0.10%
Persons Per Household 2019	2.24	2.37	2.51	2.47
Median Age	42.0	42.4	40.1	39.7
2014 Median Household Income	\$59,700	\$59,200	\$50,700	\$47,600
2014 Average Household Income	\$84,400	\$80,100	\$70,200	\$64,300
2019 Median Household Income	\$72,100	\$71,100	\$58,700	\$55,000
2019 Average Household Income	\$95,900	\$90,400	\$79,400	\$72,300
% Households w. incomes \$75,000+	40.1%	39.6%	32.6%	28.6%
% Bachelor's Degree or higher	46.9%	39.5%	27.9%	25.7 %

Table 2: This side-by-side table compares and contrasts primary trade area and total trade area demographic statistics with those of the Metropolitan-Detroit Core Based Statistical Area and Michigan.

The primary trade area demonstrates a strong housing market with a growing preference for renters. Approximately 94.1 percent of homes are occupied and the median home value is estimated to be \$192,600. Of the occupied households, 55.6 percent are owner-occupied, a number that has increased 0.3 percent since 2010 and is expected to remain constant until 2019. Renter-occupied households have increased steadily from 36.3 percent in 2010 to 38.5 percent in 2013; this is expected to continue to 2019 when 39.6 percent of households will be renter-occupied. An increase in the number of renter-occupied households and a stabilization of owner-occupied households also correlates to a decrease in the vacancy rate from 5.9 percent in 2014 to 4.8 percent in 2019. The median home value is expected to increase steadily to \$225,800 by 2019; a 17.1 percent total increase over the five-year period.

Tapestry Lifestyles

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

Table 3: Tapestry Lifestyles

Lifestyle	Trade Area Statistics	Short Description
 <p>Savvy Suburbanites</p>	<p>Population 12,100</p> <p>Median HH Income \$104,000</p> <p>15.9% Primary Trade Area Market Share</p> <p>3.0% National Market Share</p>	<p><i>Savvy Suburbanites</i> neighborhoods are full of wealthy, educated people. Many of them are empty nesters or have adult children living at home. 48.1 percent of this group consists of college graduates while over 75 percent have some college education. They have a low unemployment rate and stay up to date with the latest technology.</p> <p>Members of this lifestyle use technology as much as they can, whether for banking or shopping. Many also like to be informed shoppers and often do research before making purchases. They are willing to spend a premium to have healthy food and good wine. <i>Savvy Suburbanites</i> employ others to take care of housekeeping, though many maintain the lawn themselves. They are also active investors and try their best to remain physically fit.</p>
 <p>Rustbelt Traditions</p>	<p>Population 7,800</p> <p>Median HH Income \$49,000</p> <p>12.3% Primary Trade Area Market Share</p> <p>2.2% National Market Share</p>	<p>Members of the <i>Rustbelt Traditions</i> segment are determined, white-collar workers with a modest income - around \$49,000 on average. Many do skilled work in manufacturing, health care, and retail trade. Their neighborhoods are situated in metropolitan areas built in the 1950s, causing many households to have two or more cars. About half are married couples without children. The other half of the households is mostly single.</p> <p><i>Rustbelt Traditions</i> citizens are family-oriented and enjoy spending time at home. They stick to a budget and prefer to buy American-made goods. Households tend to have at least four televisions often tuned to AMC, ESPN, and Cartoon Network. Many spend a lot of time gaming online or frequenting family restaurants such as Applebee's or Outback Steakhouse.</p>
 <p>Enterprising Professionals</p>	<p>Population 6,600</p> <p>Median HH Income \$77,000</p> <p>10.1% Primary Trade Area Market Share</p> <p>1.4% National Market Share</p>	<p>Residents of <i>Enterprising Professionals</i> neighborhoods are well educated and are often involved in math and science-related industries. The market is extremely fast paced and fast growing, with many households moving frequently. Over 20 percent of the population of <i>Enterprising Professionals</i> is Asian, and many of them supplement their incomes with high-risk investments. This segment is younger and over half of all residents have a bachelor's degree.</p> <p><i>Enterprising Professionals</i> are young and technologically advanced. Over 50 percent have smart phones and many work long hours in front of a computer. They often buy the latest gadgets in hopes of impressing their friends and shop in the most convenient way possible - usually over the internet. <i>Enterprising Professionals</i> make many trips to the dry cleaners and prefer digital books when reading.</p>



Lifestyle	Trade Area Statistics	Short Description
 <p data-bbox="339 667 488 695">Golden Years</p>	<p data-bbox="594 348 711 407">Population 5,000</p> <p data-bbox="594 443 802 501">Median HH Income \$61,000</p> <p data-bbox="594 537 808 596">9.7% Primary Trade Area Market Share</p> <p data-bbox="594 632 743 690">1.3% National Market Share</p>	<p data-bbox="842 348 1382 590">The <i>Golden Years</i> segment consists of an older market - the median age is 51 years old. This small but growing market is full of financially secure seniors that are well educated and have children that are no longer living at home. The population still has an active labor force, but many consumers invest their time in leisurely activities. Though they are not the most up-to-date with technology, <i>Golden Years</i> residents are still well connected and use the internet frequently.</p> <p data-bbox="842 625 1393 785">This market enjoys leisure activities like dining out, travelling, and going to museums, sporting events and concerts. They are supportive of the arts and often give generous donations to charitable organizations. Residents also tend to use professional services to maintain their homes while still remaining active and living healthily.</p>
 <p data-bbox="342 1171 505 1230">Comfortable Empty Nesters</p>	<p data-bbox="594 852 711 911">Population 5,800</p> <p data-bbox="594 947 802 1005">Median HH Income \$68,000</p> <p data-bbox="594 1041 808 1157">8.7% Primary Trade Area Market Share (Households)</p> <p data-bbox="594 1192 743 1251">2.5% National Market Share</p>	<p data-bbox="842 852 1406 1094"><i>Comfortable Empty Nesters</i> are an older but growing segment of Baby Boomers that still live in the same neighborhood in which they grew up. The market has a low unemployment rate of seven percent and an above average income of \$68,000. Many residents are homeowners that place a great deal of importance in maintaining their homes. Most households receive income from wages and salaries, though more than a third is supplemented by investments and retirement.</p> <p data-bbox="842 1129 1385 1289"><i>Comfortable Empty Nesters</i> prefer to eat at home rather than dining out and most remain physically active. Residents like to watch television but are not tech-savvy and only own older home computers. This market is living comfortably off diverse investment portfolios and years of savings.</p>

Table 3: The top five Tapestry Lifestyle groups profiled above portray a cluster of young singles and families as well as neighborhoods of affluence.

The trade area's most common tapestry lifestyle group is "Savvy Suburbanites," representing 15.9 percent of all households. With a median age of 44.1 years, most households are comprised of married couples with no children or older children at home. Savvy Suburbanites neighborhoods are not very diverse; 87.1 percent of residents are white. Living in established neighborhoods outside the urban core, most homes were built between 1970 and 1990 and the median home value of \$311,000 is significantly higher than the U.S. median. Home-ownership is dominant in this category as 91 percent of homes are owner-occupied and 71 percent have an active mortgage; the vacancy rate is low at 4.5 percent.

Well-educated and well-read, 48.1 percent of residents are college graduates and 76.1 percent have attended college. This translates to a low unemployment rate (5.8 percent), a high labor force participation rate (68.5 percent) and proportionately more two-worker households (65.4 percent). Management, health care and education are common employment sectors among the college-educated residents, while others work in office or administrative support roles or sales.

Median income is more than double the U.S. figure at \$104,000, and significant net worth (\$502,000) is derived from investments, retirement savings and real estate.

Well-connected, technology and the internet are vital to making informed purchases and when savings are significant, such as using online shopping. Aside from retirement investments and contributions to their children’s education, household budgets favor entertainment and recreation over other retail purchases. Maintaining a physically active lifestyle, residents actively pursue a number of leisure sports such as skiing and golf, and invest in appropriate gear and exercise equipment. Gardening and home-remodeling projects are a common preoccupation with multiple trips to Home Depot or Lowe’s throughout the year. When not dining out, Savvy Suburbanites love to cook and have a strong preference for natural and organic products.

Tapestry Lifestyles Segmentation

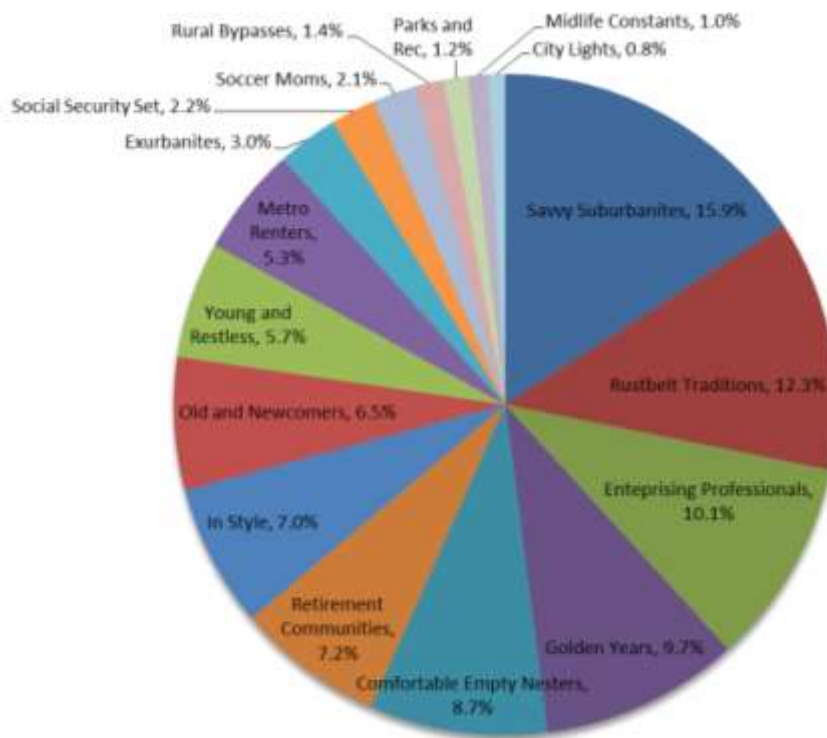


Figure 8: The relative proportions of the top Tapestry Lifestyle segments found in the primary trade area.

Of the other most common tapestry segmentations in the primary trade area, *Enterprising Professionals*, *Golden Years* and *Comfortable Empty Nesters* exhibit similar lifestyle characteristics as *Savvy Suburbanites*. While these segments vary in age from young professionals to retirees, each demonstrates a desire for continued investment into their homes and active lifestyles. Home improvement projects and well-kept lawns show signs of a weekend’s worth of do-it-yourself activities, and owning exercise equipment or taking fitness classes are common. Similar to Savvy Suburbanites, these segments budget more of their income for entertainment and recreation than apparel, jewelry and other personal items. Overall, there is a preference for American-made goods and local shopping. Downtown Farmington could improve the capture of retail expenditure from these households with further restaurant and entertainment development as well as locally sourced or produced retail goods.



Figure 9: Historic mixed-use buildings offer the opportunity for first floor retail and services with offices or apartments above, increasing the number of daytime workers and residents downtown.

Employment Base

The employment picture found in the primary trade area reflects a concentrated services and retail sector foundation, with additional elevated levels in manufacturing, finance, insurance and real estate (FIRE) and construction.

As shown in Table 4, the service sector accounts for the majority of employment (45.2 percent) in the primary trade area; however, this is a lower proportion than found in the region and state. This smaller proportion leads to overall higher representation of employment in most categories with the exception of utility and government. This balanced mix of employment contains many sectors that are typically responsible for a significant source of daytime worker expenditure, suggesting that further retail development may lure more daytime consumers to downtown to support new and existing retailers.

Table 4: Employment Comparison by Sector

Sector	Primary Trade Area	Total Trade Area	Metro Detroit CBSA	Michigan
Agriculture and Mining	1.2%	9.0%	1.0%	1.8%
Construction	5.8%	4.8%	3.7%	4.4%
Manufacturing	13.0%	10.1%	12.7%	12.7%
Transportation	2.1%	1.9%	2.4%	2.7%
Communication	0.7%	1.1%	0.6%	0.6%
Utility	0.3%	0.8%	0.4%	0.5%
Wholesale Trade	7.0%	6.2%	3.6%	3.7%
Retail Trade	16.3%	15.3%	13.1%	15.8%
Finance, Insurance & Real Estate	6.6%	8.1%	4.3%	4.5%
Services	45.2%	48.9%	54.5%	47.8%
Government	1.7%	2.4%	3.9%	5.4%

Table 4: Manufacturing and service comprise the bulk of primary trade area employment.

Within the service sector, other services is the leading subcategory comprising 29.2 percent of total employment, followed by health services (6.5 percent) and educational institutions and libraries (5.5 percent). The latter two subcategories can be explained by a concentration of health care workers employed by Botsford Hospital and St. Mary Mercy Hospital, as well as a number of education-related employees working for the local school districts and Oakland Community College's Orchard Ridge campus. Health services and education employees are likely candidates to leave the workplace for lunch and support downtown restaurants.

Table 5: Drive Time Employment by Industry Sector

Employment Sector	Primary Trade Area	10-minute Drive Time	Total Trade Area
Agriculture & Mining	360	650	1,000
Construction	1,770	3,140	5,070
Manufacturing	3,970	7,210	10,610
Transportation	650	1,390	2,000
Communication	220	680	1,160
Utility	90	160	200
Wholesale Trade	2,140	4,500	6,530
Retail Trade	4,950	12,940	16,180
Home Improvement	310	440	660
General Merchandise Stores	950	2,230	1,950
Food Stores	450	1,270	1,970
Auto Dealers, Gas Stations, Auto Aftermarket	740	1,480	2,260
Apparel & Accessory Stores	110	1,020	550
Furniture & Home Furnishings	170	640	700
Eating & Drinking Places	1,510	3,930	5,290
Miscellaneous Retail	710	1,930	2,800
Finance, Insurance & Real Estate	2,020	5,390	8,530
Banks, Savings, & Lending Institutions	310	1,290	1,970
Securities Brokers	100	370	470
Insurance Carriers & Agents	550	1,640	2,930
Real Estate, Holding, Other Investment	1,060	2,090	3,160
Services	13,780	32,430	51,510
Hotels & Lodging	90	990	1,160
Automotive Services	390	780	1,320
Motion Pictures & Amusements	440	1,060	2,100
Health Services	1,970	5,740	9,590
Legal Services	290	590	900
Education Institutions & Libraries	1,690	3,410	5,270
Other Services	8,910	19,860	31,170
Government	520	1,320	2,570
Unclassified Employment	10	20	70
Total Employment	30,480	69,830	105,430

Table 5: Advantageous regional access translates to 30,480 and 69,830 employees working within the primary trade area and a 10-minute drive time respectively.

Daytime employment plays a large role in supporting retail. The primary trade area is estimated to have nearly 30,500 employees; an estimated 23,800 of them are office employees who are known to expend 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 times is consistent with primary trade area percentages, with services, retail, manufacturing and FIRE being the leaders within ten minutes at 32,430, 12,940, 7,210 and 5,390 jobs respectively.

Consumer expenditure from daytime employment compliments that captured in the evenings and on weekends by households in the trade area. *“Office Worker Retail Spending in a Digital Age”*, published by the International Council of Shopping Centers in 2012, provides insight into the impact of office worker employment. Weekly office worker expenditure, adjusted for 2014 dollars, is estimated at \$181. Weekly non-office worker expenditure, in 2014 dollars, is estimated at 37 percent of office workers. Non-office workers are estimated to have slightly less disposable income, to have multiple work locations including at home and typically are on the road more during their workweek. Retail purchases (general merchandise, apparel, home furnishings, electronics, grocery and convenience items) make up the majority of the office worker dollars, at \$120 per week. Restaurant expenditures (full service, limited service and drinking places) account for the balance at \$61 per week. Annualized, each office worker expends \$9,456 before, during and after work.

Table 6: 10-Minute Drive Time Worker Expenditure

Category	Weekly Expenditure	Annual Expenditure	% Capture	Office Worker Expenditure	Non-Office Worker Expenditure	Total Expenditure
				28,730	41,100	
Prepared Food & Beverage						
Limited & Full Service Restaurants	\$44	\$2,332	75.0%	\$50,248,770	\$26,597,043	\$76,845,813
Drinking Places	\$17	\$884	25.0%	\$6,349,330	\$3,360,747	\$9,710,077
Retail Goods						
General Merchandise, Apparel, Home Furnishings, Electronics	\$70	\$3,640	20.0%	\$20,915,440	\$11,070,696	\$31,986,136
Grocery	\$30	\$1,560	15.0%	\$6,722,820	\$3,558,438	\$10,281,258
Convenience Items	\$20	\$1,040	33.0%	\$9,860,136	\$5,219,042	\$15,079,178
Total	\$181	\$9,456		\$94,096,496	\$49,805,966	\$143,902,462

Table 6: Over 69,830 employees within a 10-minute drive of the subject site annually contribute \$143.9 million to the local economy.

The annual impact of the 69,830 workers within ten minutes of downtown Farmington is \$143.9 million. This expenditure breaks down to include \$86.5 million in prepared food and beverage establishments, \$10.2 million in grocery purchases, \$31.9 million in retail sales, and \$15.0 million in convenience items. New or expanded restaurants deploying in downtown with appropriate levels of parking and excellent visibility could increase the share of drive time worker expenditure captured by retailers in the study site.

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

TRADE AREA CHARACTERISTICS



Figure 10: Well-located near regional expressways and highways, three main interchanges (circled in red) bring consumers to downtown Farmington. Signage and wayfinding along these routes could improve navigation to the study site.

Location

The primary trade area is constrained by retail competition located within close proximity to the several interstates and highways in the area. However, this also suggests that regional access is exceptional and downtown Farmington could plausibly begin to attract consumers from outside of the trade area. Retail locations conventionally developed with visibility and access from the surrounding highways is certainly the dominant and preferred format in this area. Nevertheless, the popularity of several nearby downtowns has demonstrated that there is pent-up demand for walkable shopping areas and Farmington's central location could provide a needed alternative to residents living within the trade area. The study area's proximity to regional transportation routes also translates to a number of employment clusters within the trade area represented by nearly 70,000 workers within a 10-minute drive time of downtown restaurants and retailers. Furthermore, due to the proximity to several freeways, a large percentage of workers in the Metro-Detroit region likely pass within two miles of the site on the homebound workday commute. A large percentage of retail sales occur on the way home from work and downtown Farmington could increase market share by attracting these homebound consumers.

Access

Regional linkage is exceptional in the trade area: downtown Farmington is just over two miles from Interstate-696 and Interstate-275, two of the most prominent expressways in the Metro-Detroit region. Additionally, M-5, which serves as a bypass for Grand River Avenue around the downtown, carries a number of motorists within a half mile of the site. In addition to local roads, Figure 10 identifies the three main interchanges that visitors are likely to use to arrive at the study site.

Table 7: Traffic Counts

Location	Traffic Count	Year
Interstate-275 & 8 Mile Road	197,000	2012
Interstate-696 & Orchard Lake Road	175,800	2007
Interstate-96 & Merriman Road	143,600	2009
Telegraph Road & 10 Mile Road	75,700	2011
Northwestern Highway & Middlebelt Road	41,000	2007
12 Mile Road & Farmington Road	33,500	2012
8 Mile Road & Farmington Road	24,900	2012
M-5 & Farmington Road	23,000	2009
Haggerty Road & 10 Mile	22,000	2012
Orchard Lake Road & Shiawasee Road	21,000	2012
Grand River Avenue & Shiawasee Road	20,300	2010
Middle Belt Road & Ten Mile Road	16,700	2012
Farmington Road & Oakland Avenue	13,900	2006
Grand River & Farmington Road	13,000	2012
9 Mile Road & Farmington Road	10,500	2012
10 Mile Road & Orchard Lake Road	9,400	2012
Halsted Road & Industrial Park Drive	9,300	2007
Inkster Road & Ten Mile Road	8,000	2011

Table 7: The traffic chart shows heavy traffic along the major interstates with notable levels of motorists on the local routes in the primary trade area. (Source: SEMCOG, ESRI)

High traffic volumes seen in Table 7 confirm the routes with the best regional access: Interstate-275 and Interstate-696. Most notable in Table 8 is the comparison of traffic along Grand River Avenue in downtown with other local routes in the area. There are 13,000 cars that pass through downtown on a daily basis; however, where Shiawassee Road meets Grand River a short distance to the west, the traffic count jumps by over 7,000 cars. This level of traffic rivals most other routes in the trade area and is comparable to many other downtown districts in the region. This level of visibility suggests that downtown can be competitive with other suitable locations within the trade area.

The provision of convenient parking is the next step in taking advantage of the daily traffic carried along Grand River Avenue. A parking study completed in 2008 identified the potential for a parking deficit should planned development and expected traffic growth occur. Furthermore, the DDA's Development District Master Plan identifies areas to expand on-street parking as well as potential locations for structured parking. While providing additional public parking, especially structured parking, comes at a considerable cost, both strategies may likely need to be deployed, if additional retail development occurs in downtown or higher-volume retailers choose to locate to existing vacancies. In today's busy world, the perception of a lack of parking is often reason enough for consumers to find alternative shopping destinations.

Other Shopping Areas

As part of GPG's evaluation, neighborhood, community and regional shopping centers near downtown Farmington were identified and studied to assess their retail appeal, strength of tenant mix, general maintenance and accessibility. In addition to aerial imaging, GPG used information from the International Council of Shopping Centers' Global Shopping Center Directory.

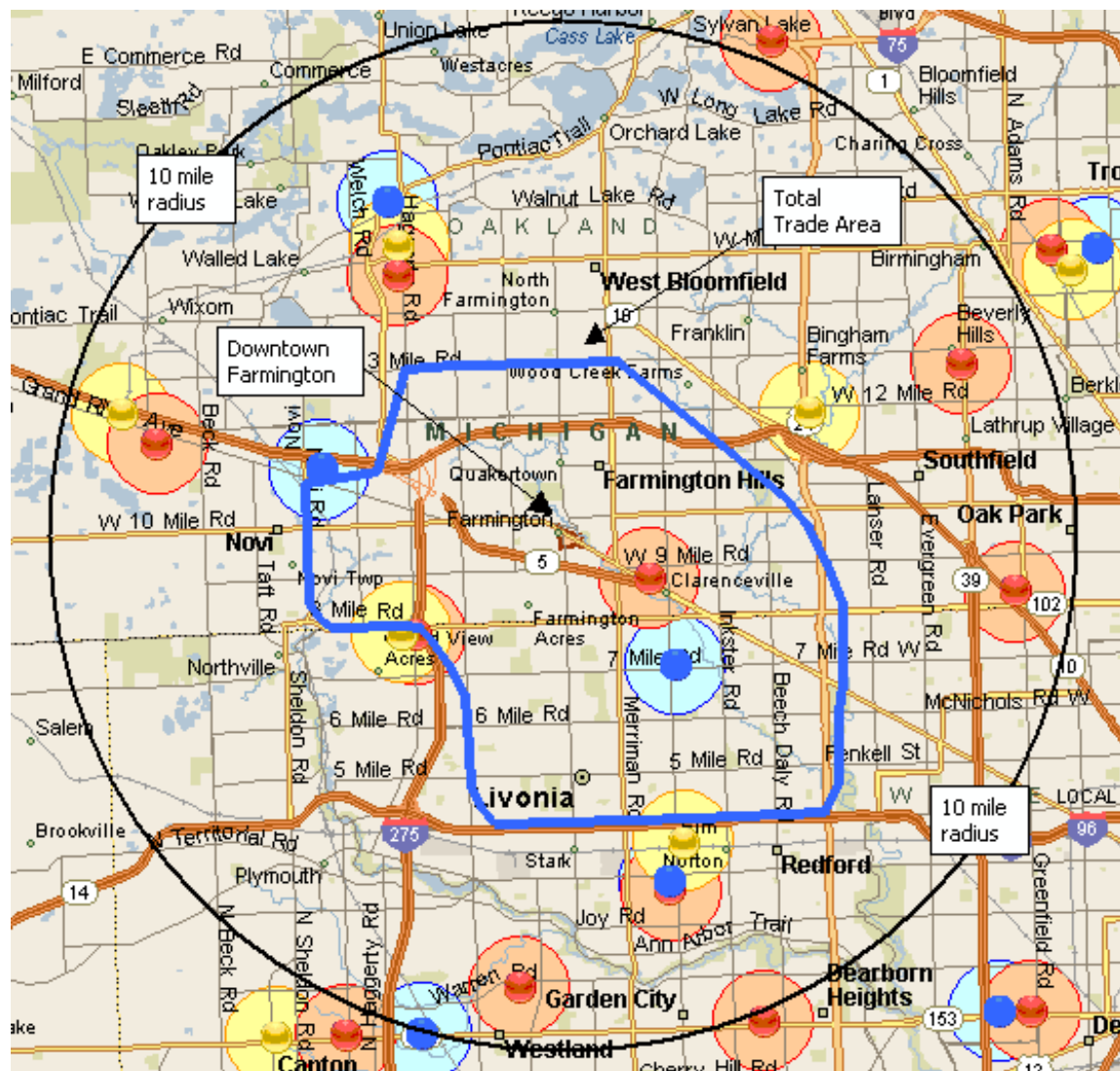


Figure 11: Meijer (yellow), Wal-Mart (blue) and Target (red) locations within 10-miles of downtown Farmington.

The strongest competition to downtown Farmington retailers and restaurants is the local supply of desirable malls located near major interstates with advantageous visibility and an ample supply of parking. Given the suburban location, car ownership is very high and many residents within the trade area likely pass by these malls on their daily commute to and from work. Furthermore, an abundance of the large-format retailers, Meijer, Target and Wal-Mart, in close proximity to the trade area demonstrates a preference for one-stop convenient shopping.

In addition to conventionally developed shopping malls and centers, there are a number of downtown districts in the Metro-Detroit region. To the east of Farmington, Ferndale, Royal Oak, and Birmingham offer unique collections of national and local retailers with restaurants, bars and nightlife that make these areas popular weekend destinations. To the west, Plymouth and Northville have smaller downtowns with appeal to families and professionals looking for a walkable destination set within the amenities of a suburban location. None of these downtowns are alike and Farmington will need to consider branding and retailer offerings as it looks to expand its local presence.

Table 8: Existing Regional Malls & Shopping Districts

Map Designation	Retail Center Name	Shopping Center Type	Size (sf)	Distance to Downtown
A	Laurel Park Place	Regional Mall	505,000	5.5 miles
B	Twelve Oaks Mall	Regional Mall	1.5 million	6.1 miles
C	Twelve Mile Crossing at Fountain Walk	Regional Mall	737,000	7.1 miles
D	Westland Center	Regional Mall	1.1 million	9.1 miles
E	Northland Center	Regional Mall	1.7 million	9.4 miles
F	Fairlane Town Center	Regional Mall	1.4 million	15.1 miles
G	Somerset Collection	Regional Mall	1.4 million	16.8 miles
H	Oakland Mall	Regional Mall	1.5 million	20.8 miles

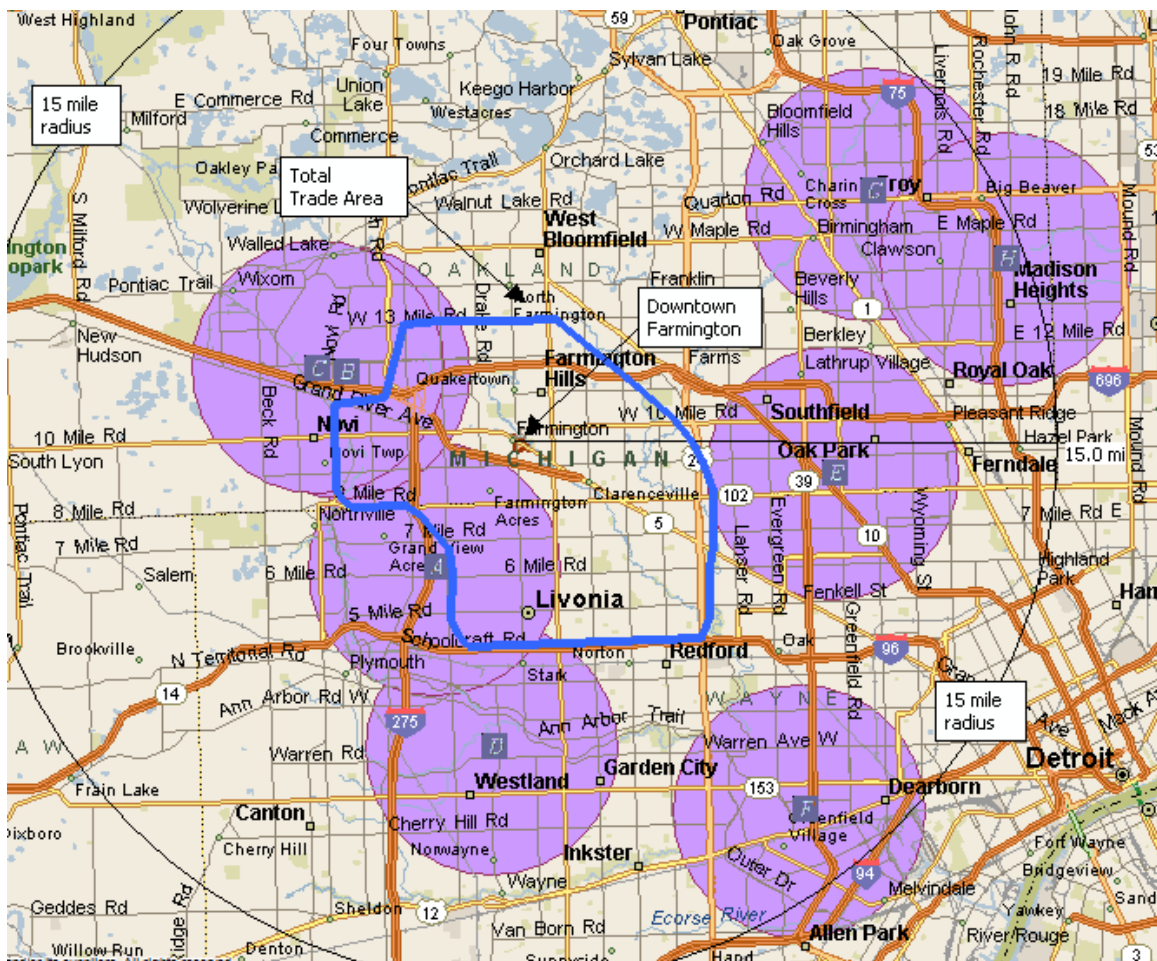


Figure 12: Regional malls and lifestyle centers within 15 miles of downtown Farmington.

Regional Malls



Figure 13: Laurel Park Place is the smallest mall in the region, but is the closest to downtown Farmington. (Image Source: (left) Detroit News (right) Laurel Park Place).

A. Laurel Park Place

Located roughly five miles southwest of downtown is Laurel Park Place, an upscale shopping mall in Livonia that is anchored by Carson's and Von Maur. The 505,000 sf mall was acquired by CBL & Associates Properties, Inc. in 2005 when its occupancy rate was over 85 percent. Since the mall's opening in 1989 it has undergone one expansion, which included the construction of Michigan's first Parisian (now Carson's). The mall later saw the conversion of the bankrupt Jacobson's into Von Maur. During the mall's acquisition by CBL, it boasted sales per sf of \$409.



Figure 14: Twelve Oaks Mall is one of the largest malls in southeastern Michigan. (Image Source: (left) W. J. O'Neil Company (right) Clark Construction Company).

B. Twelve Oaks Mall

Twelve Oaks Mall in Novi is located about six miles from the city center. At over 1.5 million sf, it is one of the largest malls in the area. Taubman Centers has managed the mall since its development in 1977 and has implemented numerous renovations. In 2002, the original United Artists movie theatre was demolished to make room for a food court and kiosks. Today, Twelve Oaks has over 180 stores and is anchored by JCPenney, Lord & Taylor, Macy's, Nordstrom and Sears.



Figure 15: Twelve Mile Crossing at Fountain Walk is adjacent to Twelve Oaks Mall, but has seen far less success than its indoor neighbor. (Image Source: Dwight Burdette).

C. Twelve Mile Crossing at Fountain Walk

Across the street from Twelve Oaks is Twelve Mile Crossing at Fountain Walk, an open-air lifestyle center. The 737,000 sf center is currently anchored by Dick's Sporting Goods, the Emagine Novi Movie Theatre and a Sears Outlet, but originally featured a Galyan's Trading Company and The Great Indoors when it opened in 2002.

The mall's original owner, PLC Novi West, filed for bankruptcy in 2004 and was bought out by HHT Devco LLC. PLC cited poor visibility as the reason for the shopping center's poor performance and less than 70 percent occupancy rate. The center was redeveloped in 2006 by Transwestern Investment Company and has since continued to expand.



Figure 16: Westland Center is one of the older malls in the trade area. (Image Source: Dwight Burdette).

D. Westland Center

Westland Center opened in 1965 in Westland, Michigan - about nine miles south of Farmington. The 1.1 million sf mall is managed by Spinoso Real Estate Group and is anchored by JCPenney, Kohl's, Macy's and Sears.

The mall was originally anchored by a Hudson's, a Kresge, and a Kroger supermarket. It wasn't until 1976 that the Kroger was demolished and replaced by JCPenney. In the 1980's, a MainStreet store joined the mall and was later converted into Kohl's. Sears joined the mall in 1997, while Hudson's was converted first into a Marshall Field's in 2001 and later into a Macy's in 2006.



Figure 17: Northland Center once hosted five anchor tenants. Today, Macy's and Target remain.

E. Northland Center

Northland Center (9.4 miles from the study site) opened in 1954 as the Detroit area's first regional shopping center; it was also the largest such center in the United States at the time of its completion. Originally an open-air center designed by Victor Gruen, it was planned as a collection of stores surrounding a J.L. Hudson department store; this original anchor tenant remains today, bearing the Macy's nameplate due to successive consolidations in the industry. Northland was enclosed in the 1970's, and at its peak supported five anchor tenants. Today, Macy's and Target anchor the 1.7 million sf center, which hosts 130 in-line retailers. Northland was purchased by Ashkenazy Acquisition Corporation in 2008, when the center's occupancy rate was 70 percent, with inline spaces filled mostly by smaller independent retailers.



Figure 18: Fairlane Town Center in Dearborn is a regional mall located south of the primary trade area. It features a 21-screen theater and a unique grouping of casual dining restaurants in addition to three anchor stores.

F. Fairlane Town Center

Approximately twelve miles from city center, Fairlane Town Center is a 1.4 million sf regional mall that anchors a corridor of major retail developments located along M-39, stretching from Dearborn into the city of Allen Park. This area is directly accessible from The Armory via M-39.

Developed by Taubman Centers and opened in 1976, Fairlane was built on a portion of land once owned by Henry Ford, whose mansion remains in sight directly to the west of the mall. Anchor tenants are JC Penney, Macy's and Sears, but Fairlane once hosted five anchors; a former Saks Off Fifth space was rebuilt into a unique "lifestyle section" with an outdoor promenade containing several casual dining restaurants, including BRAVO! Cucina Italiana and P.F. Chang's Bistro.

The regional center includes the largest H&M store in Michigan, and continues to host a variety of national fashion retailers inline. A 21-screen theater was built to replace the center's original multiplex in early 2000. Fairlane has a history of experimenting with unique features; the center originally included an elevated monorail connecting it to the 773-room Hyatt Regency hotel to its southwest. The monorail was decommissioned in the late-1980s to facilitate expansion of the mall's center court.



Figure 19: Somerset Collection is one of the most profitable luxury malls in the country. (Image Source: Somerset Collection).

G. Somerset Collection

The 1,440,000 sf Somerset Collection is one of the most profitable malls in the United States that is not owned by a real estate investment trust. The mall first opened in 1969 about 15 miles northeast of Farmington and was anchored by the already existing Saks Fifth Avenue and the newly constructed Bonwit Teller. After Bonwit Teller went bankrupt and was replaced by Neiman Marcus in 1992, the mall became very successful, which prompted its developer - the Forbes Company - to construct a 940,000 sf expansion.

The newer Somerset North is connected to the original Somerset South by a 700 ft. bridge - the Skywalk - that transports customers between the two buildings over Big Beaver Road. After the conversion of Somerset North's Marshall Field's into a Macy's, Somerset Collection became one of the only malls in the country to have a Macy's, a Nordstrom, a Neiman Marcus, and a Saks Fifth Avenue.



Figure 20: Built in 1965, Oakland Mall has been a popular shopping destination for many years: (Image Source: (left) Urban Retail Properties (right) Michigan.org).

H. Oakland Mall

Oakland Mall is located approximately 20 miles east of the site in Troy. It is owned by Urban Retail Properties, which bought it from Kogan Companies in 2007, and has over 1.5 million sf of leasable area. Built in 1965, it was originally anchored by Hudson's, Wrigley Supermarket and Kresge. It is now anchored by JCPenney, Macy's and Sears, and has over 120 stores.

Downtown Districts



Figure 21: Downtown Royal Oak (above left) has a mixture of independent and national retail, dining and entertainment. The Ferndale downtown district (above right) is an organic mix of galleries, specialty retail and nightspots with a trendy, authentic flavor.

Ferndale

Ferndale's downtown district is centered on Woodward Avenue and Nine Mile Road. Although the retail here is not composed of national tenants with significant sales per square foot numbers, the authentic book and antique stores, coffee shops and custom retail make it a destination for neighborhood, community and tourism retail. Downtown businesses include art galleries, a comic book store, retro-themed antique, clothing and candy stores, health foods, a record store and several independent bookstores. Dining includes many small, ethnic-themed restaurants and several full-service bar and grilles. Unique cocktail lounges are abundant in lieu of traditional bars.

Royal Oak

Situated northeast of the intersection of Interstate 696 and Woodward Avenue, downtown Royal Oak hosts a trendy mix of local, regional and national retailers. American Apparel and several eclectic boutiques have locations in the downtown district, centered on Main Street, 4th Street and Washington Avenue. Seven coffee houses operate in the area, with Starbucks competing against local merchants, many of whom offer live entertainment. Casual upscale bistros and wine bars coexist with a full range of quick service and casual dining restaurants, including bd's Mongolian Grill, Noodles & Co., and Qdoba Mexican Grill. A 10-screen first-run theater and 16-lane bowling alley opened in 2011, complementing a long-standing art theater on Main Street. An additional former theater building now plays host to off-Broadway productions and live music. The retail, dining and entertainment shares space with more than 10 independent bars, clubs and cocktail lounges.

Birmingham

Fourteen miles northeast of Farmington, downtown Birmingham has attracted a mix of upscale specialty and traditional retail and dining, centered at the intersection of Old Woodward Avenue and Maple Road. Retail names include Anthropologie, Ethan Allen Design Center and Jos. A. Bank Clothiers, among many other independent galleries, antique and jewelry stores. Dining options range from casual café and quick service restaurants to upscale bistro and full service establishments. The city enjoys expanded streetside dining during warmer months when business

owners may rent street parking to provide outdoor seating. Downtown Birmingham additionally provides 20 movie screens between two theaters, one of which was constructed in 1927, later restored, and expanded to eight screens in the 1990's.



Figure 22: The City of Birmingham offers a wide range of restaurants, entertainment and shopping in a historical urban setting.

Northville

Downtown Northville is located 7.5 miles southwest of Farmington's city center and offers a variety of unique shopping and dining experiences. The Town Square is the place to go for restaurants with outdoor patios, while the surrounding Main Street shopping district has over 75 restaurants and shops to explore. Northville prides itself on the numerous events it puts on throughout the year, such as Art in the Sun or Fire and Ice. The Downtown area is very walkable and has something for everyone.



Figure 23: Northville and Plymouth are west of I-275 and have downtowns popular amongst established professionals and families. (Image Source: (left) Northville DDA (right) Sam Plymale).

Plymouth

Situated 12 miles southwest of Farmington is downtown Plymouth, a vibrant town with over 100 shops and 24 restaurants. This downtown serves both the City of Plymouth and Plymouth Charter Township, which have a combined population of over 36,000. Events are held throughout the year at Plymouth's signature Kellogg Park, including the Music in the Air Summer Concert Series. Downtown Plymouth features dozens of shops, boutiques, wellness centers, salons and spas. The Penn Theatre is a community treasure used for movies, performances and concerts year round.

Community Centers

1. West River Centre

Located about two miles southeast of the subject site, West River Centre is a shopping center built in 1989 with a gross leasable area of 291,333 sf. The center has been managed by DLC Management Corporation and is anchored by Dunham's Sports, Office Max and Target. It also features the West River Movie Theatre, which is operated by Dipson Theatres.

2. Novi Town Center

Novi Town Center is situated about five miles west of the site. The shopping center is owned by Simon Property Group and is anchored by Hobby Lobby, TJ Maxx and Walmart. With a gross leasable area of 444,198 sf, it is the second largest community center in the area, and rivals Twelve Oaks Mall, which is on the other side of I-96.

3. Livonia Marketplace

Livonia Marketplace is a 325,000 sf shopping center located on the site of the former Livonia Mall, about four miles southeast of Farmington's center. The redeveloped marketplace opened in 2010 with Lormax Stern as its manager. It is now anchored by Kohl's, Petco, Sears and Walmart, with Sears being the only store remaining from Livonia Mall.

4. Haggerty Road

The Haggerty Road shopping centers are a series of big box stores situated on the corners of Haggerty and 8 Mile Road. The northern plaza, High Point Shopping Center, was built in 1997 and its gross leasable area of 130,893 sf is anchored by Best Buy, Dick's Sporting Goods and OfficeMax. South of that plaza is the Northridge Grove Shopping Center, which is anchored by a Meijer. Across the street is a larger shopping center containing both a Costco and a Target.



Figure 24: The Orchard Lake Road corridor contains a selection of retail from budget to upscale, between several community and neighborhood centers such as Hunter's Square (left) and Orchard Mall (right).

5. Gateway & Hunter's Square

The Gateway and Hunter's Square community centers are located at the terminus of Northwestern Highway, 5.2 miles to the northeast of city center. These community centers anchor a shopping agglomeration stretching northward along Orchard Lake Road in the city of West Bloomfield. Anchors in the community centers include Bed Bath & Beyond, Gap, Kohl's,

Loehmann's, Marshall's, Old Navy and Whole Foods Market. The neighborhood centers extending one mile north toward Maple Road host a unique variety of convenience and upscale retail, including Chico's, Plum Market and Stage Deli.



Figure 25: Novi Town Center (left) and West Oaks (right) add to the agglomeration of retail by Twelve Oaks Mall. (Image Source: (left) michigan.org (right) Ramco Gershenson).

6. West Oaks

Located between Twelve Mile Crossing at Fountain Walk and Twelve Oaks (6.6 miles from the study site), West Oaks is an impressive 389,094 sf shopping center managed by Ramco-Gershenson. The center was built in 1986 and is anchored by Bed Bath & Beyond, Best Buy, Big Lots Jo-Ann Fabrics, Kohl's, Marshalls and Toys 'R' Us.



Figure 26: Upscale neighborhood centers located along Orchard Lake Road include the Boardwalk (left) and The Shops at Old Orchard (right), where Plum Market is one of several specialty grocery stores in the area.

7. Orchard Lake Road

The Orchard Lake Road shopping corridor, just north of Hunter's Square about seven miles from the site, contains strong grocery competition, hosting Hiller's, Plum Market, Sam's Club, Trader Joe's and Whole Foods. Casual dining options along the corridor include California Pizza Kitchen, Max & Erma's, Olga's Kitchen and Outback Steakhouse. Specialty retail is concentrated in the corridor's northern anchor, the Orchard Mall neighborhood center. The 140,000 sf center contains a furrier, several salons, two bridal boutiques, a yoga studio and a massage parlor. Upscale regional grocery chain Hiller's anchors the plaza.

8. Commerce Crossing Shopping Center

About seven miles northwest of the site is the Commerce Crossing Shopping Center at Haggerty Road and 14 mile. This power center is anchored by Costco, Home Depot, PetSmart, Michaels, Staples and Target. In addition, it features a 14-screen United Artists Stadium movie theatre.



Figure 27: Wonderland Village and Millennium are two large centers located in Livonia. (Image Source: (left, Wonderland Village) Healthy Urgent Care (right Millennium Park) Ramco Geshenson).

9. Wonderland Village

Wonderland Village is a 427,700 sf shopping center developed by the Schostak Corporation in 2007. It is located eight miles south of the city center on the site of the demolished Wonderland Mall, which was open from 1959 to 2004. The Village is anchored by both Target and Walmart, although the construction of the latter was strongly opposed by the surrounding community.

10. Millennium Park

This appropriately named shopping center was built in 2000 and is managed by Ramco-Gershenson. Millennium Park is the largest community center in the area at 625,209 sf of leasable area. Located about eight miles south of Farmington at the intersection of Schoolcraft and Middlebelt Roads in Livonia, the shopping center is anchored by Costco, Home Depot, Marshalls, Meijer, Michaels and PetSmart.



Figure 28: Tel-Twelve Mall converted from an enclosed regional center to an outdoor community center in response to industry trends. The property contains a mix of big box retail and quick service dining.

11. Tel-Twelve Mall

Tel-Twelve Mall, located 8.2 miles northeast of downtown Farmington, opened in 1968 as a smaller enclosed regional center of 600,000 sf. Responding to changes in the marketplace,

the old center was demolished and redeveloped by Ramco-Gershenson as a 523,000 sf outdoor community center in stages between 2000 and 2006. Anchors include Best Buy, Lowe's Home Improvement and Meijer, complemented by DSW Shoe Warehouse, Michael's Crafts, Office Depot, PetSmart and Pier 1 Imports. Two outparcels fronting Telegraph Road total 25,000 sf and are devoted to convenience retail and dining, with tenants including Cosi and Quizno's. Situated directly north of the massive interchange between Telegraph Road, Interstate 696 and the Lodge Freeway/ Northwestern Highway (M-10), Tel-Twelve is surrounded by several separate convenience centers whose tenants include additional quick service restaurants.

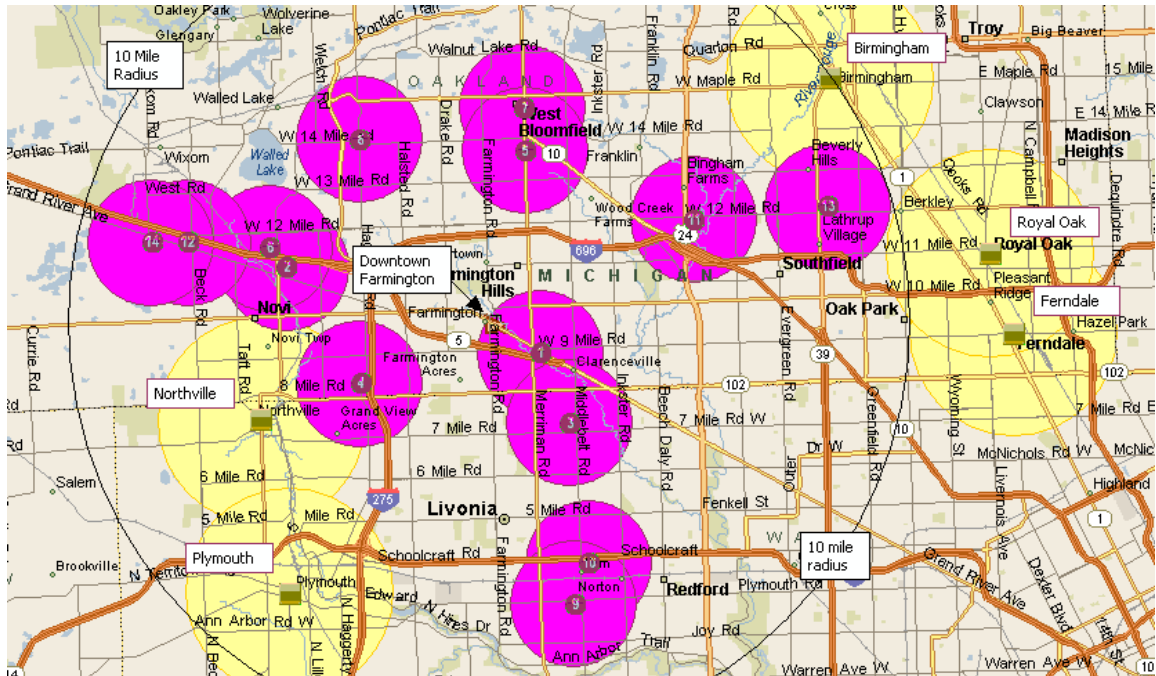


Figure 29: Competing downtowns (yellow) and community centers (purple, identified by corresponding numbers within the report) within 10 miles of downtown Farmington.

12. West Market Square

West Market Square is located on the northwest corner of Grand River Avenue and Beck Road, about 8.3 miles west of the site. It is owned by West Market Square LLC and has 299,616 sf of retail area. The shopping center is anchored by Home Depot, Kroger and Staples, and also features several restaurants and banks.

13. Southfield Plaza

Southfield Plaza, located about nine miles northeast of the site, has a gross leasable area of 190,099 sf and is anchored by Big Lots, Burlington Coat Factory and Marshalls. The shopping center was built in 1969 and is managed by Ramco-Gershenson. The center also has a large Planet Fitness and is nearby to both Home Depot and Target.

14. Novi Promenade

The Novi Promenade Shopping Center is located about nine miles west of the city center. Constructed between 2002 and 2005 it has a gross leasable area of 271,312 sf. The shopping center has a just few stores and banks but is anchored by a Sam's Club and a Target.



Figure 30: Beautiful landscaping, brick-pavers and street lighting complement a supply of local retailers catering to the nearby population.

SUMMARY of FINDINGS

This study finds that downtown Farmington is presently supportable with up to 111,500 sf of additional retail space. This new retail can potentially capture \$36.0 million of expenditures in 2014, growing to 125,900 sf and \$44.7 million by 2019. This retail development could include:

- **Corner Stores:** A corner store at 1,500 to 2,500 sf, located near the neighborhood entries along Grand River Avenue and Farmington Road.
- **Convenience Centers:** One to two 12,000 to 20,000 sf convenience centers located along Grand River Avenue or Farmington Road. These centers can include a wide range of retailers such as apparel, bakeries, electronics or phone stores, financial services, limited-service restaurants, jewelry, gift stores, shoes, or a pharmacy.
- **Neighborhood Centers:** One 60,000 to 100,000 sf neighborhood center located along Grand River Avenue. This center could support a medium-sized general merchandise store, a specialty grocer, apparel, an appliance store, beauty and personal care services, hardware, furniture, restaurants and a pet store.

These retail centers could be developed as conventional shopping centers or most likely as infill into the current walkable village.

The demographics of the primary trade area show a population base of 61,400, which will grow to 63,000 by 2019, at an annual growth rate of 0.52 percent. The persons-per-household is 2.24, and median age is 42.0 years old. Median household incomes of \$59,700 in the primary trade area are higher than the state and national averages, and a markedly higher average household income (\$84,400) suggests there are many wealthy residents within the trade area. Educational attainment is greater than the regional and state levels, as 46.9 percent of residents over the age of 25 have earned a bachelor's degree or higher.

Employment in the primary trade area favors the service sector (45.2 percent), while other strong sectors include retail (16.3 percent), manufacturing (13.0 percent) and finance, insurance and real estate (7.0 percent). There are nearly 70,000 employees within a 10-minute drive of the study site and over 30,000 employees are within the primary trade area. These daytime consumers expend over \$143.9 million annually, a portion of which is currently being captured by existing retailers. Significantly more expenditure from 10-minute drive time employees may be captured by new and existing retailers with effective marketing and a critical mass of restaurant and retail destinations.

Tapestry lifestyles in the market reflect a majority base of "Savvy Suburbanites" households, representing 15.9 percent of all households. These residents earn more than double the national median income and have considerable net worth. They enjoy home improvement projects and landscaping or gardening. Entertainment and recreation comprise a larger portion of the retail expenditure budget for purchases like apparel, jewelry and shoes.

Supportable 2019 Retail and Appropriate Tenant Discussion

- **34,900 sf Restaurants:** 16,100 sf of full service restaurants should complement existing offerings and diversify in appeal to families, professionals, empty nesters and retirees. Representative restaurants include Bar Louie, Maggiano's Little Italy, The Original Pancake House and Red Robin. The 18,800 sf of limited-service restaurants should focus on daytime employees and families. Representative retailers include Firehouse Subs, Moe's Southwest Grill, The Big Salad, and Pei Wei.
- **32,300 sf General Merchandise Stores:** This degree of demand would make the implementation of a national chain, such as Neighborhood Walmart, feasible. Alternatively, the demand could be split into three to four smaller local or regional stores with complimentary offerings.
- **9,800 sf Apparel Stores:** A mix of local boutiques each specializing in women's, children's or men's fashion would be appropriate and could be complemented with a national brand like Talbots or Jos A Bank.
- **7,900 sf Grocery Stores:** This demand would be appropriately filled by a specialty grocer with expertise in baked goods, produce, meats, wine or seafood.
- **7,200 sf Hardware & Lawn and Garden Stores:** With Ace, Aco and True Value locations nearby, attracting one of these stores downtown would fill the demand. Alternatively, a paint store like Sherwin Williams and/or a specialty lawn and garden store would work.
- **4,600 sf Electronics & Appliance Stores:** This demand could be met by a phone store and/or an appliance store like Maytag.

-
- **4,500 sf Miscellaneous Store Retailers:** Consumer demand in this category could justify the expansion of the neighborhood florists. A cigar shop and/or a pet shop are other appropriate options.
 - **4,300 sf Pharmacy:** This demand could be filled by a full-service pharmacy such as Walgreens, or a specialty health, natural medicine and supplements store.
 - **3,800 sf Furniture & Home Furnishings:** The demand in this category is split into 2,200 sf of furniture, for which a local furniture maker studio would be of interest, while 1,600 sf of home furnishings might include a candle shop or cookware. These two categories could be combined to include a small regional chain.
 - **3,400 sf Bars, Breweries & Pub:** A number of concepts could be deployed to fit this demand including an additional location for one of the many drinking establishments in other area downtowns.
 - **3,200 sf Special Food Services:** The category includes businesses such as a local bakery, butcher, or some form of catering business.
 - **2,600 sf Office Supply and Gift Stores:** An exceptionally curated gift store would be an added destination downtown. Similarly, a unique greeting card store would attract resident expenditure.
 - **2,200 sf Craft Beer, Spirits & Fine Wine Stores:** This category could be incorporated into the corner store or as a tasting room for a local spirit or wine tasting room.
 - **1,500 sf Book & Music Stores:** One of the bookstores already located downtown could expand to offer music, periodicals or magazines.
 - **1,400 sf Jewelry Stores:** A local jeweler would be most attractive to residents.
 - **1,200 sf Sporting Goods:** The size of this demand would be sufficient for a local merchant dealing in water sports, running, camping or cycling.
 - **1,100 sf Shoe Stores:** A women's or men's fashion shoe store would complement the downtown apparel stores.

A detailed examination of the supportable sf of retail uses is found in the following Table 9:

**Table 9: Supportable Retail Table
Downtown Farmington Primary Trade Area**

Retail Category	2014 Estimated Retail Sales	2014 Sales/SF	2014 Estimated Supportable SF	2019 Estimated RetailSales	2019 Sales/SF	2019 Estimated Supportable SF	No. of Stores
Retailers							
Apparel Stores	\$2,554,999	\$292	8,750	\$3,169,780	\$324	9,783	3 - 4
Book & Music Stores	\$328,095	\$245	1,339	\$395,010	\$270	1,463	1
Craft Beer, Spirits & Fine Wine Stores	\$552,912	\$300	1,843	\$737,965	\$333	2,216	1 - 2
Electronics & Appliance Stores	\$1,284,312	\$305	4,211	\$1,531,154	\$335	4,571	2 - 3
Furniture Stores	\$559,808	\$268	2,089	\$658,457	\$296	2,225	1
General Merchandise Stores	\$9,175,131	\$335	27,388	\$11,951,055	\$370	32,300	1 - 3
Grocery Stores	\$2,552,198	\$420	6,077	\$3,744,502	\$475	7,883	1
Hardware	\$1,471,124	\$265	5,551	\$1,807,821	\$290	6,234	1
Home Furnishings Stores	\$398,655	\$275	1,450	\$482,380	\$305	1,582	1
Jewelry Stores	\$477,370	\$360	1,326	\$564,350	\$398	1,418	1 - 2
Lawn & Garden Supply Stores	\$226,284	\$255	887	\$271,200	\$284	955	1
Miscellaneous Store Retailers	\$1,245,682	\$285	4,371	\$1,420,966	\$315	4,511	2 - 3
Office Supplies & Gift Stores	\$667,246	\$264	2,527	\$722,821	\$282	2,563	1 - 2
Pharmacy	\$1,217,550	\$325	3,746	\$1,562,786	\$358	4,365	1
Shoe Stores	\$282,646	\$285	992	\$337,349	\$316	1,068	1
Sporting Goods & Hobby Stores	\$221,368	\$272	814	\$378,058	\$300	1,260	1
Retailer Totals	\$23,215,381	\$297	73,362	\$30,066,877	\$328	84,396	20 - 28
Restaurants							
Bars, Breweries & Pubs	\$1,036,199	\$333	3,112	\$1,208,596	\$360	3,357	1
Full-Service Restaurants	\$5,065,570	\$345	14,683	\$6,118,382	\$380	16,101	3 - 4
Limited-Service Eating Places	\$5,780,866	\$335	17,256	\$6,958,403	\$370	18,806	4 - 5
Special Food Services	\$963,666	\$310	3,109	\$1,093,828	\$340	3,217	1 - 2
Restaurant Totals	\$12,846,302	\$331	38,159	\$14,694,724	\$365	41,482	9 - 12
Retail & Restaurant Totals	\$36,061,684	\$305	111,521	\$44,761,601	\$337	125,878	29 - 40

Table 19 Sales stated in constant 2014 dollars.

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.

Rationale

The rationale for the findings in this study follows:

- **Captive consumer market:** Residents in the primary trade area likely pass within a few blocks of downtown Farmington daily. The demands of daily life suggest many consumer purchases are made on the way to and from work. Convenient parking and a critical mass of desired retail and restaurants could increase expenditure from area commuters.
- **Strong daytime employment base:** There are nearly 70,000 employees within a 10-minute drive of the study area. These daytime consumers expend \$143.9 million annually in the local economy and supplement the residential consumer base.
- **Demographic and economic growth:** Population in the primary trade area is expected to increase by 0.52 percent annually, expanding the consumer base nearest downtown Farmington. Additionally, median incomes are projected to grow by 3.85 percent annually increasing the amount of disposable income for retail purchases.
- **Exceptional regional access:** Approximately 400,000 cars pass within a few miles of downtown on a daily basis. This suggests a large number of Metro-Detroit residents can easily reach downtown Farmington in a reasonable amount of time. The surrounding expressways have created the current retail patterns showing agglomerations of commercial development outside of the trade area, a void that could be filled by additional retail development downtown.

Limits of Study

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

No responsibility is assumed for inaccuracies in reporting by the client, its agent and representatives or in any other data source used in preparing or presenting this study. This report

is based on information that was current as of July 21, 2014 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 variables including the type, design and quality of the new development. It is plausible that a walkable town center, with well-designed buildings and public realm, could draw visitors from beyond this study's estimated trade area boundaries and considerably outperform the site's location and limited market potential. This would require an extraordinary development team and retailer mix unique to the market, including anchor retailers. On the other hand, a poorly implemented commercial center or badly managed businesses could underperform the location.

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

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

-- END OF ANALYSIS -

Appendix A1: Primary Trade Area Business Summary

Gibbs Planning Group

Business Summary

Farmington Hills Primary
Area: 21.69 square miles

Latitude: 42.46051631
Longitude: -83.3762924

Data for all businesses in area

Total Businesses:	4,909
Total Employees:	30,484
Total Residential Population:	61,438
Employee/Residential Population Ratio:	0.5:1

	Number		Percent		Employees	
	Number	Percent	Number	Percent	Number	Percent
by SIC Codes						
Agriculture & Mining	120	2.4%	364	1.2%		
Construction	396	8.1%	1,771	5.8%		
Manufacturing	209	4.3%	3,966	13.0%		
Transportation	106	2.2%	654	2.1%		
Communication	37	0.8%	225	0.7%		
Utility	10	0.2%	85	0.3%		
Wholesale Trade	254	5.2%	2,140	7.0%		
Retail Trade Summary	529	10.8%	4,954	16.3%		
Home Improvement	25	0.5%	312	1.0%		
General Merchandise Stores	15	0.3%	948	3.1%		
Food Stores	46	0.9%	445	1.5%		
Auto Dealers, Gas Stations, Auto Aftermarket	65	1.3%	743	2.4%		
Apparel & Accessory Stores	28	0.6%	107	0.4%		
Furniture & Home Furnishings	35	0.7%	174	0.6%		
Eating & Drinking Places	134	3.1%	1,515	5.0%		
Miscellaneous Retail	161	3.3%	710	2.3%		
Finance, Insurance, Real Estate Summary	368	7.5%	2,017	6.6%		
Banks, Savings & Lending Institutions	43	0.9%	308	1.0%		
Securities Brokers	25	0.5%	100	0.3%		
Insurance Carriers & Agents	74	1.5%	552	1.8%		
Real Estate, Holding, Other Investment Offices	225	4.6%	1,057	3.5%		
Services Summary	2,343	47.7%	13,781	45.2%		
Hotels & Lodging	11	0.2%	85	0.3%		
Automotive Services	93	1.9%	393	1.3%		
Motion Pictures & Amusements	107	2.2%	440	1.4%		
Health Services	311	6.3%	1,971	6.5%		
Legal Services	60	1.2%	288	0.9%		
Education Institutions & Libraries	76	1.5%	1,688	5.5%		
Other Services	1,685	34.3%	8,915	29.2%		
Government	20	0.4%	517	1.7%		
Unclassified Establishments	518	10.6%	11	0.0%		
Totals	4,909	100.0%	30,484	100.0%		

Sources: Copyright 2014 Dun & Bradstreet, Inc. All rights reserved. Esri Total Residential Population forecasts for 2014.

Appendix A2: Primary Trade Area Business Summary

Business Summary

Gibbs Planning Group

Farmington Hills Primary
Area: 21.69 square miles

Latitude: 42.46051631
Longitude: -83.3762924

Data for all businesses in area			
	Total Businesses:	4,909	
	Total Employees:	30,484	
	Total Residential Population:	61,438	
	Employee/Residential Population Ratio:	0.5:1	
by SIC Codes	Number	Percent	Employees
	Number	Percent	Number
Agriculture & Mining	120	2.4%	364
Construction	396	8.1%	1,771
Manufacturing	209	4.3%	3,966
Transportation	106	2.2%	654
Communication	37	0.8%	225
Utility	10	0.2%	85
Wholesale Trade	254	5.2%	2,140
Retail Trade Summary	529	10.8%	4,954
Home Improvement	25	0.5%	312
General Merchandise Stores	15	0.3%	948
Food Stores	46	0.9%	445
Auto Dealers, Gas Stations, Auto Aftermarket	65	1.3%	743
Apparel & Accessory Stores	28	0.6%	107
Furniture & Home Furnishings	35	0.7%	174
Eating & Drinking Places	154	3.1%	1,515
Miscellaneous Retail	161	3.3%	710
Finance, Insurance, Real Estate Summary	368	7.5%	2,017
Banks, Savings & Lending Institutions	43	0.9%	308
Securities Brokers	25	0.5%	100
Insurance Carriers & Agents	74	1.5%	552
Real Estate, Holding, Other Investment Offices	225	4.6%	1,057
Services Summary	2,343	47.7%	13,761
Hotels & Lodging	11	0.2%	85
Automotive Services	93	1.9%	393
Motion Pictures & Amusements	107	2.2%	440
Health Services	311	6.3%	1,971
Legal Services	60	1.2%	288
Education Institutions & Libraries	76	1.5%	1,688
Other Services	1,685	34.3%	8,915
Government	20	0.4%	517
Unclassified Establishments	518	10.6%	11
Totals	4,909	100.0%	30,484

Source: Copyright 2014 Dun & Bradstreet, Inc. All rights reserved. Esri Total Residential Population forecasts for 2014.

Appendix B1: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

Farmington Hills Primary
Area: 21.69 square miles

Latitude: 42.46051631

Longitude: -83.3762924

Population Summary	
2000 Total Population	61,695
2010 Total Population	60,398
2014 Total Population	61,438
2014 Group Quarters	629
2019 Total Population	63,067
2014-2019 Annual Rate	0.52%
Household Summary	
2000 Households	26,588
2000 Average Household Size	2.28
2010 Households	26,470
2010 Average Household Size	2.26
2014 Households	27,189
2014 Average Household Size	2.24
2019 Households	28,067
2019 Average Household Size	2.22
2014-2019 Annual Rate	0.64%
2010 Families	15,945
2010 Average Family Size	2.94
2014 Families	16,136
2014 Average Family Size	2.94
2019 Families	16,465
2019 Average Family Size	2.94
2014-2019 Annual Rate	0.40%
Housing Unit Summary	
2000 Housing Units	27,601
Owner Occupied Housing Units	59.8%
Renter Occupied Housing Units	36.5%
Vacant Housing Units	3.7%
2010 Housing Units	28,611
Owner Occupied Housing Units	56.3%
Renter Occupied Housing Units	36.3%
Vacant Housing Units	7.5%
2014 Housing Units	28,886
Owner Occupied Housing Units	55.6%
Renter Occupied Housing Units	38.5%
Vacant Housing Units	5.9%
2019 Housing Units	29,481
Owner Occupied Housing Units	55.6%
Renter Occupied Housing Units	39.6%
Vacant Housing Units	4.8%
Median Household Income	
2014	\$59,697
2019	\$72,092
Median Home Value	
2014	\$192,694
2019	\$225,798
Per Capita Income	
2014	\$37,424
2019	\$42,699
Median Age	
2010	41.0
2014	42.0
2019	42.7

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 2014 and 2019. Esri converted Census 2000 data into 2010 geography.

Appendix B2: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

Farmington Hills Primary
Area: 21.69 square miles

Latitude: 42.46051631
Longitude: -83.3762924

2014 Households by Income	
Household Income Base	27,189
<\$15,000	8.5%
\$15,000 - \$24,999	10.3%
\$25,000 - \$34,999	9.1%
\$35,000 - \$49,999	12.7%
\$50,000 - \$74,999	19.1%
\$75,000 - \$99,999	14.6%
\$100,000 - \$149,999	11.0%
\$150,000 - \$199,999	7.9%
\$200,000+	6.6%
Average Household Income	\$84,423
2019 Households by Income	
Household Income Base	28,067
<\$15,000	7.5%
\$15,000 - \$24,999	7.2%
\$25,000 - \$34,999	7.3%
\$35,000 - \$49,999	11.3%
\$50,000 - \$74,999	18.2%
\$75,000 - \$99,999	16.8%
\$100,000 - \$149,999	14.3%
\$150,000 - \$199,999	9.3%
\$200,000+	8.0%
Average Household Income	\$95,937
2014 Owner Occupied Housing Units by Value	
Total	16,066
<\$50,000	2.9%
\$50,000 - \$99,999	10.0%
\$100,000 - \$149,999	20.5%
\$150,000 - \$199,999	19.4%
\$200,000 - \$249,999	17.2%
\$250,000 - \$299,999	14.8%
\$300,000 - \$399,999	11.7%
\$400,000 - \$499,999	2.3%
\$500,000 - \$749,999	1.0%
\$750,000 - \$999,999	0.1%
\$1,000,000 +	0.0%
Average Home Value	\$206,272
2019 Owner Occupied Housing Units by Value	
Total	16,399
<\$50,000	0.8%
\$50,000 - \$99,999	2.4%
\$100,000 - \$149,999	12.5%
\$150,000 - \$199,999	22.6%
\$200,000 - \$249,999	22.5%
\$250,000 - \$299,999	18.3%
\$300,000 - \$399,999	14.4%
\$400,000 - \$499,999	4.4%
\$500,000 - \$749,999	1.8%
\$750,000 - \$999,999	0.2%
\$1,000,000 +	0.0%
Average Home Value	\$241,568

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 2014 and 2019. Esri converted Census 2000 data into 2010 geography.

Appendix B3: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

Farmington Hills Primary
Area: 21.69 square miles

Latitude: 42.46051631
Longitude: -83.3762924

2010 Population by Age	
Total	60,397
0 - 4	5.3%
5 - 9	5.5%
10 - 14	5.7%
15 - 24	11.5%
25 - 34	13.9%
35 - 44	13.4%
45 - 54	16.1%
55 - 64	13.4%
65 - 74	7.1%
75 - 84	5.4%
85 +	2.7%
18 +	79.5%
2014 Population by Age	
Total	61,436
0 - 4	5.0%
5 - 9	5.4%
10 - 14	5.6%
15 - 24	11.3%
25 - 34	13.7%
35 - 44	13.0%
45 - 54	14.4%
55 - 64	14.8%
65 - 74	8.8%
75 - 84	5.0%
85 +	2.9%
18 +	80.6%
2019 Population by Age	
Total	63,068
0 - 4	5.0%
5 - 9	5.2%
10 - 14	5.5%
15 - 24	10.4%
25 - 34	13.6%
35 - 44	13.1%
45 - 54	13.1%
55 - 64	15.0%
65 - 74	10.8%
75 - 84	5.3%
85 +	2.9%
18 +	81.0%
2010 Population by Sex	
Males	28,532
Females	31,866
2014 Population by Sex	
Males	29,073
Females	32,366
2019 Population by Sex	
Males	29,945
Females	33,123

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2014 and 2019. Esri converted Census 2000 data into 2010 geography.

Appendix B4: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

Farmington Hills Primary
Area: 21.69 square miles

Latitude: 42.46051631
Longitude: -83.3762924

2010 Population by Race/Ethnicity	
Total	60,398
White Alone	72.3%
Black Alone	14.3%
American Indian Alone	0.3%
Asian Alone	10.7%
Pacific Islander Alone	0.0%
Some Other Race Alone	0.5%
Two or More Races	1.9%
Hispanic Origin	2.2%
Diversity Index	46.9
2014 Population by Race/Ethnicity	
Total	61,438
White Alone	69.2%
Black Alone	16.2%
American Indian Alone	0.3%
Asian Alone	11.7%
Pacific Islander Alone	0.0%
Some Other Race Alone	0.5%
Two or More Races	2.1%
Hispanic Origin	2.4%
Diversity Index	50.5
2019 Population by Race/Ethnicity	
Total	63,067
White Alone	65.3%
Black Alone	18.6%
American Indian Alone	0.3%
Asian Alone	13.0%
Pacific Islander Alone	0.0%
Some Other Race Alone	0.5%
Two or More Races	2.3%
Hispanic Origin	2.7%
Diversity Index	54.7
2010 Population by Relationship and Household Type	
Total	60,398
In Households	98.9%
In Family Households	78.8%
Householder	26.4%
Spouse	20.6%
Child	28.1%
Other relative	2.7%
Nonrelative	1.1%
In Nonfamily Households	20.2%
In Group Quarters	1.1%
Institutionalized Population	0.7%
Noninstitutionalized Population	0.4%

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 2014 and 2019. Esri converted Census 2000 data into 2010 geography.

Appendix B5: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

Farmington Hills Primary
Area: 21.69 square miles

Latitude: 42.46051631
Longitude: -83.3762924

2014 Population 25+ by Educational Attainment	
Total	44,650
Less than 9th Grade	2.3%
9th - 12th Grade, No Diploma	4.6%
High School Graduate	16.5%
GED/Alternative Credential	1.9%
Some College, No Degree	20.7%
Associate Degree	7.0%
Bachelor's Degree	27.6%
Graduate/Professional Degree	19.3%
2014 Population 15+ by Marital Status	
Total	51,594
Never Married	29.4%
Married	52.0%
Widowed	7.3%
Divorced	11.3%
2014 Civilian Population 16+ in Labor Force	
Civilian Employed	94.5%
Civilian Unemployed	5.5%
2014 Employed Population 16+ by Industry	
Total	32,597
Agriculture/Mining	0.2%
Construction	3.5%
Manufacturing	16.6%
Wholesale Trade	2.4%
Retail Trade	9.4%
Transportation/Utilities	3.2%
Information	1.8%
Finance/Insurance/Real Estate	8.7%
Services	51.7%
Public Administration	2.6%
2014 Employed Population 16+ by Occupation	
Total	32,594
White Collar	73.4%
Management/Business/Financial	17.2%
Professional	32.9%
Sales	11.1%
Administrative Support	12.2%
Services	14.0%
Blue Collar	12.5%
Farming/Forestry/Fishing	0.1%
Construction/Extraction	2.5%
Installation/Maintenance/Repair	1.8%
Production	4.8%
Transportation/Material Moving	3.4%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2014 and 2019. Esri converted Census 2000 data into 2010 geography.

Appendix B6: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

Farmington Hills Primary
Area: 21.69 square miles

Latitude: 42.46051631
Longitude: -83.3762924

2010 Households by Type	
Total	26,470
Households with 1 Person	34.4%
Households with 2+ People	65.6%
Family Households	60.2%
Husband-wife Families	47.1%
With Related Children	20.0%
Other Family (No Spouse Present)	13.2%
Other Family with Male Householder	3.1%
With Related Children	1.5%
Other Family with Female Householder	10.1%
With Related Children	5.7%
Nonfamily Households	5.3%
All Households with Children	27.4%
Multigenerational Households	2.2%
Unmarried Partner Households	4.4%
Male-female	4.0%
Same-sex	0.5%
2010 Households by Size	
Total	26,469
1 Person Household	34.4%
2 Person Household	32.3%
3 Person Household	15.3%
4 Person Household	11.6%
5 Person Household	4.4%
6 Person Household	1.4%
7 + Person Household	0.6%
2010 Households by Tenure and Mortgage Status	
Total	26,470
Owner Occupied	60.8%
Owned with a Mortgage/Loan	44.2%
Owned Free and Clear	16.6%
Renter Occupied	39.2%

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 2014 and 2019. Esri converted Census 2000 data into 2010 geography.

Appendix C1: Primary Trade Area Housing Profile

Gibbs Planning Group

Housing Profile

Farmington Hills Primary
Area: 21.69 square miles

Latitude: 42.46051631
Longitude: -83.3762924

Population		Households	
2010 Total Population	60,398	2014 Median Household Income	\$59,697
2014 Total Population	61,438	2019 Median Household Income	\$72,092
2019 Total Population	63,067	2014-2019 Annual Rate	3.85%
2014-2019 Annual Rate	0.52%		

Housing Units by Occupancy Status and Tenure	Census 2010		2014		2019	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	28,611	100.0%	28,886	100.0%	29,481	100.0%
Occupied	26,470	92.5%	27,188	94.1%	28,067	95.2%
Owner	16,097	56.3%	16,068	55.6%	16,401	55.6%
Renter	10,373	36.3%	11,120	38.5%	11,666	39.6%
Vacant	2,141	7.5%	1,697	5.9%	1,414	4.8%

Owner Occupied Housing Units by Value	2014		2019	
	Number	Percent	Number	Percent
Total	16,067	100.0%	16,399	100.0%
<\$50,000	461	2.9%	131	0.8%
\$50,000-\$99,999	1,610	10.0%	395	2.4%
\$100,000-\$149,999	3,295	20.5%	2,057	12.5%
\$150,000-\$199,999	3,124	19.4%	3,710	22.6%
\$200,000-\$249,999	2,768	17.2%	3,695	22.5%
\$250,000-\$299,999	2,379	14.8%	3,000	18.3%
\$300,000-\$399,999	1,873	11.7%	2,366	14.4%
\$400,000-\$499,999	375	2.3%	718	4.4%
\$500,000-\$749,999	158	1.0%	295	1.8%
\$750,000-\$999,999	18	0.1%	26	0.2%
\$1,000,000+	6	0.0%	6	0.0%
Median Value		\$192,694		\$225,798
Average Value		\$206,272		\$241,568

Data Note: Persons of Hispanic Origin may be of any race.
Source: U.S. Census Bureau, Census 2010 Summary File 1.

Appendix C2: Primary Trade Area Housing Profile

Gibbs Planning Group

Housing Profile

Farmington Hills Primary
Area: 21.69 square miles

Latitude: 42.46051631
Longitude: -83.3762924

Population		Households	
2010 Total Population	60,398	2014 Median Household Income	\$59,697
2014 Total Population	61,438	2019 Median Household Income	\$72,092
2019 Total Population	63,067	2014-2019 Annual Rate	3.85%
2014-2019 Annual Rate	0.52%		

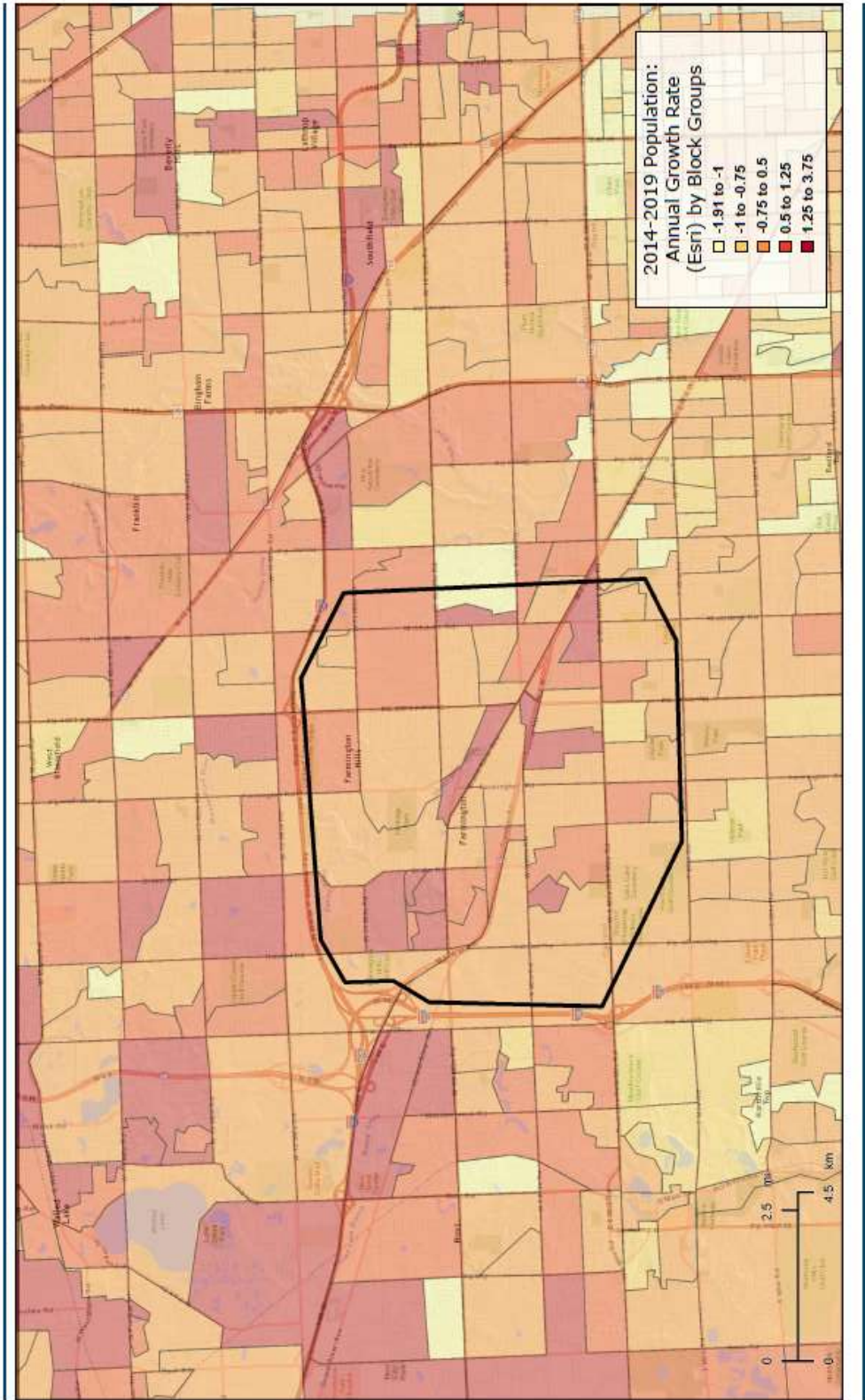
Housing Units by Occupancy Status and Tenure	Census 2010		2014		2019	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	28,611	100.0%	28,886	100.0%	29,481	100.0%
Occupied	26,470	92.5%	27,188	94.1%	28,067	95.2%
Owner	16,097	56.3%	16,068	55.6%	16,401	55.6%
Renter	10,373	36.3%	11,120	38.5%	11,666	39.6%
Vacant	2,141	7.5%	1,697	5.9%	1,414	4.8%

Owner Occupied Housing Units by Value	2014		2019	
	Number	Percent	Number	Percent
Total	16,067	100.0%	16,399	100.0%
<\$50,000	461	2.9%	131	0.8%
\$50,000-\$99,999	1,610	10.0%	395	2.4%
\$100,000-\$149,999	3,295	20.5%	2,057	12.5%
\$150,000-\$199,999	3,124	19.4%	3,710	22.6%
\$200,000-\$249,999	2,768	17.2%	3,695	22.5%
\$250,000-\$299,999	2,379	14.8%	3,000	18.3%
\$300,000-\$399,999	1,873	11.7%	2,366	14.4%
\$400,000-\$499,999	375	2.3%	718	4.4%
\$500,000-\$749,999	158	1.0%	295	1.8%
\$750,000-\$999,999	18	0.1%	26	0.2%
\$1,000,000+	6	0.0%	6	0.0%
Median Value		\$192,694		\$225,798
Average Value		\$206,272		\$241,568

Data Note: Persons of Hispanic Origin may be of any race.
Source: U.S. Census Bureau, Census 2010 Summary File 1.

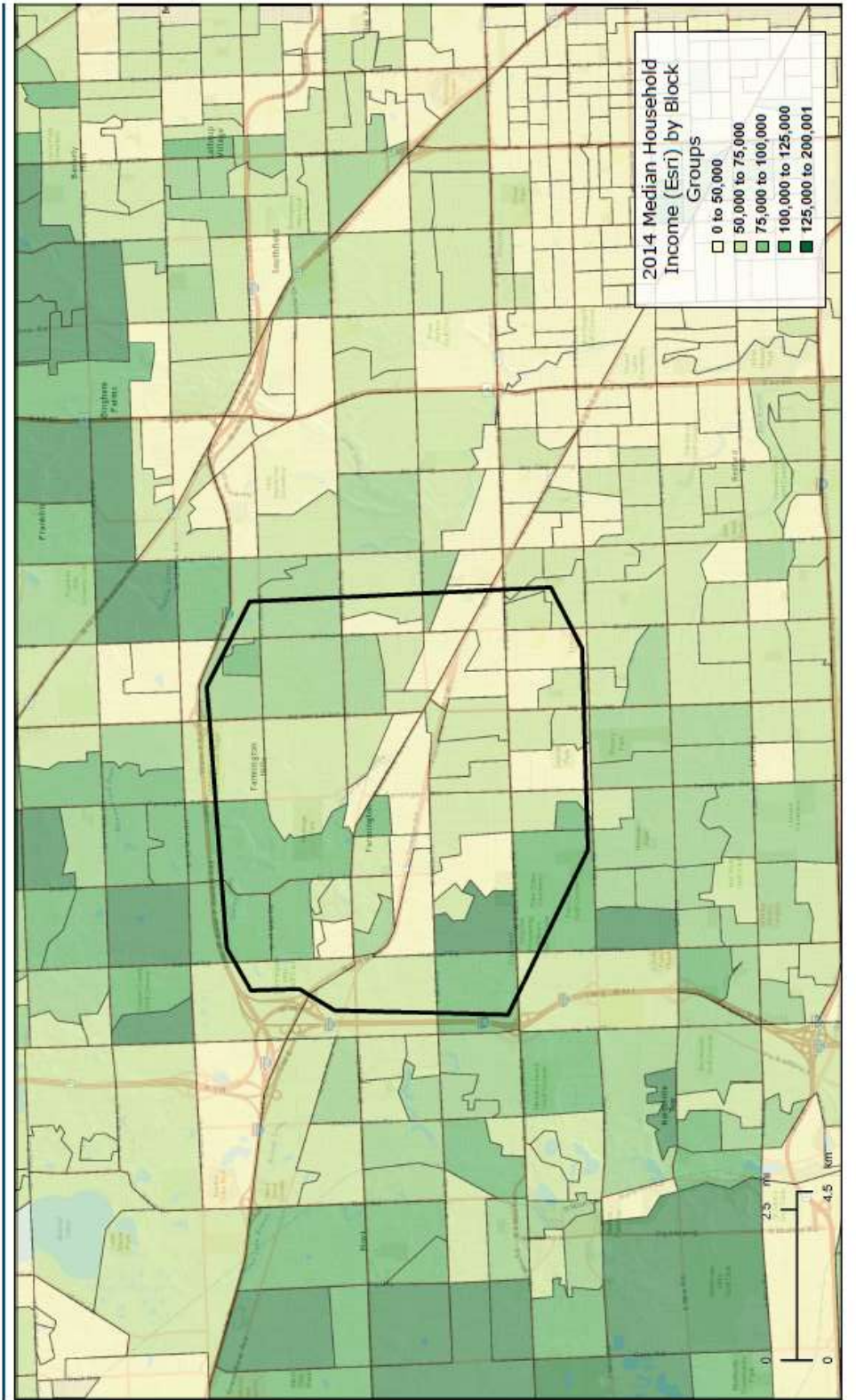
Appendix D: 2014-2019 Annual Growth Rate

2014-2019 Population: Annual Growth Rate (Esri) by Block Groups



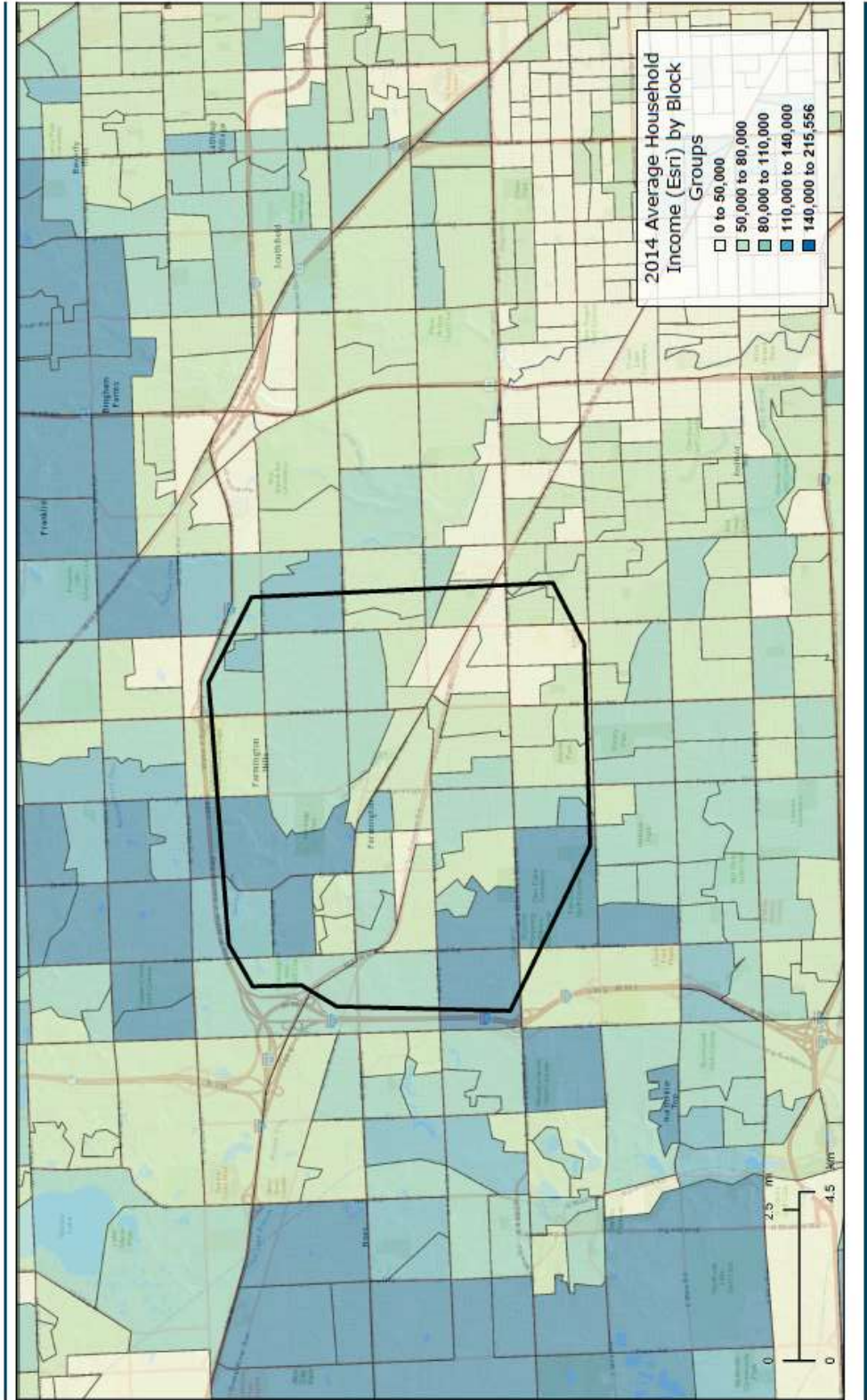
Appendix E: 2014 Median Household Income

2014 Median Household Income (Esri) by Block Groups



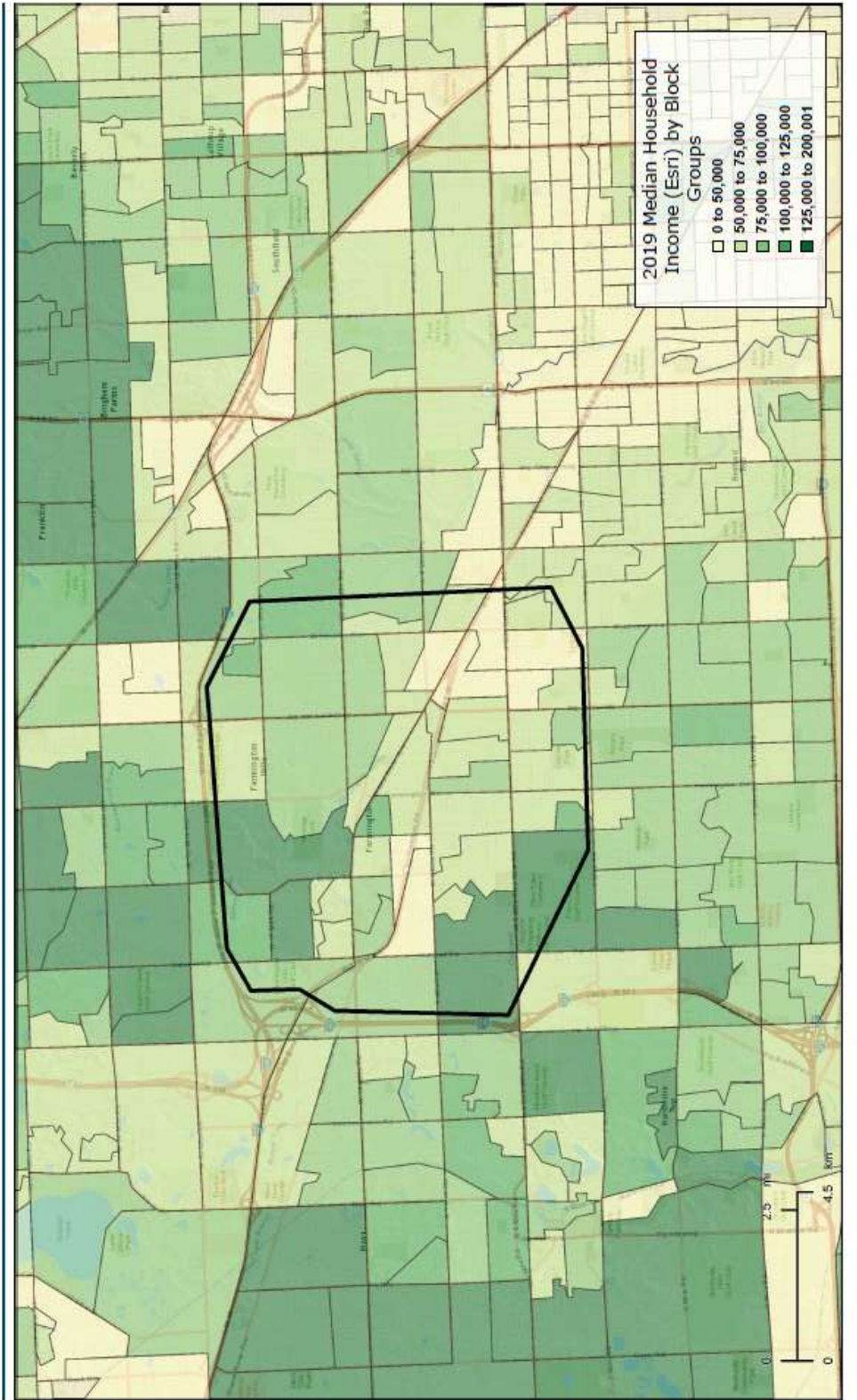
Appendix F: 2014 Average Household Income

2014 Average Household Income (Esri) by Block Groups



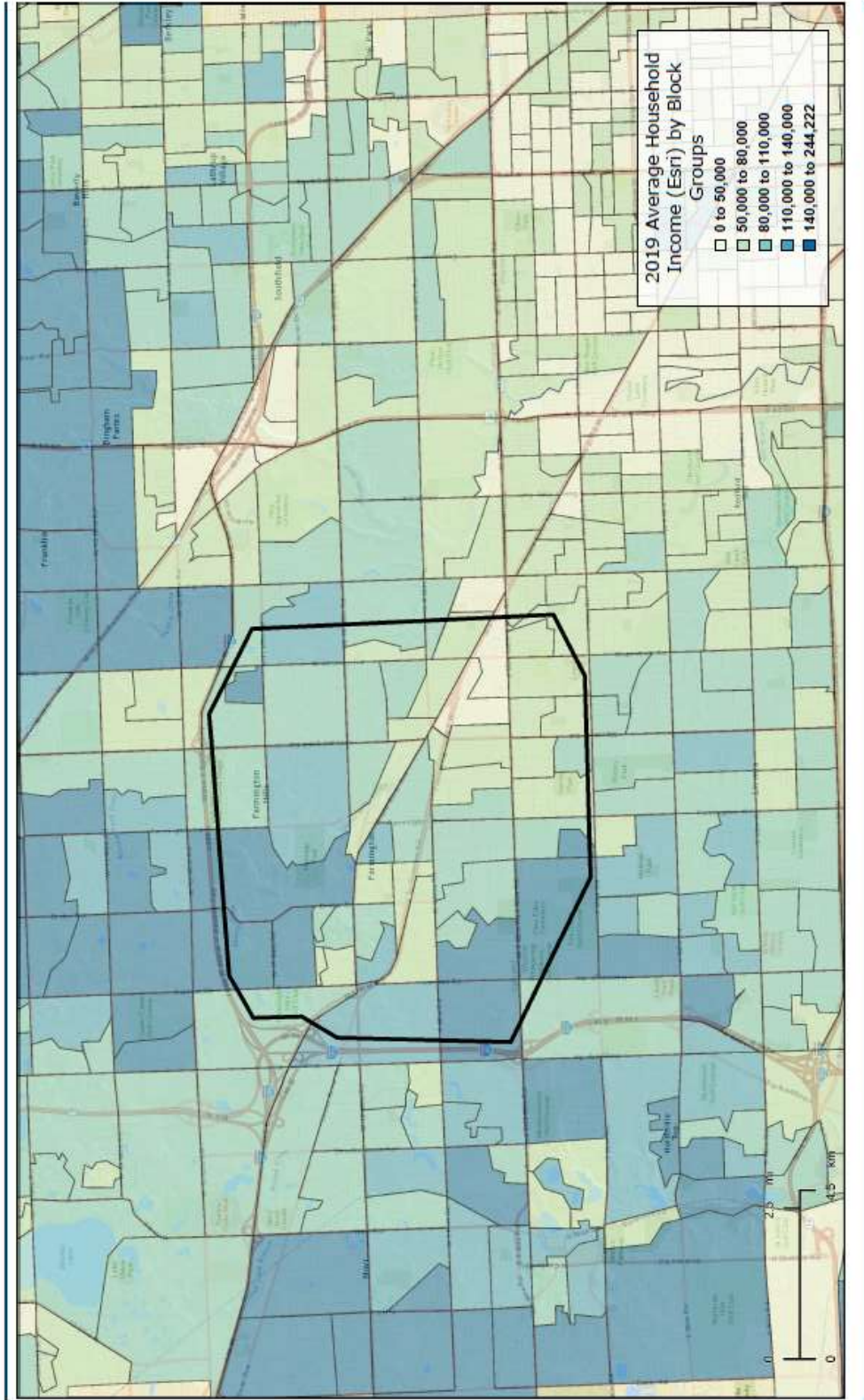
Appendix G: 2019 Median Household Income

2019 Median Household Income (Esri) by Block Groups



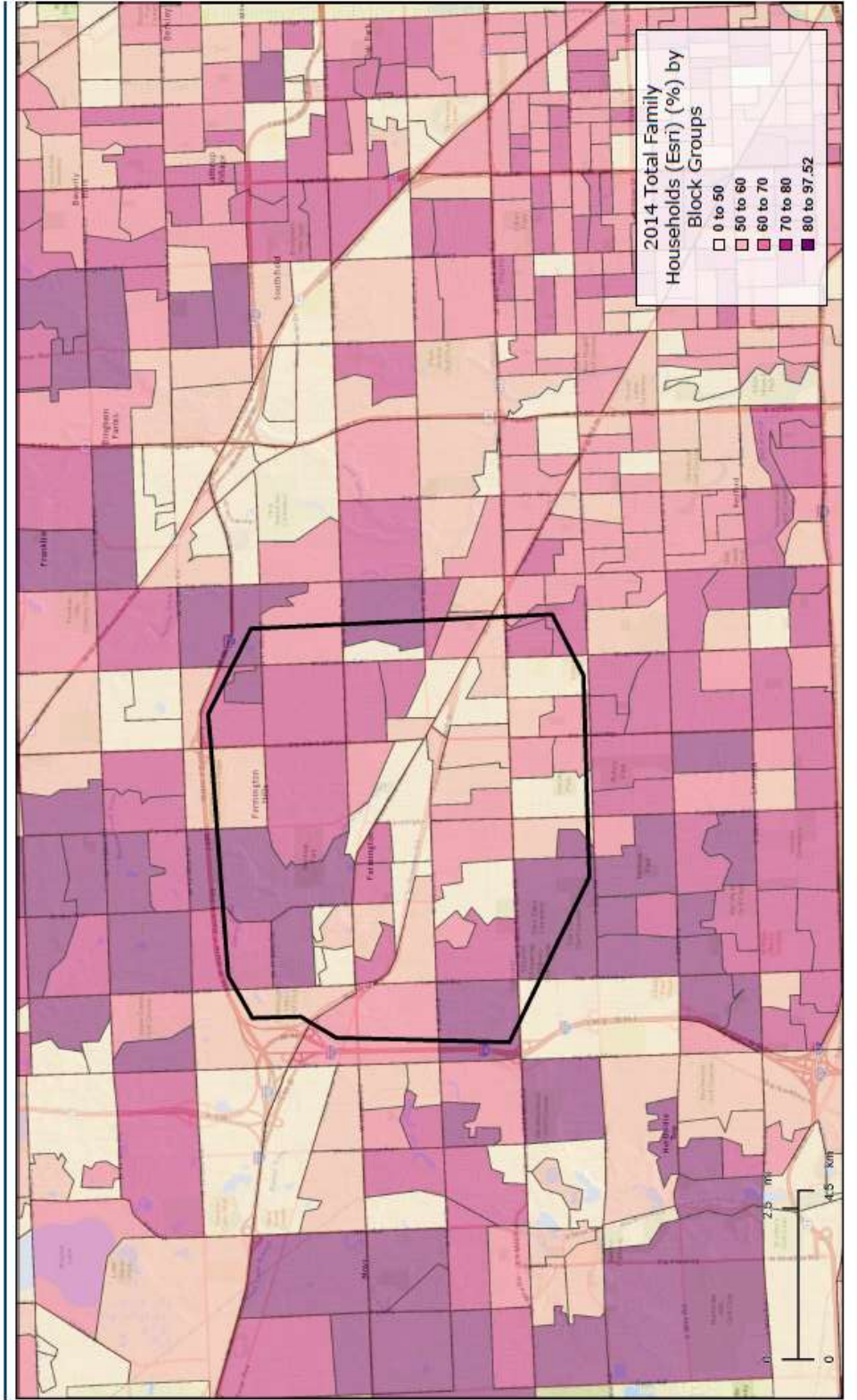
Appendix H: 2019 Average Household Income

2019 Average Household Income (Esri) by Block Groups

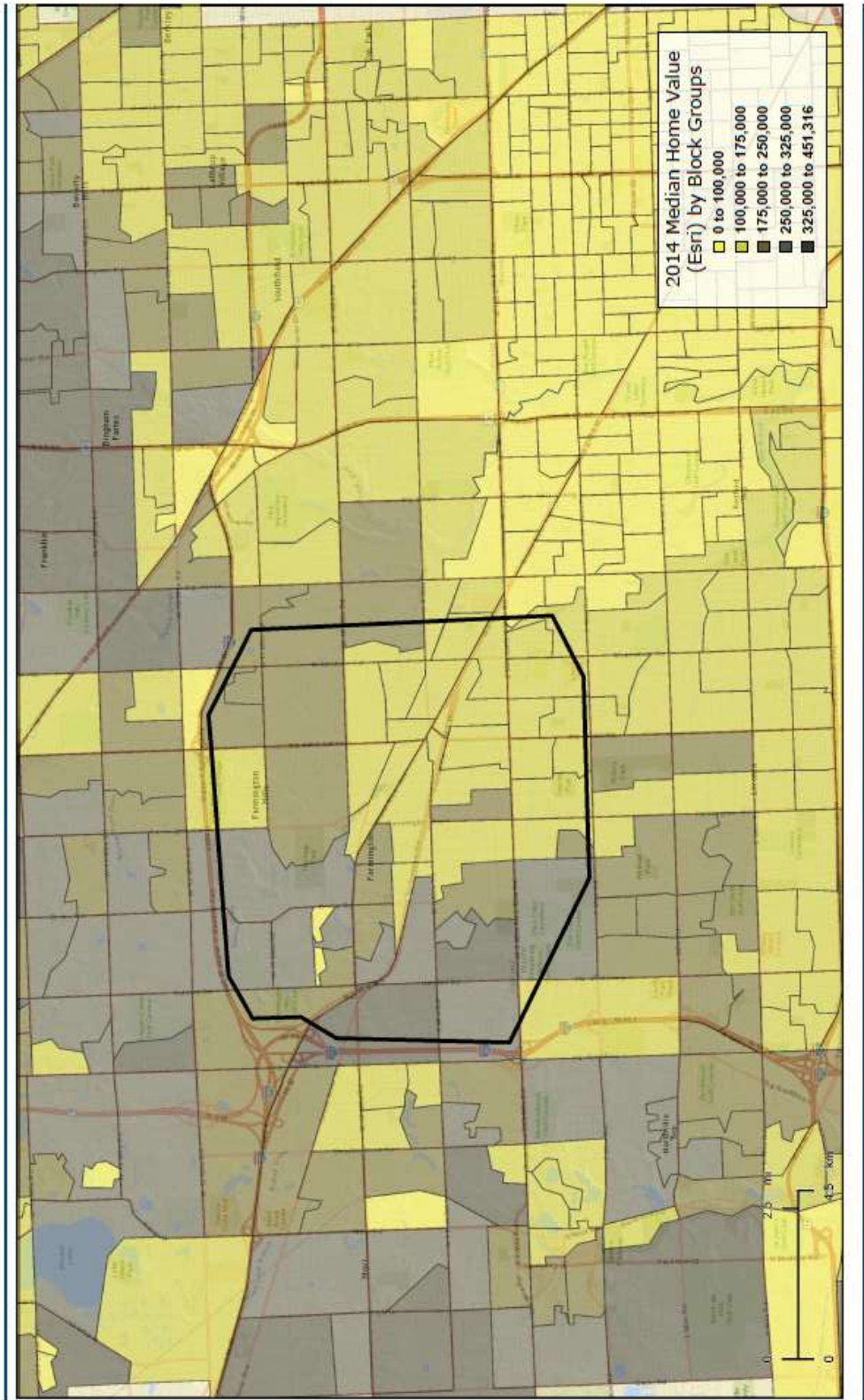


Appendix I: 2014 Percent of Family Households

2014 Total Family Households (Esri) (%) by Block Groups

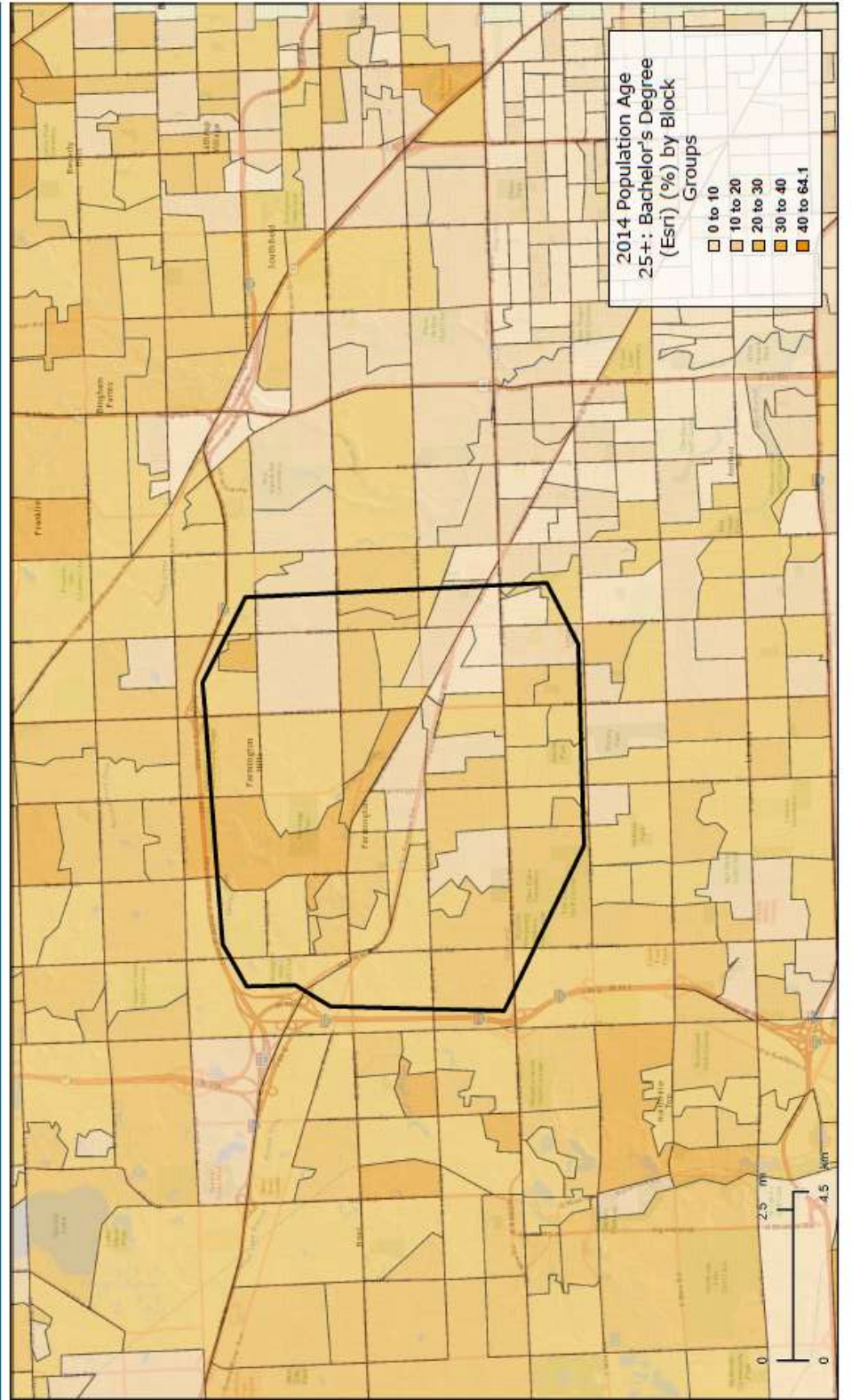


2014 Median Home Value (Esri) by Block Groups



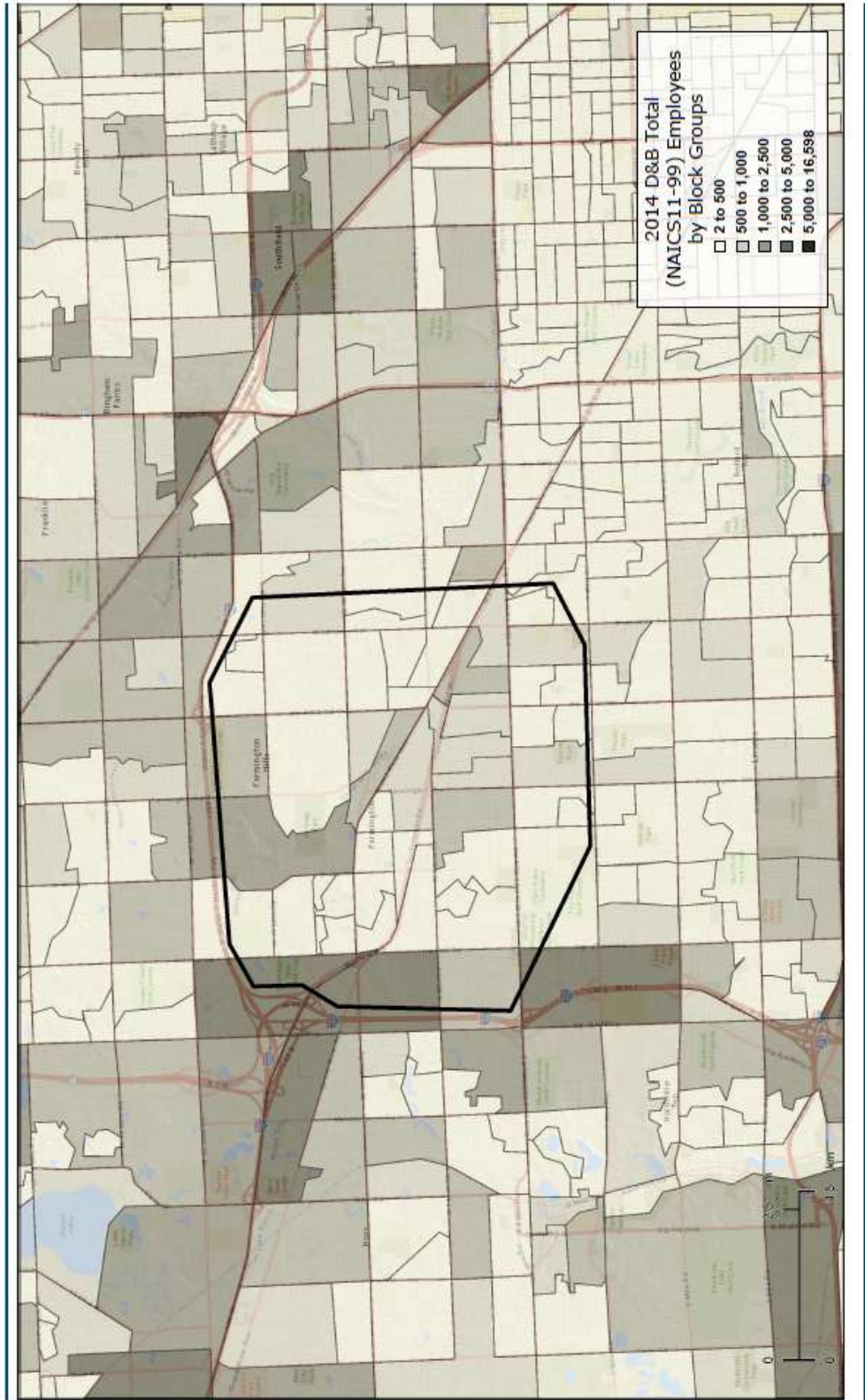
Appendix K: 2014 Percent Population with Bachelor's Degree or Higher

2014 Population Age 25+: Bachelor's Degree (Esri) (%) by Block Groups



Appendix L: 2014 Total Employees

2014 D&B Total (NAICS11-99) Employees by Block Groups

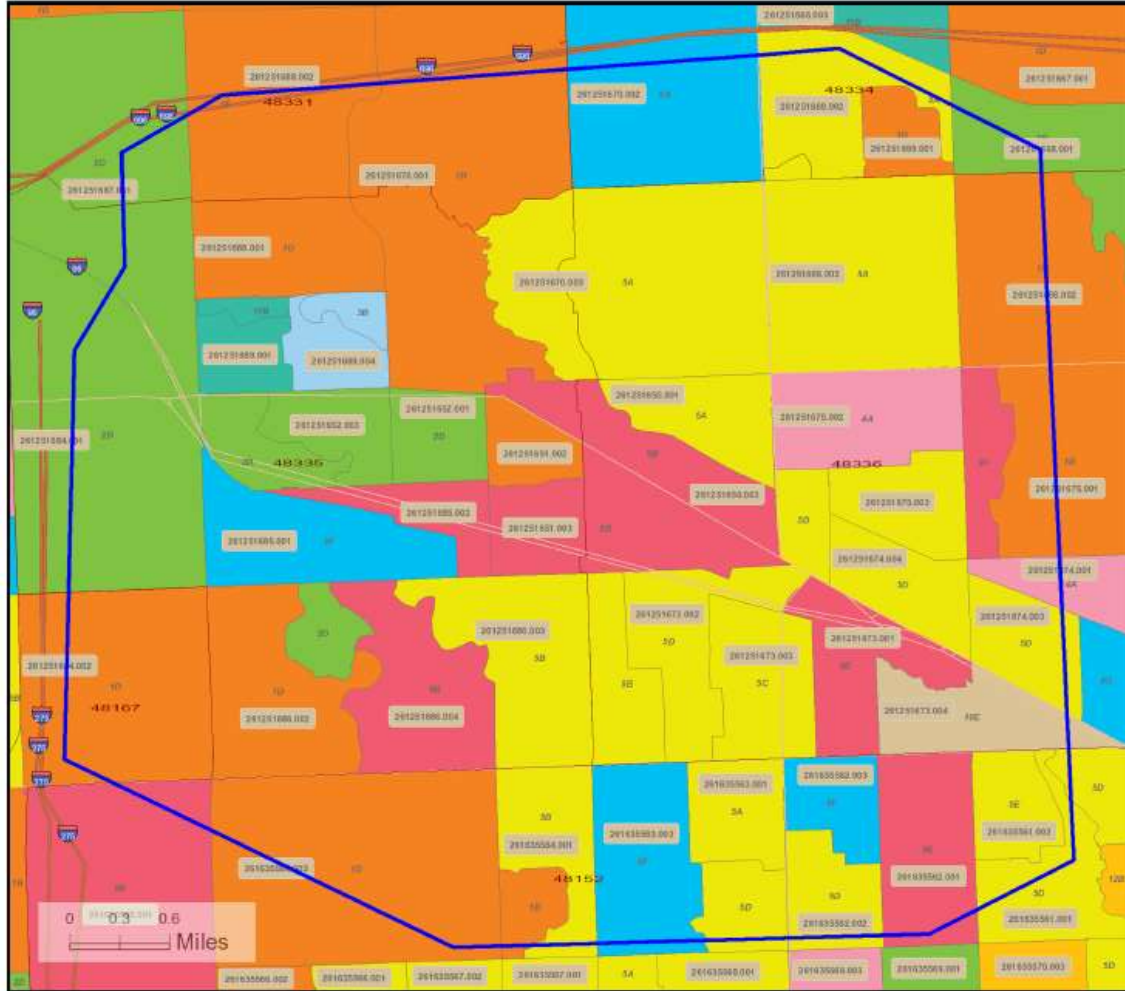


Appendix M1: Dominant Tapestry Map

Gibbs Planning Group

Dominant Tapestry Map

Farmington Hills Primary
Area: 21.69 square miles



Tapestry LifeMode

- L1: Affluent Estates
 - L2: Upscale Avenues
 - L3: Uptown Individuals
 - L4: Family Landscapes
 - L5: GenXurban
 - L6: Cozy Country
 - L7: Ethnic Enclaves
- L8: Middle Ground
 - L9: Senior Styles
 - L10: Rustic Outposts
 - L11: Midtown Singles
 - L12: Hometown
 - L13: Next Wave
 - L14: Scholars and Patriots



Source: Esri

Appendix M2: Dominant Tapestry Map - Segmentation

Gibbs Planning Group

Dominant Tapestry Map

Farmington Hills Primary
Area: 21.69 square miles

Tapestry Segmentation

Tapestry Segmentation represents the fifth generation of market segmentation systems that began 30 years ago. The 67-segment Tapestry Segmentation system classifies U.S. neighborhoods based on their socioeconomic and demographic composition. Each segment is identified by its two-digit Segment Code. Match the two-digit segment labels on the map to the list below. Click each segment below for a detailed description.

Segment 1A (Top Tier)	Segment 8C (Bright Young Professionals)
Segment 1B (Professional Pride)	Segment 8D (Downtown Melting Pot)
Segment 1C (Boomburbs)	Segment 8E (Front Porches)
Segment 1D (Savvy Suburbanites)	Segment 8F (Old and Newcomers)
Segment 1E (Exurbanites)	Segment 8G (Hardscrabble Road)
Segment 2A (Urban Chic)	Segment 9A (Silver & Gold)
Segment 2B (Pleasantville)	Segment 9B (Golden Years)
Segment 2C (Pacific Heights)	Segment 9C (The Elders)
Segment 2D (Enterprising Professionals)	Segment 9D (Senior Escapes)
Segment 3A (Laptops and Lattes)	Segment 9E (Retirement Communities)
Segment 3B (Metro Renters)	Segment 9F (Social Security Set)
Segment 3C (Trendsetters)	Segment 10A (Southern Satellites)
Segment 4A (Soccer Moms)	Segment 10B (Rooted Rural)
Segment 4B (Home Improvement)	Segment 10C (Diners & Miners)
Segment 4C (Middleburg)	Segment 10D (Down the Road)
Segment 5A (Comfortable Empty Nesters)	Segment 10E (Rural Bypasses)
Segment 5B (In Style)	Segment 11A (City Strivers)
Segment 5C (Parks and Rec)	Segment 11B (Young and Restless)
Segment 5D (Rustbelt Traditions)	Segment 11C (Metro Fusion)
Segment 5E (Midlife Constants)	Segment 11D (Set to Impress)
Segment 6A (Green Acres)	Segment 11E (City Commons)
Segment 6B (Salt of the Earth)	Segment 12A (Family Foundations)
Segment 6C (The Great Outdoors)	Segment 12B (Traditional Living)
Segment 6D (Prairie Living)	Segment 12C (Small Town Simplicity)
Segment 6E (Rural Resort Dwellers)	Segment 12D (Modest Income Homes)
Segment 6F (Heartland Communities)	Segment 13A (International Marketplace)
Segment 7A (Up and Coming Families)	Segment 13B (Las Casas)
Segment 7B (Urban Villages)	Segment 13C (NeWest Residents)
Segment 7C (American Dreamers)	Segment 13D (Fresh Ambitions)
Segment 7D (Barrios Urbanos)	Segment 13E (High Rise Renters)
Segment 7E (Valley Growers)	Segment 14A (Military Proximity)
Segment 7F (Southwestern Families)	Segment 14B (College Towns)
Segment 8A (City Lights)	Segment 14C (Dorms to Diplomas)
Segment 8B (Emerald City)	Segment 15 (Unclassified)

Source: Esri
