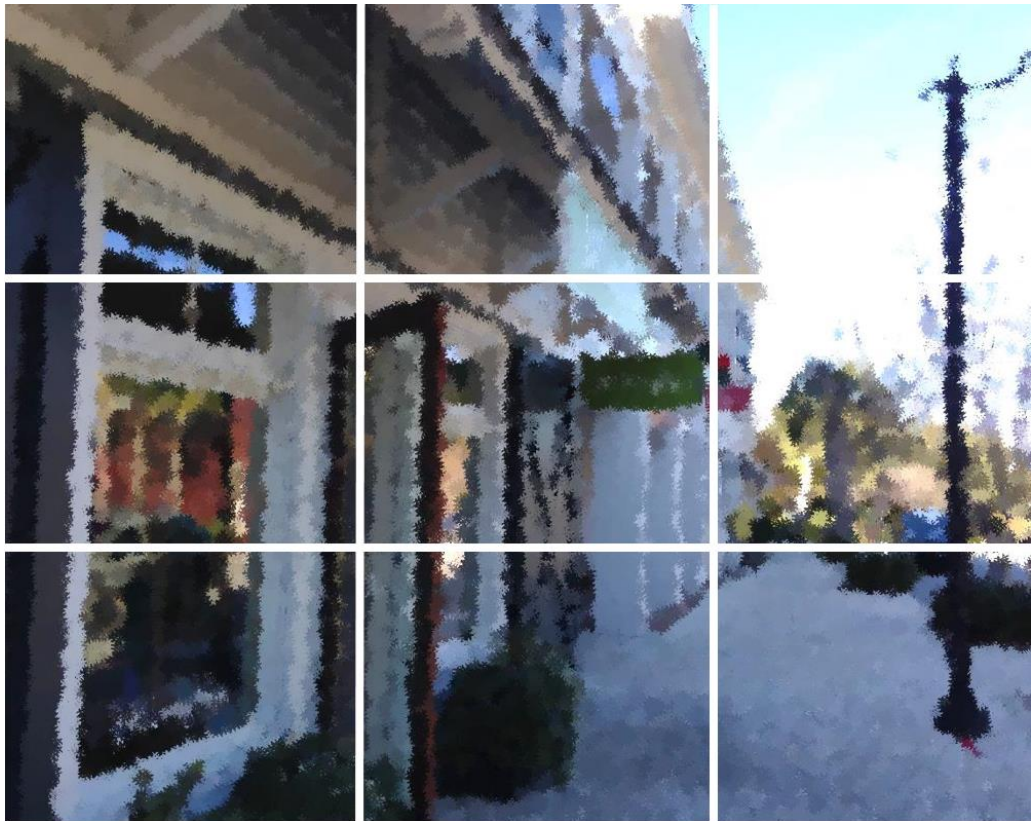


Downtown Ferndale  
**Retail Market Analysis**  
Ferndale, Michigan



*Prepared for:*  
City of Ferndale

*Prepared by:*  
Gibbs Planning Group

19 October 2015  
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## TABLE OF CONTENTS

INTRODUCTION .....	1
Executive Summary .....	1
Background .....	3
Methodology .....	4
Trade Area .....	5
Demographic Characteristics .....	8
Tapestry Lifestyles .....	9
Employment Base .....	13
TRADE AREA CHARACTERISTICS .....	15
Access .....	15
Other Shopping Areas .....	16
SUMMARY OF FINDINGS.....	20
2015-2020 Supportable Retail Table .....	20
Retail Category Definitions .....	21
Shopping Center Definitions .....	24
Limits of Study.....	24
APPENDIX .....	26

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## INTRODUCTION



*Figure 1: Aerial photo of Ferndale and surrounding areas. The primary trade area can presently support an additional 118,500 sf of retail and restaurant development.*

### Executive Summary

This study finds that downtown Ferndale can presently support up to 118,500 square feet (sf) of new retail and restaurant development, generating up to \$38.8 million in sales. By 2020, this new retail could likely produce up to \$42.9 million in gross sales. If constructed on a single site, the new development would be considered a small lifestyle type shopping center by industry definitions and could partially be absorbed by existing businesses and/or with the opening of 40 to 60 new restaurants and stores.

Downtown Ferndale can provide needed goods and services for the future and the existing consumer base of nearby residents, employees and visitors. The supportable retail includes 10-12 general merchandise stores, 7-10 apparel and shoe stores, 4-5 stores carrying department store merchandise and 5-10 restaurants. Although there is strong retail competition north of downtown Ferndale in Royal Oak and Troy, the dense neighborhood development of the inner ring suburbs and lack of regional shopping destinations within four miles translates to a robust retail market, with the potential to attract consumers who would rather shop closer to home or work.

Outside of downtown, there is demand for an additional 20,000 sf to 30,000 sf of neighborhood-serving retail space in the Innovation District bordering Hilton Road from 10 Mile to Lewiston. This well-traveled corridor serves as the entry to many residential streets on either side of the corridor, providing the visibility and traffic necessary to support retail. Additionally, non-motorized infrastructure along Hilton has the potential to expand the consumer base and support walkable clusters of retailers. Ideal retail for this corridor includes general merchandise, small-scale grocery, pharmacy, electronics, hardware and restaurants.

Close proximity to both Interstate 696 and Interstate 75 make Ferndale a convenient location for commuters and visitors to the Metro Detroit area. Easy exiting from the freeway makes stopping in Ferndale for shopping or dining simple and attractive to consumers. Combined with adequate parking and pedestrian friendly infrastructure, this could help downtown Ferndale compete with neighboring retail areas in Metro Detroit.

Downtown Ferndale currently has 66 restaurants and a variety of retailers along Woodward Avenue and 9 Mile Road. Retail variety is most heavily consumed by beauty services, with approximately 35 retailers that specialize in hair, nails or spa services. Ferndale also boasts 10 grocery and beverage stores and 4 pharmacies, which provide daily consumer items to the residents within the primary trade area.

**Table 1: 2015 Supportable Retail**

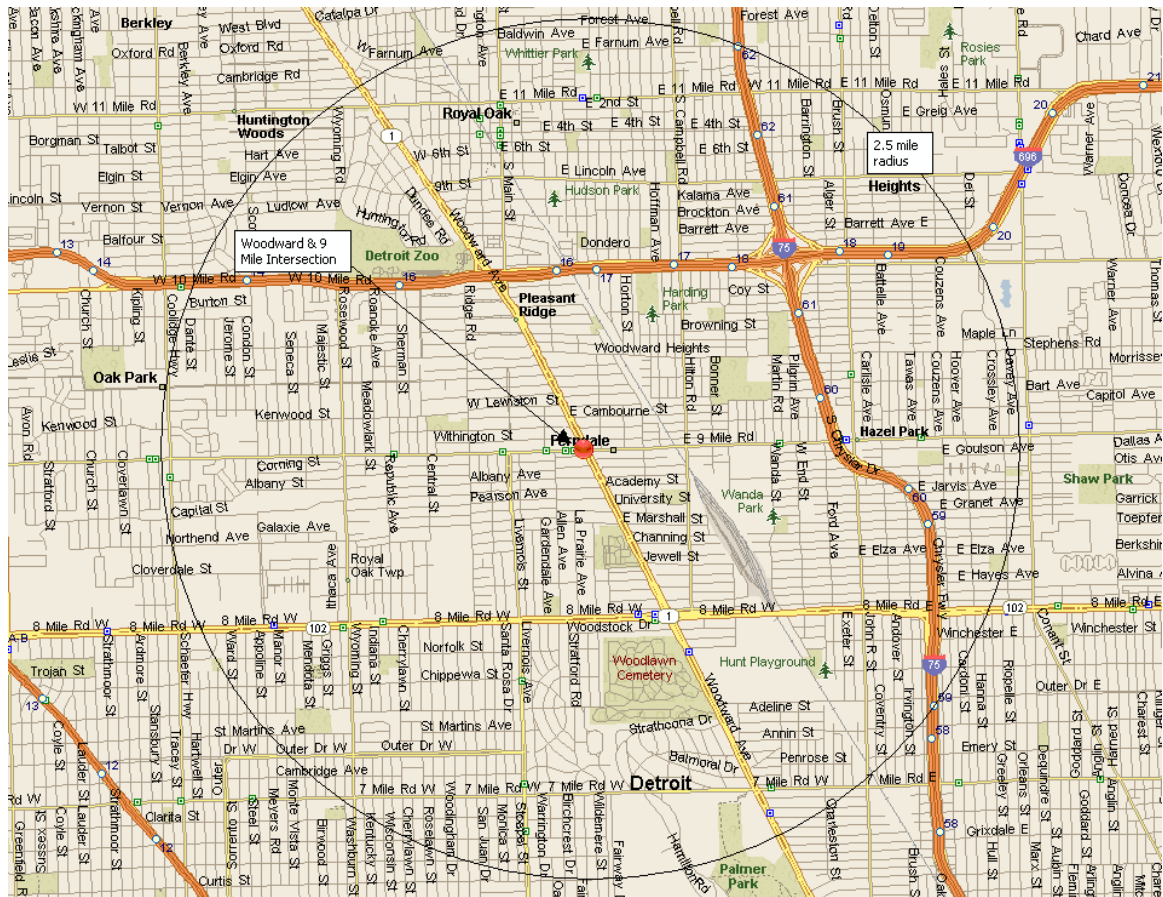
<i>Retail Category</i>	<i>2015 Estimated Supportable SF</i>	<i>2015 Estimated Retail Sales</i>	<i>No. of Stores</i>
<b>Retailers</b>			
Apparel & Shoe Stores	14,000 sf	\$4,055,300	7 - 10
Auto Parts Stores	1,500 sf	\$361,900	1
Book & Music Stores	600 sf	\$125,400	< 1
Department Store Merchandise	10,500 sf	\$3,478,200	4 - 5
Electronics & Appliance Stores	4,400 sf	\$1,550,500	2 - 3
Furniture & Home Furnishings Stores	3,400 sf	\$936,400	1
General Merchandise Stores	33,600 sf	\$10,742,400	10 - 12
Grocery Stores	5,100 sf	\$1,923,800	1
Hardware & Garden Supply Stores	6,400 sf	\$1,580,300	2 - 3
Jewelry Stores	1,700 sf	\$635,300	1 - 2
Miscellaneous Store Retailers	4,500 sf	\$1,223,800	2 - 3
Office Supplies & Gift Stores	3,000 sf	\$852,200	2 - 3
Pharmacy	7,800 sf	\$2,548,000	1 - 2
Sporting Goods & Hobby Stores	3,700 sf	\$1,012,000	1 - 2
<b>Retailer Totals</b>	<b>100,200 sf</b>	<b>\$31,025,500</b>	<b>35 - 50</b>
<b>Restaurants</b>			
Bars, Breweries & Pubs	4,000 sf	\$1,572,100	1 - 2
Full-Service Restaurants	8,200 sf	\$3,703,500	2 - 3
Limited-Service Eating Places	4,000 sf	\$1,695,800	1 - 3
Special Food Services	2,100 sf	\$776,300	1 - 2
<b>Restaurant Totals</b>	<b>18,300 sf</b>	<b>\$7,747,700</b>	<b>5 - 10</b>
<b>Retailer &amp; Restaurant Totals</b>	<b>118,500 sf</b>	<b>\$38,773,200</b>	<b>40 - 60</b>

**Table 1:** The Downtown Ferndale trade area can presently support 118,500 sf of additional retail and restaurant.

This study further finds that the Downtown Ferndale primary trade area includes 260,400 people and is expected to grow to 260,600 by 2020, at an annual rate of 0.01 percent. The current 2015 households number is 111,400, growing to 112,000 by 2020 at an annual rate of 0.11 percent.



Incomes in the primary trade area average \$59,300 annually, and are estimated to increase to \$68,000 by 2020. Moreover, 27.5 percent of the primary trade area's households earn above \$75,000 per year. The primary trade area's average household size of 2.32 persons is expected to remain roughly the same through 2020; the 2015 median age is 39.3 years old. Housing favors owner-occupied units, which comprise 54.3 percent of all housing, compared to 31.8 percent renter-occupied households. The primary trade area has a labor base of approximately 112,800 employees.



**Figure 2:** The cities surrounding downtown Ferndale include many established, densely developed neighborhoods, which means more spending potential within a close distance of the study area.

## Background

Gibbs Planning Group, Inc. (GPG) has been retained by the City of Ferndale to conduct a retail feasibility analysis for Downtown Ferndale.

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 for downtown Ferndale?
- What is the population, demographic and lifestyle characteristics in the primary trade area, currently and projected for 2020?

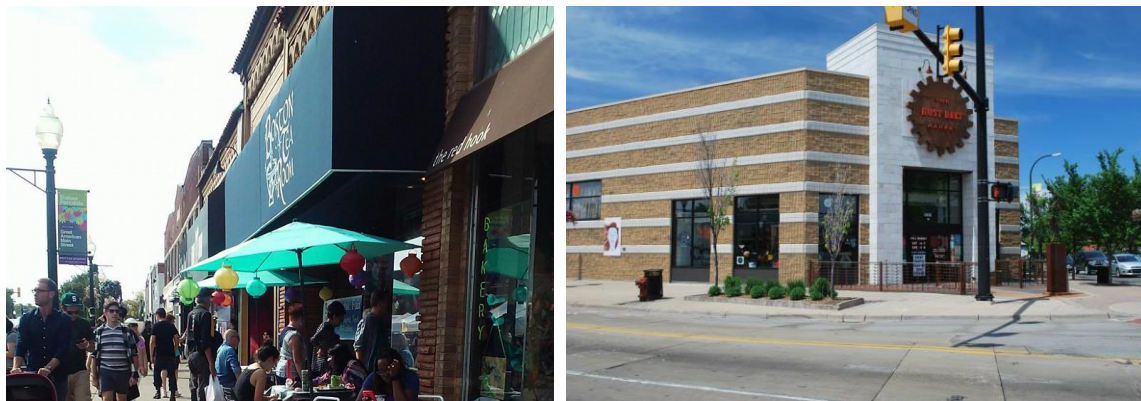
- What is the current and projected growth for retail expenditures in the primary trade area, now and for the next five years?
- How much additional retail square footage is supportable in the downtown Ferndale study area and what retail uses should be encouraged? What sales volumes can development achieve in or near the study area?

### 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 using census tracts from the U.S. Bureau of the Census, U.S. Bureau of Labor Statistics and Esri (Environmental Systems Research Institute).

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 Ferndale 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 3:** Downtown Ferndale is situated around the intersection of Woodward Avenue and 9 Mile Road with a collection of retail and restaurants.

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



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sales per sf in newly developed retail and selected increases in sales per sf by individual retail categories.

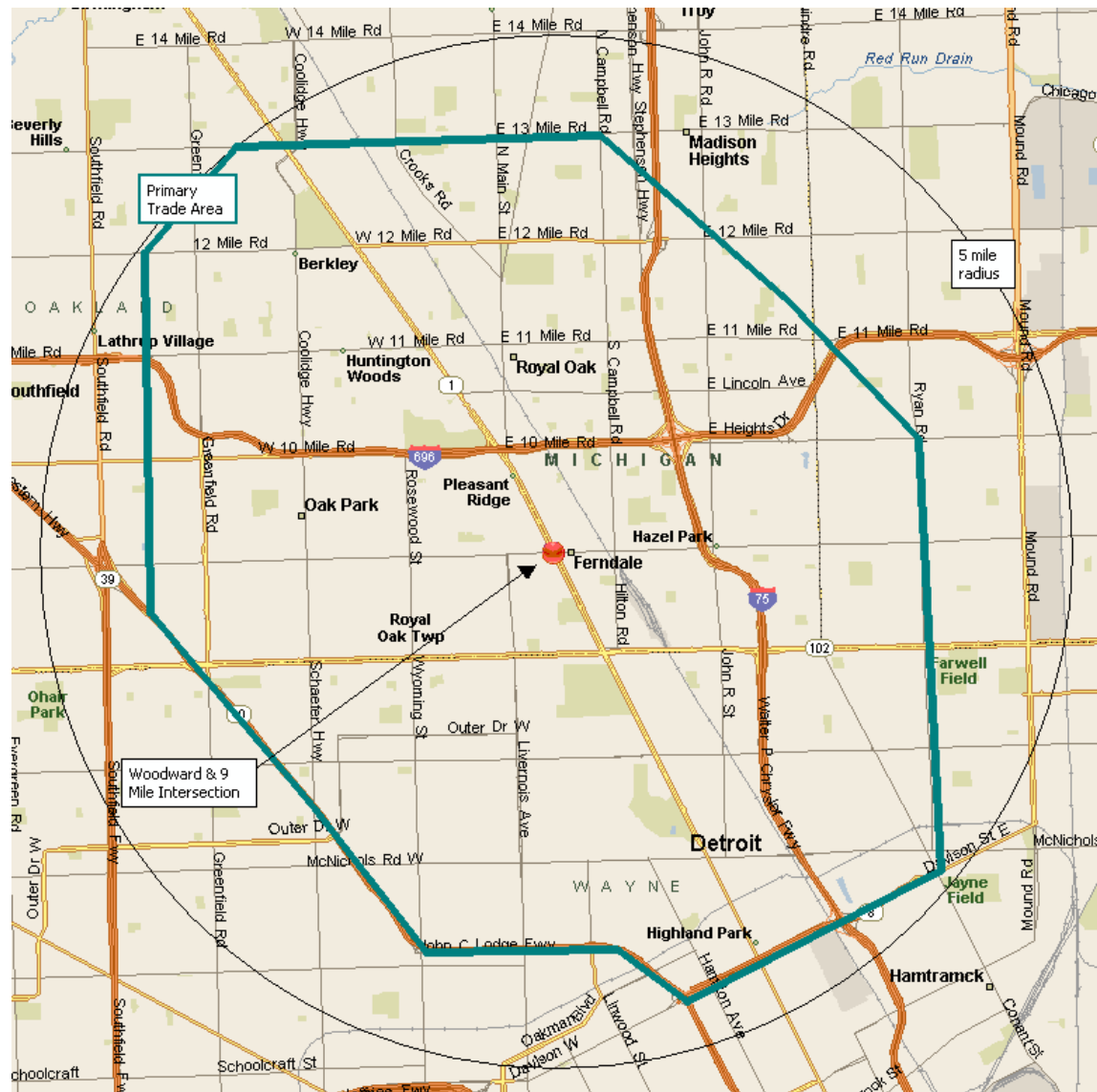
- No major regional retail centers will be developed within the trade area of this analysis through 2020 for the purposes of this study.
- The region's economy will continue at normal or above normal ranges of employment, inflation, retail demand and growth.
- The subject site is properly zoned to support 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 0.01 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.
- 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.
- Visibility of any new retail is also assumed very good, with signage as required to assure easy visibility of the retailers.
- Development 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**

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 0.01 percent and annual household income growth of 2.93 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 60 to 70 percent of the total sales captured by retailers in downtown Ferndale. Due to the strong retail gravitational pull of Troy, Warren, Southfield, Birmingham and downtown Detroit, GPG finds that downtown Ferndale has an approximate three to five-mile primary trade area, accounting for a predominantly residential area where access to the study area is convenient and opportunities to provide new retailers in a walkable setting are desired.

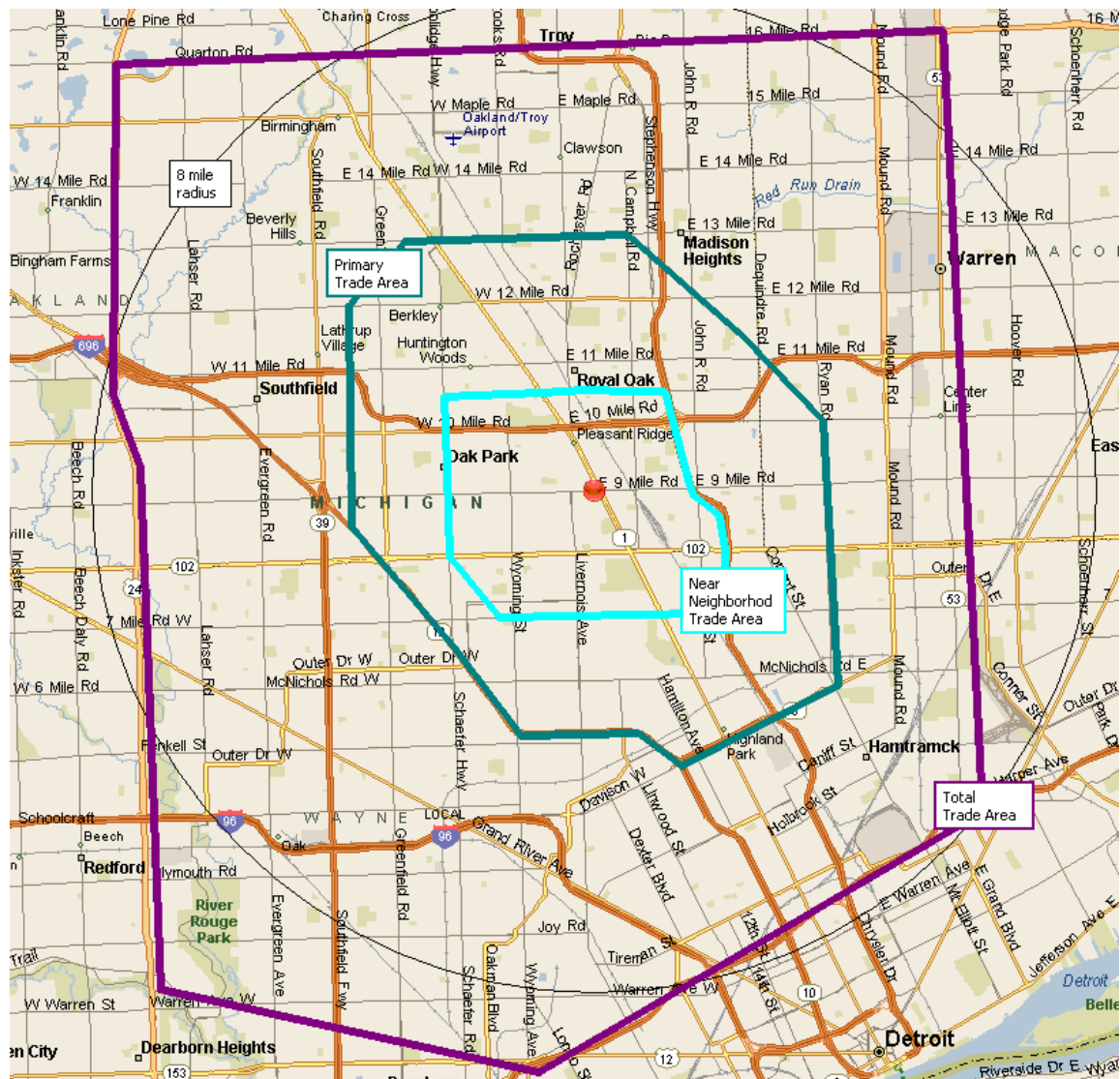


**Figure 4:** Ferndale's primary trade area map is show above in green. The primary trade area is comprised of many nearby cities with access from Interstate 696 and Interstate 75 and Woodward Avenue.

The following borders approximately delineate the primary trade area:

- North - 13 Mile Road
- South - Davison Freeway (M-8)
- East - Ryan Road
- West - Greenfield Road.

Furthermore, a near neighborhood trade area (Figure 5) was established to differentiate the characteristics of those living closest to the study area. These residents comprise nearly one-quarter of the primary trade area population, but due to their proximity are likely to visit the area regularly for a wider variety of goods and services including retailers supplying everyday needs such as a grocery store, hardware and pharmacy. This group of patrons primarily consists of Ferndale's core neighborhoods and other nearby residents within a five-minute drive of the study site. These residents may consider the study site to be their primary shopping destination and are the most likely customers to arrive by walking, biking or public transportation.



**Figure 5:** Downtown Ferndale's primary and total trade area map. The boundaries of the primary trade area are shown in blue, and the total trade is shown in purple. Consumers in the primary trade area account for 40 to 50 percent of the business generated in the study area.

Last, the total or community trade (Figure 5) area extends in all directions to include consumers who, because of convenient access and the lure of a walkable community, may currently or in the future generate expenditure for Downtown Ferndale retailers. The boundaries of the total trade area extend north to Big Beaver Road, east to Van Dyke Avenue, south to Interstate 94, and west

to Telegraph Road. Residents who live in the total, but not within the primary, trade area, will shop downtown Ferndale retailers frequently, but the area will not be their primary shopping location. Consumer expenditure by these residents will account for 20 to 30 percent of retail sales.

### 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 (2015), and those projected for 2020 for the defined trade areas, as well as statewide and national statistics.

**Table 2: Demographic Characteristics**

<i>Demographic Characteristic</i>	<i>Near Neighborhood Trade Area</i>	<i>Primary Trade Area</i>	<i>Total Trade Area</i>	<i>Michigan</i>
2015 Population	63,900	260,400	858,200	9,870,800
2020 Population	64,200	260,600	849,900	9,944,000
2015-2020 Annual Pop. Growth Rate	0.10%	0.01%	-0.19%	0.15%
2015 Households	28,200	111,400	343,000	3,902,600
2020 Households	28,400	112,000	341,200	3,943,200
2015-2020 Annual HH Growth Rate	0.19%	0.11%	-0.11%	0.21%
2015 Average Household Income	\$64,200	\$59,300	\$57,100	\$66,500
2015 Median Household Income	\$47,800	\$44,500	\$39,200	\$49,400
2020 Average Household Income	\$73,500	\$68,000	\$65,700	\$76,300
2020 Median Household Income	\$54,500	\$52,000	\$46,000	\$56,700
% Households w. incomes \$75,000+	29.1%	27.5%	24.9%	31.5%
% Bachelor's Degree	21.4%	18.9%	15.6%	16.7%
% Graduate or Professional Degree	15.0%	13.2%	11.0%	10.8%
Average Household Size	2.26	2.32	2.47	2.47
Median Age	38.7	39.3	38.3	39.9

**Table 2:** Key demographic characteristics of the study area's primary trade area, compared to the total trade area, Michigan and the U.S.

The primary trade area has an estimated 2015 population of 260,400 persons, which will increase at an annual rate of 0.01 percent to 260,600 by 2020. This annual growth rate is lower than the state's rate, but is a better outlook than the trend in the total trade area of -0.19 percent. The number of households in the primary trade area is 111,400, holding 2.32 persons per household, and is projected to increase to 112,000 by 2020, a 0.54 percent total increase over the five years. Median household income is \$44,500 and is expected to increase to \$52,000 by 2020. Average income in the primary trade area is \$59,300, while 27.5 percent of households earn over \$75,000 per year - higher than total trade area figure. Displaying higher levels of education than the state, 32.1 percent of residents over the age of 25 have earned a bachelor's degree or higher. The median age is less than the state at 39.3.

In the total trade area, there are 858,200 residents decreasing annually by -0.19 percent to 849,900 by 2020. This negative growth rate is not present in the primary trade area and state. The number of households is 343,000 decreasing to 341,200 by 2020. Median household income in the area is \$39,200 and the average household income is \$57,100, both of which are less than the primary trade area. Educational attainment is below the primary trade area figure with 26.6 percent of residents over the age of 25 having earned a bachelor's degree or higher. The average household size is 2.47 and the median age is 38.3.

Demographic figures from the near neighborhood trade area demonstrate improved demographic and economic characteristics. There are currently 63,900 residents in the near neighborhood trade area, increasing to 64,200 persons by 2020 at a rate of 0.10 percent annually. By 2020, the number of households will have grown to 28,400 from 28,200 in 2015 while the persons per household will have steadied at 2.26, suggesting there are more young households or single households nearest the study site. Median income in the near neighborhood trade area is the closest of the comparison geographies to the state at \$47,800 and will increase to \$54,500 by 2020. Similarly, average household income is expected to increase from \$64,200 to \$73,500 over the five year period. Displaying high levels of education, over 36 percent of adults above the age of 25 have earned a bachelor's degree or higher and 29.1 percent of households earn over \$75,000 annually. The median age is 38.7 years.

The primary trade area demonstrates a healthy and stable housing market. Approximately 86.1 percent of homes are occupied and the median home value is estimated to be \$116,900. Of all households, 54.3 percent are owner-occupied, a number that has decreased 2.5 percent since 2010; however, this proportion is expected to remain relatively stable through 2020. Renter-occupied households have increased from 30.9 percent in 2010 to 31.8 percent in 2015, and similar to owner-occupied households, this number is expected to remain consistent through 2020. The vacancy rate has increased from 12.3 percent in 2010 to 13.9 percent in 2015. It is expected to increase slightly further by 2020. The percentage of housing units valued at over \$300,000 is expected to increase from 3.9 percent to 6.7 percent - coinciding with an increase in the median home value to \$151,800 by 2020.



**Figure 6:** Several events and festivals held in Ferndale attract thousands of area resident to the city.



### **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><b>Family Foundations</b></p>	<p>Population 50,000</p> <p>Households 19,200</p> <p>Median HH Income <b>\$40,000</b></p> <p>17.2% Primary Trade Area Households Market Share</p> <p>1.1% National Market Share</p>	<p><i>Family Foundations</i> are established on family values and religious faith. Families can have older children at home who are working on financial independence as well as live-in grandparents. These consumers care about appearance and prefer shopping at discount stores such as T.J. Maxx and Marshalls.</p> <p>These are connected individuals that use the Internet primarily for chat rooms, online gaming, and entertainment. Urban format radio and magazines on health and child development are popular. Many have no financial investments or retirement savings. A majority of households have one to two vehicles at their disposal.</p>
  <p><b>Modest Income Homes</b></p>	<p>Population 47,900</p> <p>Households 19,000</p> <p>Median HH Income <b>\$22,000</b></p> <p>17.1% Primary Trade Area Households Market Share</p> <p>1.4% National Market Share</p>	<p>Residents in the <i>Modest Income Homes</i> segment base their lives on their religious faith and family values. These households could contain multiple generations as many individuals care for their elderly family members. Unemployment in this sector is more than double the US rate and many households require Social Security and public assistance income to help support the family. Most households rely on public transportation, but some may have one car.</p> <p>Consumers prefer television as their media of choice and they tend to purchase products that are endorsed by a celebrity. They are unlikely to possess a credit card, so all bills are paid in person. <i>Modest Income Homes</i> residents primarily shop at warehouse clubs and low-cost retailers to make ends meet.</p>
  <p><b>Emerald City</b></p>	<p>Population 32,600</p> <p>Households 16,300</p> <p>Median HH Income <b>\$52,000</b></p> <p>14.6% Primary Trade Area Household Market Share</p> <p>1.4% National Market Share</p>	<p><i>Emerald City</i> residents live in lower-density urban neighborhoods where they have the ability to rent opposed to own. These are well educated and well employed individuals who have a median age of 36.6 years. There are more singles and nonfamily types that fill these neighborhoods.</p> <p>The lifestyle reflects their interest in food and being green. Residents embrace the “foodie” culture by trying new foods and cooking with mostly organic ingredients. Trader Joes’ and Whole Foods are the grocery stores of choice for this group. <i>Emerald City</i> residents are technologically savvy and research new products prior to purchasing. Fitness is important and spare time is budgeted around the desire to exercise. They travel frequently whether it is for business or pleasure.</p>

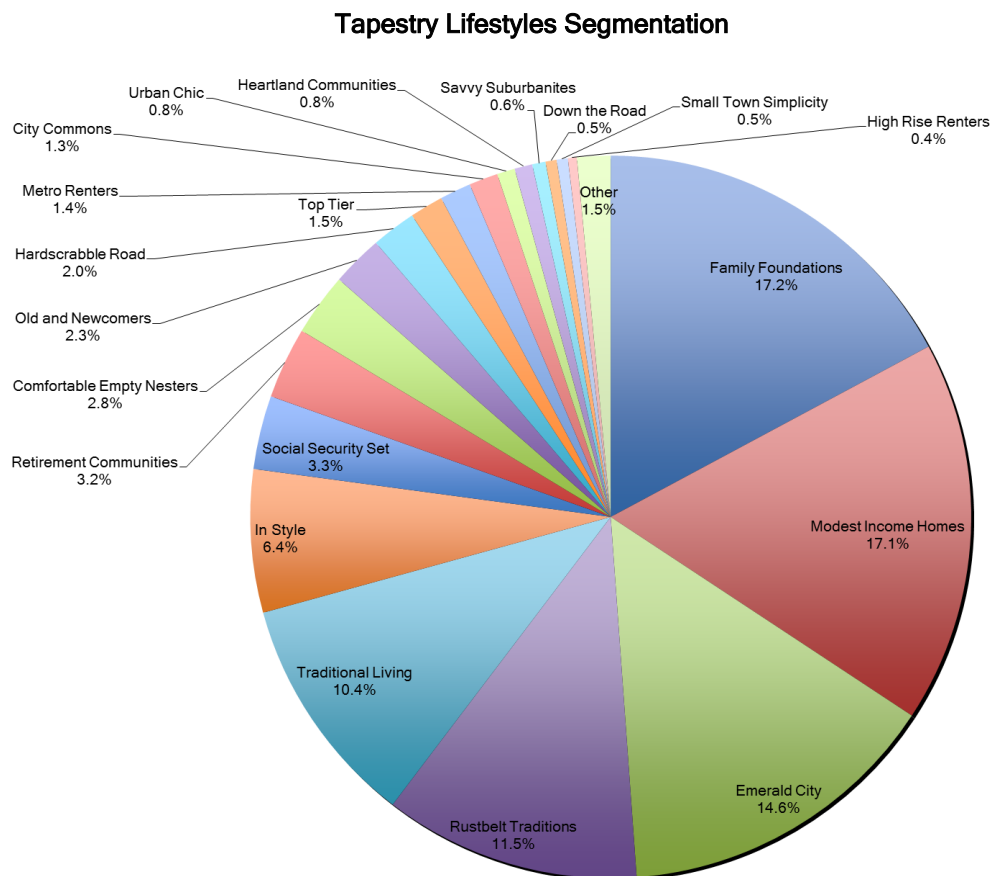
Lifestyle	Trade Area Statistics	Short Description
  <b>Rustbelt Traditions</b>	Population 30,100  Households 12,800  Median HH Income <b>\$49,000</b>  11.5% Primary Trade Area Households Market Share  2.2% National Households Market Share	<p><i>Rustbelt Traditions</i> are a mix of married-couple families and singles living in older single-family homes. Most individuals have lived, worked, and played in the same area for years. Many own their homes and enjoy spending time with the family in those homes. Households tend to possess two or more vehicles.</p> <p>These are budget aware consumers who prefer American-made products. They take advantage of convenience stores to fill up their cars and obtain incidental items. Eating out is a family tradition and known restaurants such as Applebee's, Outback Steakhouse, and Texas Roadhouse are preferred. Television and radio are enjoyed in the home.</p>
  <b>Traditional Living</b>	Population 28,200  Households 11,600  Median HH Income <b>\$37,000</b>  10.4% Primary Trade Area Households Market Share  2.0% National Households Market Share	<p>Residents in the <i>Traditional Living</i> segment live primarily in low-density, settled neighborhoods in the Midwest. The households are a mix of married-couple families and singles. Many families encompass two generations who have lived and worked in the community; their children are likely to follow suit. The manufacturing, retail trade, and health care sectors are the primary sources of employment for these residents. This is a younger market—beginning householders who are juggling the responsibilities of living on their own or a new marriage, while retaining their youthful interests in style and fun.</p> <p>They enjoy outdoor activities such as camping and taking trips to the zoo. They shop for groceries at discount stores such as Walmart supercenters; they're fast food devotees.</p>

**Table 3:** The top five Tapestry Lifestyle groups profiled above portray a mix of multi-generational and single-individual households with focuses on family, faith and food.

The trade area's most prominent lifestyle group is "*Family Foundations*," which represents 17.2 percent of households. More than half of these residents have attended college or obtained a degree, but one-third have only finished high school. Families include married couples, single parents, grandparents and children, both younger and older. The older children are working on obtaining financial independence. Many residents are employed in the government sector and health care industry. Style is important to this segment as well as having the latest smartphone.

*Family Foundations* live in established neighborhoods (most built before 1970) found in principal cities of major metropolitan areas. The average household size is 2.70. Housing preference favors owner-occupied (67 percent) single-family homes over renter-occupied (33 percent). The median home value is \$112,000. Median household income (\$40,000) and median net worth (\$53,000) fall below the U.S. averages.

With one-third of households only finishing high school, the unemployment rate is high (15 percent) and the labor force participation rate is slightly lower (60 percent) due to more individuals entering into retirement. *Family Foundations* are consumers that appreciate fine style and enjoy purchasing the latest fashion trends. Due to being financially restricted, they prefer to shop at discount retailers such as T.J. Maxx and Marshalls.



**Figure 7:** The relative proportions of the top Tapestry Lifestyle segments found in the primary trade area.

Residents possess one or two vehicles and may have slightly longer commutes to work. Many households have no financial investments or retirement savings, but a quarter do possess retirement accounts that they draw income from. One-third of households receive funds from Social Security benefits.

These consumers primarily spend money on baby and children's products to support their families. Additional money is spent on magazines that have a focus on child development and health. These financially conscious consumers shop at warehouse retailers such as Sam's Club.

The Internet is part of their life, but they primarily utilize it to participate in online gaming and chat rooms. They enjoy listening to urban format radio and watching television. Television is such an important part of their lives that they tend to own 3 - 4 televisions per household. Subscriptions to premium cable channels are also preferred.

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### Employment Base

The employment picture found in the primary trade area reflects a strong services and retail industry foundation, with elevated levels in *Manufacturing, Finance, Insurance and Real Estate (FIRE)*, and *Wholesale Trade*. These elevated industries are lower relative to the comparison geographies.

As shown in Table 4, the *Services* industry accounts for the majority of employment (52.2 percent) in the primary trade area and this is a higher proportion than the total trade area, state and national levels. Within the *Services* sector, *Health Services* are the leading subcategory comprising 24.2 percent of total employment, followed by *Other Services* (16.3 percent) and *Educational Institutions and Libraries* (6.4 percent).

**Table 4: Employment Comparison by Sector**

<i>Sector</i>	<i>Primary Trade Area</i>	<i>Total Trade Area</i>	<i>Michigan</i>	<i>USA</i>
Agriculture and Mining	1.6%	0.8%	1.5%	1.7%
Construction	3.8%	3.0%	4.0%	4.7%
Manufacturing	6.0%	12.0%	12.5%	8.2%
Transportation	1.4%	1.9%	2.6%	3.2%
Communication	1.0%	1.2%	0.7%	1.0%
Utility	0.4%	0.4%	0.6%	0.7%
Wholesale Trade	4.4%	6.3%	4.8%	4.6%
Retail Trade	20.9%	17.9%	21.3%	21.0%
Finance, Insurance & Real Estate	4.5%	10.0%	6.2%	6.8%
Services	52.2%	42.8%	39.9%	40.9%
Government	3.1%	2.9%	5.4%	6.5%
Other	0.9%	0.7%	0.6%	0.7%

**Table 4:** The *Services* industry in the primary trade area is markedly higher than the total trade area, Michigan and national levels.

*Retail* is the second leading sector of employment in the primary trade area and represents a larger share of total employment compared to the total trade area. Within the retail category, each subcategory is well represented; the leading subcategory is *Eating and Drinking Places*, comprising 8.7 percent of the total employment. Following eating and drinking places is *Miscellaneous Retail* (3.4 percent), *Food Stores* (2.4 percent), and *Auto Dealers, Gas Stations and Auto Aftermarket* (1.8 percent).

*Manufacturing, Finance, Insurance, & Real Estate (Fire)*, and *Wholesale Trade* follow *Services* and *Retail* sector employment representing 6.0 percent, 4.5 percent and 4.4 percent of total employment respectively. This may be due to the suburban nature of the trade area. Strong employment in these categories may suggest there are a number of good paying, middle-class jobs in the area.

**Table 5: Drive Time Employment by Industry Sector**

Employment Sector	5-Minute Drive time	10-Minute Drive time
Agriculture & Mining	160	1,590
Construction	700	3,550
Manufacturing	1,060	5,050
Transportation	120	1,190
Communication	60	980
Utility	210	320
Wholesale Trade	750	3,980
Retail Trade	3,830	19,430
Home Improvement	160	1,000
General Merchandise Stores	60	890
Food Stores	660	2,340
Auto Dealers, Gas Stations, Auto Aftermarket	390	1,810
Apparel & Accessory Stores	130	1,060
Furniture & Home Furnishings	190	1,070
Eating & Drinking Places	1,790	8,220
Miscellaneous Retail	460	3,040
Finance, Insurance, & Real Estate	1,000	3,980
Banks, Savings, & Lending Institutions	510	1,290
Securities Brokers	30	240
Insurance Carriers & Agents	100	700
Real Estate, Holding, Other Investment	360	1,750
Services	4,310	40,270
Hotels & Lodging	20	160
Automotive Services	310	1,910
Motion Pictures & Amusements	230	1,810
Health Services	830	14,570
Legal Services	330	1,200
Education Institutions & Libraries	580	5,570
Other Services	2,020	15,050
Government	440	2,920
Other	100	710
<b>Total Employment</b>	<b>12,740</b>	<b>83,970</b>

**Table 5:** Services and retail Trade are the largest categories across drive times and the primary trade area.

Daytime employment plays a large role in supporting retail. The primary trade area is estimated to have 106,200 employees, with nearly 84,000 employees within a 10-minute drive time from downtown Ferndale. The mix of employees throughout the 5- and 10-minute drive times still favors service employment represented by 4,310 and 40,270 employees, respectively. Furthermore, there are also 19,430 retail trade employees within a 10-minute drive of downtown Ferndale, representing another large share of employees nearby.



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 2015 dollars, is estimated at \$180. Weekly non-office worker expenditure, in 2015 dollars, is estimated at 37 percent of office workers. Non-office workers are estimated to have slightly less disposable income, to have multiple work locations including at home and typically are on the road more during their workweek. Retail purchases (general merchandise, apparel, home furnishings, electronics, grocery and convenience items) make up the majority of the office worker dollars, at \$120 per week. Restaurant expenditures (full service, limited service and drinking places) account for the balance at \$60 per week. Annualized, each office worker expends \$9,360 before, during and after work. Some of this potential expenditure can be captured within downtown Ferndale to supplement the demand generated by trade area households.

**Table 6: 10-Minute Drive Time Worker Expenditure**

Category	Weekly Expenditure	Annual Expenditure	Office Worker Expenditure	Non-Office Worker Expenditure	Total Expenditure
			31,240	52,730	
<b>Prepared Food &amp; Beverage</b>					
Limited & Full Service Restaurants	\$44	\$2,288	\$71,477,120	\$44,639,109	\$116,116,229
Drinking Places	\$16	\$832	\$25,991,680	\$16,232,403	\$42,224,083
<b>Retail Goods</b>					
General Merchandise, Apparel, Home Furnishings, Electronics	\$70	\$3,640	\$113,713,600	\$71,016,764	\$184,730,364
Grocery	\$30	\$1,560	\$48,734,400	\$30,435,756	\$79,170,156
Convenience Items	\$20	\$1,040	\$32,489,600	\$20,290,504	\$52,780,104
<b>Total</b>	<b>\$180</b>	<b>\$9,360</b>	<b>\$292,406,400</b>	<b>\$182,614,536</b>	<b>\$475,020,936</b>

**Table 6:** Employees within 10 minutes of the study site expend over \$475 million dollars annually.

The annual spending potential of 83,970 workers within a 10-minute drive time is \$158.3 million in prepared food and beverage establishments, \$184.7 million in retail goods sales, \$79.1 million in grocery purchases, and \$52.7 million in convenience items, totaling \$475.0 million in total worker expenditure before, during and after the workday. Detailed results are found above in Table 6.

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

## TRADE AREA CHARACTERISTICS

### Access

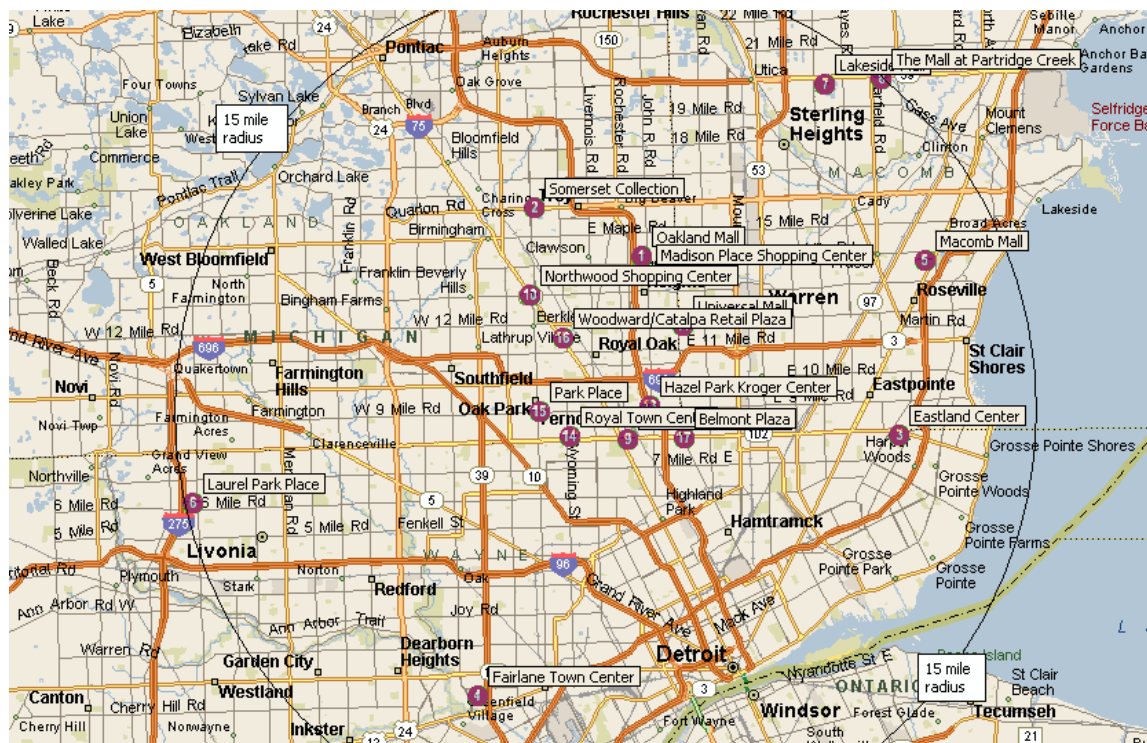
Regional linkage to the property is available: downtown Ferndale is situated one mile south of Interstate 696 and less than two miles west of Interstate 75. Local circulation to neighboring communities is accessible through Woodward Avenue, 9 Mile Road, and 8 Mile Road.

**Table 7: Traffic Counts**

Location	Traffic Count, AADT	Year
Woodward south of I-696	25,900	2009
8 Mile east of Woodward	25,200	2009
Woodward north of 9 Mile	24,300	2010
Woodward north of 8 Mile	18,200	2010
9 Mile west of Greenfield	9,300	2011
9 Mile west of I-75	7,100	2008

**Table 7:** The traffic chart shows heaviest traffic along Woodward Avenue and 8 Mile Road.

High traffic volumes seen in Table 7 depict the routes with the best regional access (Woodward Avenue and 8 Mile Road) and the highest concentration of activity. The heaviest volumes were all recorded along major thoroughfares to downtown Ferndale. However, the traffic volumes along Woodward south of Interstate 696 are less than those traveling to the north, indicating that there are fewer opportunities for exposure from passing motorists.



**Figure 8:** Location map of the area's existing shopping centers.

### Other Shopping Areas

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

**Table 8: Existing Shopping Centers**

Map Designation	Retail Center Name	Shopping Center Type	Size	Distance to Ferndale
1.	Oakland Mall	Regional Center	1,500,000 sf	7.0 miles
2.	Somerset Collection	Regional Center	1,450,000 sf	8.0 miles
3.	Eastland Center	Regional Center	1,416,000 sf	11.1 miles
4.	Fairlane Town Center	Regional Center	1,465,000 sf	14.6 miles
5.	Macomb Mall	Regional Center	933,000 sf	15.1 miles
6.	Laurel Park Place	Regional Center	507,000 sf	18.0 miles
7.	Lakeside Mall	Regional Center	1,550,000 sf	19.2 miles
8.	The Mall at Partridge Creek	Regional Center	889,000 sf	20.3 miles
9.	Gateway Marketplace	Community Center	325,000 sf	1.3 miles
10.	Northwood Shopping Center	Community Center	210,000 sf	5.1 miles
11.	Universal Mall	Community Center	600,000 sf	6.0 miles
12.	Madison Place Shopping Center	Community Center	422,000 sf*	7.6 miles
13.	Hazel Park Kroger Center	Neighborhood Center	99,000 sf	1.9 miles
14.	Royal Town Center	Neighborhood Center	112,000 sf	2.3 miles
15.	Park Place	Neighborhood Center	108,000 sf*	2.5 miles
16.	Woodward/Catalpa Retail Plaza	Neighborhood Center	58,000 sf*	2.8 miles
17.	Belmont Plaza	Neighborhood Center	150,000 sf	3.5 miles

**1. Oakland Mall**

Oakland Mall is conveniently located near Interstate 75, 7.0 miles north of Ferndale in Troy. With 1.5 million sf and anchor tenants such as Dick's Sporting Goods, JCPenney, Macy's and Sears. Oakland Mall attracts shoppers from around the Detroit Metro area. Urban Retail Properties is the current owner of this regional center. Originally opened in 1965, Oakland Mall has experienced renovations as recently as 2015 with the addition of Dick's Sporting Goods and H&M, a junior anchor.

**2. Somerset Collection**

Located 8.0 miles north of Ferndale in Troy, Somerset Collection is a 1.45 million sf regional center operated by the Forbes Company. Somerset Collection originally opened in 1969 with Somerset South, but it has since expanded across Big Beaver Road with Somerset North. The two are connected by a climate controlled SkyWalk that spans across Big Beaver Road. Somerset Collection is anchored by Macy's, Neiman Marcus, Nordstrom and Saks Fifth Avenue. Somerset South boasts a collection of high-end retailers such as Armani, Burberry, Gucci, Louis Vuitton and Versace.

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**3. Eastland Center**

Located 11.1 miles east of Ferndale in Harper Woods, Eastland Center is a 1.416 million sf regional center owned by Ashkenazy Acquisition Corporation. The center originally opened in 1957 and is currently anchored by Burlington Coat Factory, K&G Fashion Superstore, Macy's, Shoppers World and Target. Eastland Center has suffered financially recently and there are concerns that it could shutter just like Northland Center in Southfield did earlier in 2015. Ashkenazy Acquisition Corporation was also the owner of Northland Center before it closed.

**4. Fairlane Town Center**

Fairlane Town Center is located 14.6 miles southwest of Ferndale in Dearborn. The regional center boasts 1.465 million sf of leasable retail space and is anchored by JCPenney, Macy's and Sears. Fairlane Town Center also contains a variety of junior anchors such as Bally Total Fitness, DSW Shoe Warehouse, H&M and AMC Theatres. Starwood Capital Group is the current operator of the center.

**5. Macomb Mall**

Macomb Mall is located 15.1 miles east of Ferndale in Roseville. This regional center opened in 1964 and contains 933,000 sf of leasable retail space. Lormax Stern is the current operator of the center. Macomb Mall features anchor tenants such as Dick's Sporting Goods, Kohl's and Sears. H&M, Old Navy and Ulta are some of the other tenants featured at this center.

**6. Laurel Park Place**

Laurel Park Place is a smaller regional center with less than 507,000 sf anchored by Carson's and Von Maur. The center is located 18.0 miles west of Ferndale in Livonia. Originally opened in 1989, Laurel Park Place also contains a Marriott hotel, Phoenix Theater, and H&M as a junior anchor. CBL & Associates Properties is the current owner of the center.

**7. Lakeside Mall**

Located 19.2 miles northeast of Ferndale in Sterling Heights, Lakeside Mall is a regional center anchored by JCPenney, Lord & Taylor, Macy's, Macy's Men's & Home and Sears. The center boasts more than 1.55 million sf of retail space. Lakeside Mall originally opened in 1976 and continues to attract new retailers even as recently as 2015 with the addition of Jeepers!, an entertainment venue that is relocating from another regional center in the market. General Growth Properties is the current owner of Lakeside Mall.

**8. The Mall at Partridge Creek**

The Mall at Partridge Creek is located down Hall Road from Lakeside Mall, approximately 20.3 miles northeast of Ferndale in Clinton Township. This regional center contains 889,000 sf of retail space and is currently owned by Starwood Capital Group. The Mall at Partridge Creek opened in 2007 and is an open-air shopping center that attracts shoppers from around the area, especially those that enjoy walking their pet around the dog-friendly center. Carson's and Nordstrom anchor the center. The Mall at Partridge Creek also features a 14-screen MJR movie theater.

**9. Gateway Marketplace**

The closest community center to the Ferndale market is Gateway Marketplace, located 1.3 miles south of the main intersection in Ferndale. Gateway Marketplace in Detroit contains 325,000 sf of retail space and is owned by Detroit Gateway Park Outlet Mall LLC. Five Below, K&G Fashion Superstore, Marshall's, Meijer and Petco anchor the community center.

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**10. Northwood Shopping Center**

Located 5.1 miles north of Ferndale in Royal Oak, Northwood Shopping Center is a 210,000 sf community center owned by neighboring Beaumont Hospital. The center includes anchor tenants such as Dunham's Sports, Kroger, Office Depot, and Party City. Beaumont Hospital has been considering eliminating the community center for future expansions of the hospital.

**11. Universal Mall**

Universal Mall is a 600,000 sf community center located 6.0 miles northeast of Ferndale in Warren. The center was originally opened as an enclosed shopping center in 1965, but it was redeveloped in 2009 as a community center. Burlington Coat Factory, Cinemark, Marshalls, Petco and Target anchor the center. Universal Mall Properties is the current owner of the site.

**12. Madison Place Shopping Center**

Madison Place Shopping Center contains approximately 422,000 sf of retail space. The community center is located 7.6 miles north of Ferndale in Madison Heights. Big Lots, Dunham's Sports, JoAnn Fabrics, and Target anchor the center. Madison Place Shopping Center also contains 168 Asian Mart, the largest Asian supermarket in the Midwest.

**13. Hazel Park Kroger Center**

Hazel Park Kroger Center is located 1.9 miles east of Ferndale in Hazel Park. This neighborhood center is operated by Cohn Commercial Properties and contains 99,000 sf of leasable retail space. Kroger and Dollar Tree currently anchor the center.

**14. Royal Town Center**

Royal Town Center is a neighborhood center located 2.3 miles southwest of Ferndale in Royal Oak Township. The center contains 112,000 sf of leasable retail space and is currently operated by First Commercial Realty & Development Company. Kroger and Dollar Tree anchor the center.

**15. Park Place**

Located 2.5 miles west of Ferndale in Oak Park, Park Place offers approximately 108,000 sf of retail space. Keystone Commercial is the current operator of this neighborhood center. Family Dollar, Glory Supermarket, and Value World anchor the center.

**16. Woodward/Catalpa Retail Plaza**

This neighborhood center is located on the corner of Woodward and Catalpa. The center boasts more than 58,000 sf of leasable retail and contains notable tenants such as Petsmart, Trader Joe's and Ulta. The center has been undergoing renovations in 2015 and is located 2.8 miles north of Ferndale in Royal Oak.

**17. Belmont Plaza**

Located 3.5 miles southeast of Ferndale in Detroit, Belmont Plaza is a neighborhood center owned by Petzold Enterprises. Belmont Plaza was originally built in 1958 and has been updated as recently as 1999. The center contains 150,000 sf of leasable retail space and is anchored by Imperial Supermarket and Dollar Tree.



## SUMMARY of FINDINGS

This study finds that downtown Ferndale can presently support up to 118,500 sf of additional retail space. This new retail can potentially capture an additional \$38.7 million of expenditures in 2015, growing to \$42.9 million by 2020.

**Table 9: Supportable Retail Table**

Retail Category	Estimated Supportable SF	2015 Sales/SF	2015 Estimated Retail Sales	2020 Sales/SF	2020 Estimated Retail Sales	No. of Stores
<b>Retailers</b>						
Apparel Stores	12,000	\$290	\$3,480,000	\$315	\$3,780,000	6 - 8
Auto Parts Stores	1,540	\$235	\$361,900	\$255	\$392,700	1
Book & Music Stores	570	\$220	\$125,400	\$240	\$136,800	< 1
Department Store Merchandise	10,540	\$330	\$3,478,200	\$360	\$3,794,400	4 - 5
Electronics & Appliance Stores	4,430	\$350	\$1,550,500	\$385	\$1,705,550	2 - 3
Furniture Stores	820	\$270	\$221,400	\$295	\$241,900	< 1
General Merchandise Stores	33,570	\$320	\$10,742,400	\$350	\$11,749,500	10 - 12
Grocery Stores	5,130	\$375	\$1,923,750	\$410	\$2,103,300	1
Hardware	5,340	\$250	\$1,335,000	\$375	\$2,002,500	1 - 2
Home Furnishings Stores	2,600	\$275	\$715,000	\$300	\$780,000	1
Jewelry Stores	1,650	\$385	\$635,250	\$420	\$693,000	1 - 2
Lawn & Garden Supply Stores	1,090	\$225	\$245,250	\$245	\$267,050	1
Miscellaneous Store Retailers	4,450	\$275	\$1,223,750	\$300	\$1,335,000	2 - 3
Office Supplies & Gift Stores	2,990	\$285	\$852,150	\$310	\$926,900	2 - 3
Pharmacy	7,840	\$325	\$2,548,000	\$355	\$2,783,200	1 - 2
Shoe Stores	1,950	\$295	\$575,250	\$325	\$633,750	1 - 2
Sporting Goods & Hobby Stores	3,680	\$275	\$1,012,000	\$300	\$1,104,000	1 - 2
<b>Retailer Totals</b>	<b>100,190</b>	<b>\$293</b>	<b>\$31,025,200</b>	<b>\$326</b>	<b>\$34,429,550</b>	<b>35 - 50</b>
<b>Restaurants</b>						
Bars, Breweries & Pubs	3,980	\$395	\$1,572,100	\$430	\$1,711,400	1 - 2
Full-Service Restaurants	8,230	\$450	\$3,703,500	\$495	\$4,073,850	2 - 3
Limited-Service Eating Places	3,990	\$425	\$1,695,750	\$465	\$1,855,350	1 - 3
Special Food Services	2,070	\$375	\$776,250	\$410	\$848,700	1 - 2
<b>Restaurant Totals</b>	<b>18,270</b>	<b>\$411</b>	<b>\$7,747,600</b>	<b>\$450</b>	<b>\$8,489,300</b>	<b>5 - 10</b>
<b>Retailer &amp; Restaurant Totals</b>	<b>118,460</b>	<b>\$315</b>	<b>\$38,772,800</b>	<b>\$350</b>	<b>\$42,918,850</b>	<b>40 - 60</b>

**Table 9.** Sales stated in constant 2015 dollars.

The demographics of the primary trade area show a population base of 260,400, which will grow to 260,600 by 2020, at an annual growth rate of 0.01 percent. The persons-per-household is 2.32, and median age is 39.3 years old. Average household incomes of \$59,300 in the primary trade area are slightly lower than the state and national averages. The median household income of \$44,500 is also slightly lower than the state and national levels.

Employment in the primary trade area favors the *Services* sector (52.2 percent), while being weak in the *Communication* and *Utility* categories. There are over 83,900 employees within a 10-minute drive of the study site, 48 percent of which are concentrated in the service sector. These daytime

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consumers expend over \$374.4 million annually, with the general retail sector leading at \$145.6 million per year.

Tapestry lifestyles in the market reflect a majority base of *Family Foundations* households, representing 17.2 percent of all households. This group is comprised of families that can have older children at home who are working on financial independence as well as live-in grandparents. Focused on faith and family values, these households own one or two vehicles, have little to no financial investments, and pride themselves on their appearance. Their median household income is \$40,000, with an average household size of 2.70.

### **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 U.S. Census Bureau provides the following NAICS codes and definitions:

#### **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).

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**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

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

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

### **Shopping Center Definitions**

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

- **Convenience Centers:** Convenience centers are 30,000 sf or less, unanchored, and generally will service a trade area of up to one mile. These centers include banking, carryout foods, florists, mail centers, small restaurants, small food markets, and professional services such as real estate and financial consulting. The centers typically include six to eight businesses.
- **Neighborhood Centers:** Neighborhood centers are anchored with a full-sized supermarket and typically range from 60,000 to 100,000 sf. They service a trade area of two to three miles and can include apparel, banks, carryout food, hardware, mail centers, restaurants, sporting goods and professional services such as financial consulting and real estate.
- **Community Centers:** Community centers typically range from 150,000 to 300,000 sf and are almost always anchored with a full-sized department store. They also include junior anchor retailers selling books, crafts, shoes, and sporting goods. Community centers often include large home improvement stores and medium-sized discount apparel stores. Their service area is typically five to seven miles in suburban locations.
- **Lifestyle Centers:** Lifestyle centers average 150,000 to 200,000 sf and feature popular apparel, book, and home furnishing stores, as well as cinemas and a wide selection of themed restaurants. The centers are frequently planned as walkable areas with main streets. Recently, lifestyle centers have included large anchors such as department stores, public libraries, and supermarkets. These centers typically have a trade area of four to six miles when developed in suburban settings. Lifestyle centers that include civic, employment, and residential buildings along with the retail land use are defined as 'town centers.'
- **Regional Centers:** Regional centers average trade areas of eight to 12 miles and are anchored with multiple department stores. The centers can range from 800,000 to 1,500,000 sf, and often include cinemas along with 200,000 sf of national brand fashion.

### **Limits of Study**

The findings of this study represent GPG's best estimates for the amounts and types of 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



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objective third party research and GPG does not necessarily 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 October 19, 2015 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 the client for general planning purposes only, and is void for other site locations or developers.

- *End of Study* -

Ferndale PTA  
Area: 50.82 square miles

Prepared by Esri  
Latitude: 42.46149054  
Longitude: -83.1366491

Data for all businesses in area					
Total Businesses:					10,718
Total Employees:					106,246
Total Residential Population:					260,376
Employee/Residential Population Ratio:					0.41:1
by SIC Codes	Number	Percent	Number	Percent	Employees
Agriculture & Mining	159	1.5%	1,694	1.6%	1.6%
Construction	664	6.2%	4,020	3.8%	3.8%
Manufacturing	446	4.2%	6,369	6.0%	6.0%
Transportation	178	1.7%	1,513	1.4%	1.4%
Communication	106	1.0%	1,023	1.0%	1.0%
Utility	29	0.3%	401	0.4%	0.4%
Wholesale Trade	459	4.3%	4,632	4.4%	4.4%
Retail Trade Summary	2,507	23.4%	22,157	20.9%	20.9%
Home Improvement	131	1.2%	1,197	1.1%	1.1%
General Merchandise Stores	84	0.8%	1,282	1.2%	1.2%
Food Stores	207	1.9%	2,517	2.4%	2.4%
Auto Dealers, Gas Stations, Auto Aftermarket	274	2.6%	1,912	1.8%	1.8%
Apparel & Accessory Stores	271	2.5%	1,105	1.0%	1.0%
Furniture & Home Furnishings	175	1.6%	1,272	1.2%	1.2%
Eating & Drinking Places	629	5.9%	9,290	8.7%	8.7%
Miscellaneous Retail	737	6.9%	3,582	3.4%	3.4%
Finance, Insurance, Real Estate Summary	952	8.9%	4,796	4.5%	4.5%
Banks, Savings & Lending Institutions	372	3.5%	1,839	1.7%	1.7%
Securities Brokers	69	0.6%	245	0.2%	0.2%
Insurance Carriers & Agents	156	1.5%	832	0.8%	0.8%
Real Estate, Holding, Other Investment Offices	355	3.3%	1,880	1.8%	1.8%
Services Summary	4,653	43.4%	55,488	52.2%	52.2%
Hotels & Lodging	37	0.3%	167	0.2%	0.2%
Automotive Services	414	3.9%	2,096	2.0%	2.0%
Motion Pictures & Amusements	242	2.3%	2,098	2.0%	2.0%
Health Services	686	6.4%	25,689	24.2%	24.2%
Legal Services	184	1.7%	1,248	1.2%	1.2%
Education Institutions & Libraries	223	2.1%	6,822	6.4%	6.4%
Other Services	2,865	26.7%	17,368	16.3%	16.3%
Government	193	1.8%	3,242	3.1%	3.1%
Unclassified Establishments	371	3.5%	912	0.9%	0.9%
Totals	10,718	100.0%	106,246	100.0%	100.0%

Source: Copyright 2015 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2015.

## Gibbs Planning Group

## Business Summary

Ferndale PTA  
Area: 50.82 square miles

Prepared by Esri  
Latitude: 42.46149054  
Longitude: -83.1366491

by NAICS Codes	Businesses		Employees	
	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	10	0.1%	45	0.0%
Mining	2	0.0%	5	0.0%
Utilities	11	0.1%	256	0.2%
Construction	721	6.7%	4,271	4.0%
Manufacturing	478	4.5%	6,382	6.0%
Wholesale Trade	421	3.9%	4,324	4.1%
Retail Trade	1,814	16.9%	12,394	11.7%
Motor Vehicle & Parts Dealers	164	1.5%	1,479	1.4%
Furniture & Home Furnishings Stores	62	0.6%	495	0.5%
Electronics & Appliance Stores	91	0.8%	679	0.6%
Bldg Material & Garden Equipment & Supplies Dealers	130	1.2%	1,196	1.1%
Food & Beverage Stores	214	2.0%	2,317	2.2%
Health & Personal Care Stores	178	1.7%	1,418	1.3%
Gasoline Stations	111	1.0%	432	0.4%
Clothing & Clothing Accessories Stores	365	3.4%	1,346	1.3%
Sport Goods, Hobby, Book, & Music Stores	102	1.0%	479	0.5%
General Merchandise Stores	84	0.8%	1,282	1.2%
Miscellaneous Store Retailers	276	2.6%	1,053	1.0%
Nonstore Retailers	39	0.4%	218	0.2%
Transportation & Warehousing	158	1.5%	1,450	1.4%
Information	247	2.3%	2,095	2.0%
Finance & Insurance	606	5.7%	2,951	2.8%
Central Bank/Credit Intermediation & Related Activities	376	3.5%	1,509	1.4%
Securities, Commodity Contracts & Other Financial	72	0.7%	602	0.6%
Insurance Carriers & Related Activities; Funds, Trusts &	158	1.5%	840	0.8%
Real Estate, Rental & Leasing	443	4.1%	2,544	2.4%
Professional, Scientific & Tech Services	1,080	10.1%	7,141	6.7%
Legal Services	198	1.8%	1,327	1.2%
Management of Companies & Enterprises	4	0.0%	8	0.0%
Administrative & Support & Waste Management & Remediation	452	4.2%	3,839	3.6%
Educational Services	259	2.4%	6,793	6.4%
Health Care & Social Assistance	963	9.0%	28,612	26.9%
Arts, Entertainment & Recreation	160	1.5%	1,674	1.6%
Accommodation & Food Services	686	6.4%	9,712	9.1%
Accommodation	37	0.3%	167	0.2%
Food Services & Drinking Places	649	6.1%	9,545	9.0%
Other Services (except Public Administration)	1,612	15.0%	7,291	6.9%
Automotive Repair & Maintenance	349	3.3%	1,449	1.4%
Public Administration	197	1.8%	3,310	3.1%
Unclassified Establishments	392	3.7%	1,148	1.1%
Total	10,718	100.0%	106,246	100.0%

Source: Copyright 2015 Infogroup, Inc. All rights reserved. Esri Total Residential Population forecasts for 2015.

## EXHIBIT B-1: Community Profile - Primary Trade Area

Gibbs Planning Group

### Community Profile

Ferndale PTA  
Area: 50.82 square miles

Prepared by Esri  
Latitude: 42.46149054  
Longitude: -83.1366491

<b>Population Summary</b>	
2000 Total Population	308,513
2010 Total Population	265,566
2015 Total Population	260,376
2015 Group Quarters	2,388
2020 Total Population	260,565
2015-2020 Annual Rate	0.01%
<b>Household Summary</b>	
2000 Households	124,167
2000 Average Household Size	2.46
2010 Households	112,214
2010 Average Household Size	2.34
2015 Households	111,418
2015 Average Household Size	2.32
2020 Households	112,039
2020 Average Household Size	2.30
2015-2020 Annual Rate	0.11%
2010 Families	64,766
2010 Average Family Size	3.08
2015 Families	63,120
2015 Average Family Size	3.06
2020 Families	62,747
2020 Average Family Size	3.05
2015-2020 Annual Rate	-0.12%
<b>Housing Unit Summary</b>	
2000 Housing Units	130,766
Owner Occupied Housing Units	65.3%
Renter Occupied Housing Units	29.7%
Vacant Housing Units	5.0%
2010 Housing Units	127,974
Owner Occupied Housing Units	56.8%
Renter Occupied Housing Units	30.9%
Vacant Housing Units	12.3%
2015 Housing Units	129,340
Owner Occupied Housing Units	54.3%
Renter Occupied Housing Units	31.8%
Vacant Housing Units	13.9%
2020 Housing Units	130,664
Owner Occupied Housing Units	54.0%
Renter Occupied Housing Units	31.8%
Vacant Housing Units	14.3%
<b>Median Household Income</b>	
2015	\$44,485
2020	\$51,941
<b>Median Home Value</b>	
2015	\$116,902
2020	\$151,761
<b>Per Capita Income</b>	
2015	\$25,515
2020	\$29,374
<b>Median Age</b>	
2010	38.0
2015	39.3
2020	40.2

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

**Source:** U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

## EXHIBIT B-2: Community Profile - Primary Trade Area

Gibbs Planning Group

### Community Profile

Ferndale PTA  
Area: 50.82 square miles

Prepared by Esri  
Latitude: 42.46149054  
Longitude: -83.1366491

<b>2015 Households by Income</b>	
Household Income Base	111,418
<\$15,000	17.9%
\$15,000 - \$24,999	11.1%
\$25,000 - \$34,999	10.8%
\$35,000 - \$49,999	14.6%
\$50,000 - \$74,999	18.2%
\$75,000 - \$99,999	11.7%
\$100,000 - \$149,999	10.5%
\$150,000 - \$199,999	3.1%
\$200,000+	2.2%
Average Household Income	\$59,337
<b>2020 Households by Income</b>	
Household Income Base	112,039
<\$15,000	16.7%
\$15,000 - \$24,999	8.4%
\$25,000 - \$34,999	9.3%
\$35,000 - \$49,999	13.6%
\$50,000 - \$74,999	18.3%
\$75,000 - \$99,999	13.6%
\$100,000 - \$149,999	13.7%
\$150,000 - \$199,999	3.8%
\$200,000+	2.5%
Average Household Income	\$68,012
<b>2015 Owner Occupied Housing Units by Value</b>	
Total	70,254
<\$50,000	9.4%
\$50,000 - \$99,999	31.8%
\$100,000 - \$149,999	26.0%
\$150,000 - \$199,999	18.2%
\$200,000 - \$249,999	6.9%
\$250,000 - \$299,999	3.7%
\$300,000 - \$399,999	2.6%
\$400,000 - \$499,999	0.8%
\$500,000 - \$749,999	0.5%
\$750,000 - \$999,999	0.0%
\$1,000,000 +	0.0%
Average Home Value	\$132,790
<b>2020 Owner Occupied Housing Units by Value</b>	
Total	70,495
<\$50,000	6.6%
\$50,000 - \$99,999	21.6%
\$100,000 - \$149,999	20.9%
\$150,000 - \$199,999	25.8%
\$200,000 - \$249,999	12.1%
\$250,000 - \$299,999	6.2%
\$300,000 - \$399,999	3.8%
\$400,000 - \$499,999	1.5%
\$500,000 - \$749,999	1.0%
\$750,000 - \$999,999	0.4%
\$1,000,000 +	0.0%
Average Home Value	\$163,662

**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 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

## EXHIBIT B-3: Community Profile - Primary Trade Area

Gibbs Planning Group

### Community Profile

Ferndale PTA  
Area: 50.82 square miles

Prepared by Esri  
Latitude: 42.46149054  
Longitude: -83.1366491

<b>2010 Population by Age</b>	
Total	265,566
0 - 4	6.1%
5 - 9	5.8%
10 - 14	6.1%
15 - 24	13.3%
25 - 34	14.5%
35 - 44	14.1%
45 - 54	14.4%
55 - 64	12.0%
65 - 74	6.7%
75 - 84	4.8%
85 +	2.1%
18 +	77.8%
<b>2015 Population by Age</b>	
Total	260,377
0 - 4	5.8%
5 - 9	5.9%
10 - 14	5.7%
15 - 24	12.7%
25 - 34	13.9%
35 - 44	13.7%
45 - 54	13.7%
55 - 64	13.4%
65 - 74	8.5%
75 - 84	4.4%
85 +	2.2%
18 +	79.1%
<b>2020 Population by Age</b>	
Total	260,566
0 - 4	5.7%
5 - 9	5.7%
10 - 14	5.9%
15 - 24	11.5%
25 - 34	14.1%
35 - 44	13.3%
45 - 54	13.3%
55 - 64	13.3%
65 - 74	10.1%
75 - 84	4.9%
85 +	2.2%
18 +	79.3%
<b>2010 Population by Sex</b>	
Males	125,589
Females	139,977
<b>2015 Population by Sex</b>	
Males	123,552
Females	136,823
<b>2020 Population by Sex</b>	
Males	124,373
Females	136,192

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.



## EXHIBIT B-4: Community Profile - Primary Trade Area

Gibbs Planning Group

### Community Profile

Ferndale PTA  
Area: 50.82 square miles

Prepared by Esri  
Latitude: 42.46149054  
Longitude: -83.1366491

2010 Population by Race/Ethnicity	
Total	265,566
White Alone	48.9%
Black Alone	46.5%
American Indian Alone	0.3%
Asian Alone	1.5%
Pacific Islander Alone	0.0%
Some Other Race Alone	0.4%
Two or More Races	2.3%
Hispanic Origin	1.7%
Diversity Index	56.0
2015 Population by Race/Ethnicity	
Total	260,376
White Alone	48.5%
Black Alone	46.2%
American Indian Alone	0.3%
Asian Alone	1.8%
Pacific Islander Alone	0.0%
Some Other Race Alone	0.4%
Two or More Races	2.7%
Hispanic Origin	2.0%
Diversity Index	56.9
2020 Population by Race/Ethnicity	
Total	260,565
White Alone	47.7%
Black Alone	46.2%
American Indian Alone	0.3%
Asian Alone	2.1%
Pacific Islander Alone	0.0%
Some Other Race Alone	0.5%
Two or More Races	3.0%
Hispanic Origin	2.3%
Diversity Index	57.8
2010 Population by Relationship and Household Type	
Total	265,566
In Households	99.1%
In Family Households	77.5%
Householder	24.4%
Spouse	13.6%
Child	32.4%
Other relative	4.6%
Nonrelative	2.4%
In Nonfamily Households	21.6%
In Group Quarters	0.9%
Institutionalized Population	0.3%
Noninstitutionalized Population	0.7%

**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 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

## EXHIBIT B-5: Community Profile - Primary Trade Area

Gibbs Planning Group

### Community Profile

Ferndale PTA  
Area: 50.82 square miles

Prepared by Esri  
Latitude: 42.46149054  
Longitude: -83.1366491

<b>2015 Population 25+ by Educational Attainment</b>	
Total	181,715
Less than 9th Grade	3.1%
9th - 12th Grade, No Diploma	8.1%
High School Graduate	20.9%
GED/Alternative Credential	4.0%
Some College, No Degree	24.5%
Associate Degree	7.5%
Bachelor's Degree	18.9%
Graduate/Professional Degree	13.2%
<b>2015 Population 15+ by Marital Status</b>	
Total	214,894
Never Married	43.3%
Married	36.3%
Widowed	7.3%
Divorced	13.1%
<b>2015 Civilian Population 16+ in Labor Force</b>	
Civilian Employed	87.9%
Civilian Unemployed	12.1%
<b>2015 Employed Population 16+ by Industry</b>	
Total	112,772
Agriculture/Mining	0.1%
Construction	3.3%
Manufacturing	13.9%
Wholesale Trade	2.3%
Retail Trade	9.7%
Transportation/Utilities	3.9%
Information	2.5%
Finance/Insurance/Real Estate	7.4%
Services	52.7%
Public Administration	4.2%
<b>2015 Employed Population 16+ by Occupation</b>	
Total	112,771
White Collar	64.8%
Management/Business/Financial	14.8%
Professional	25.5%
Sales	10.0%
Administrative Support	14.5%
Services	18.4%
Blue Collar	16.8%
Farming/Forestry/Fishing	0.0%
Construction/Extraction	3.0%
Installation/Maintenance/Repair	3.4%
Production	5.9%
Transportation/Material Moving	4.5%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

## EXHIBIT B-6: Community Profile - Primary Trade Area

Gibbs Planning Group

### Community Profile

Ferndale PTA  
Area: 50.82 square miles

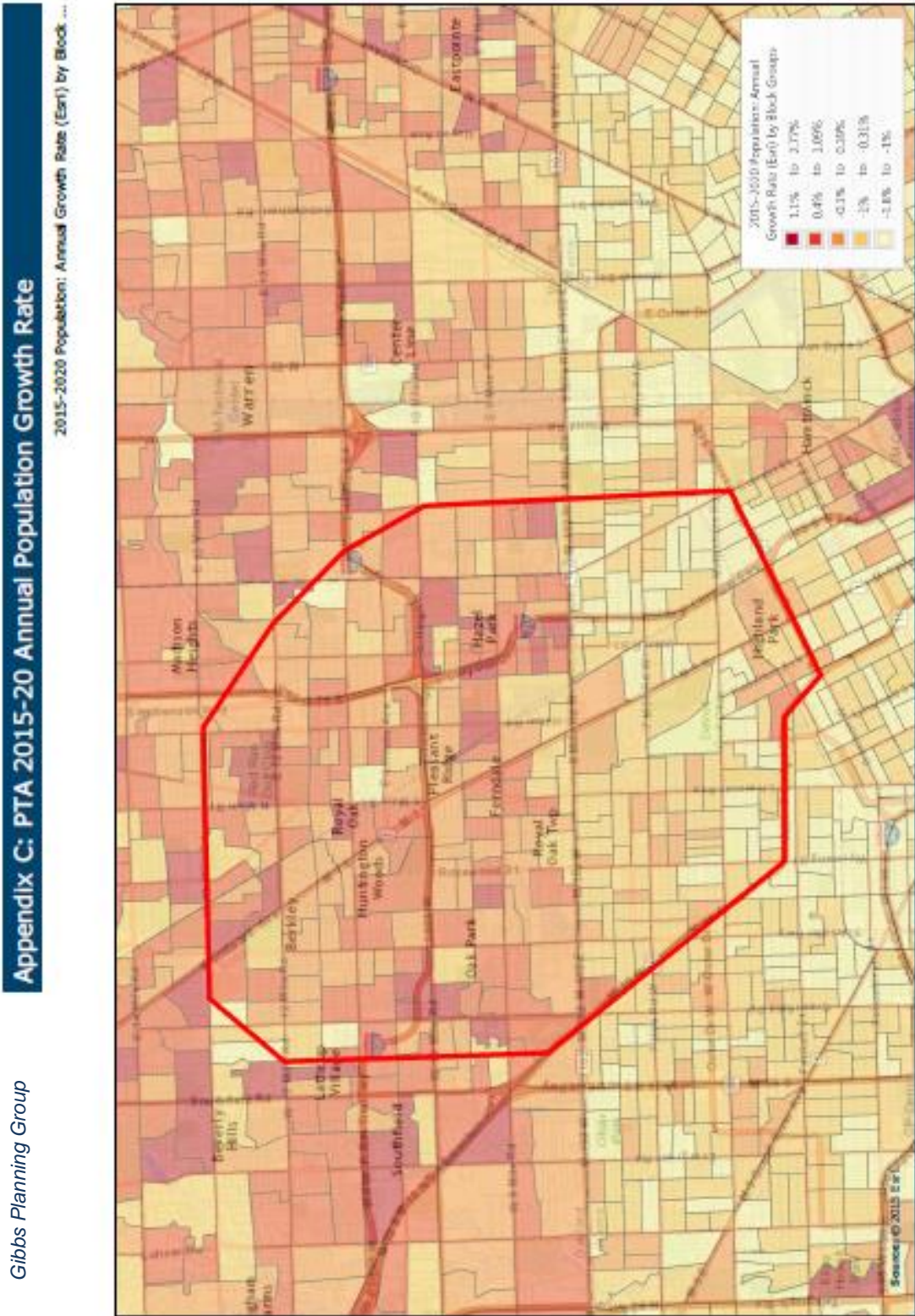
Prepared by Esri  
Latitude: 42.46149054  
Longitude: -83.1366491

<b>2010 Households by Type</b>	
Total	112,213
Households with 1 Person	35.0%
Households with 2+ People	65.0%
Family Households	57.7%
Husband-wife Families	32.3%
With Related Children	13.6%
Other Family (No Spouse Present)	25.5%
Other Family with Male Householder	5.4%
With Related Children	2.5%
Other Family with Female Householder	20.1%
With Related Children	11.8%
Nonfamily Households	7.3%
All Households with Children	28.2%
Multigenerational Households	4.8%
Unmarried Partner Households	6.8%
Male-female	5.8%
Same-sex	1.0%
<b>2010 Households by Size</b>	
Total	112,214
1 Person Household	35.0%
2 Person Household	30.2%
3 Person Household	15.4%
4 Person Household	10.7%
5 Person Household	5.0%
6 Person Household	2.1%
7 + Person Household	1.6%
<b>2010 Households by Tenure and Mortgage Status</b>	
Total	112,214
Owner Occupied	64.8%
Owned with a Mortgage/Loan	45.2%
Owned Free and Clear	19.6%
Renter Occupied	35.2%

**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 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

## EXHIBIT C: Primary Trade Area Annual Population Growth Rate Map



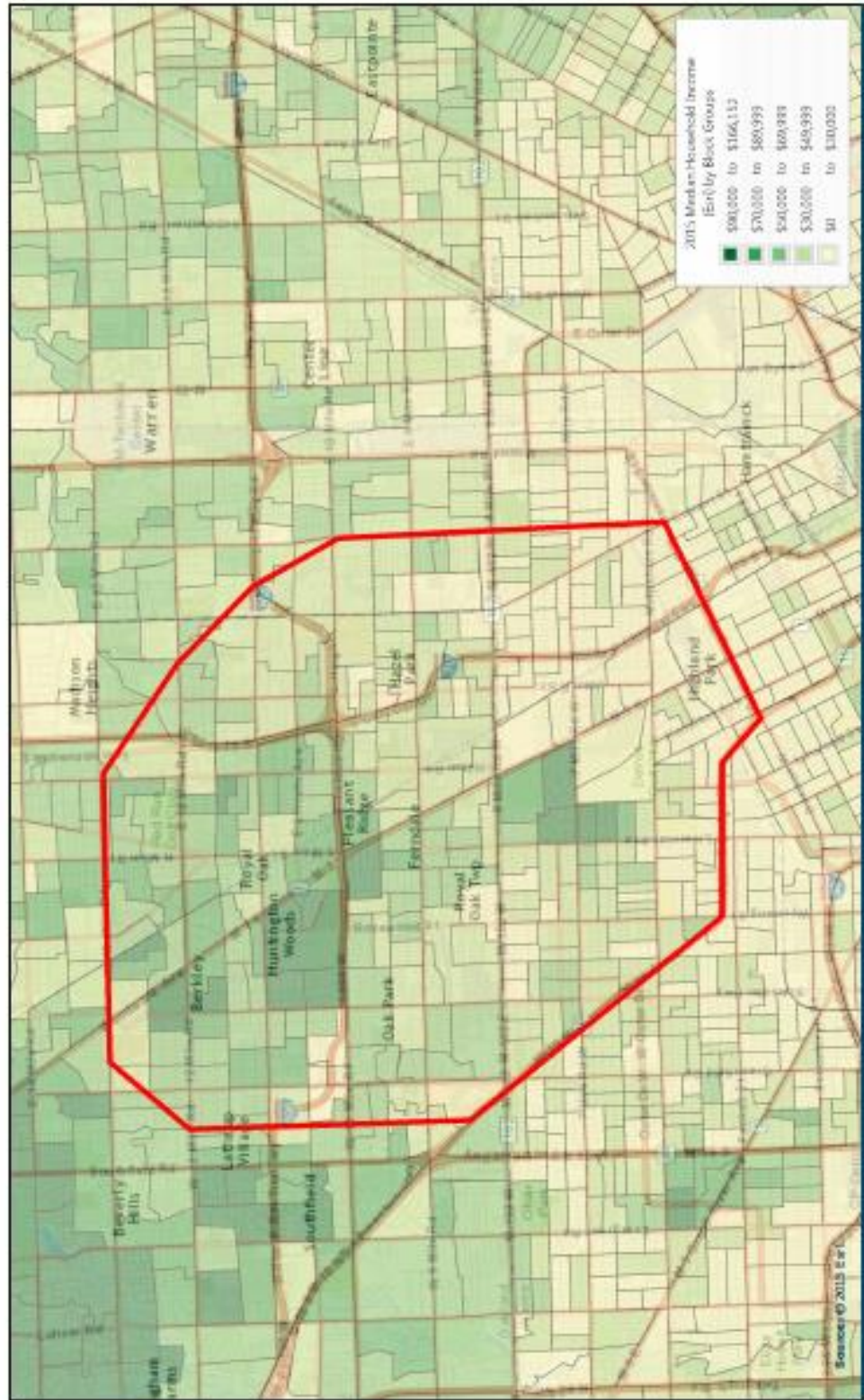


## EXHIBIT D: Primary Trade Area Median Income Map

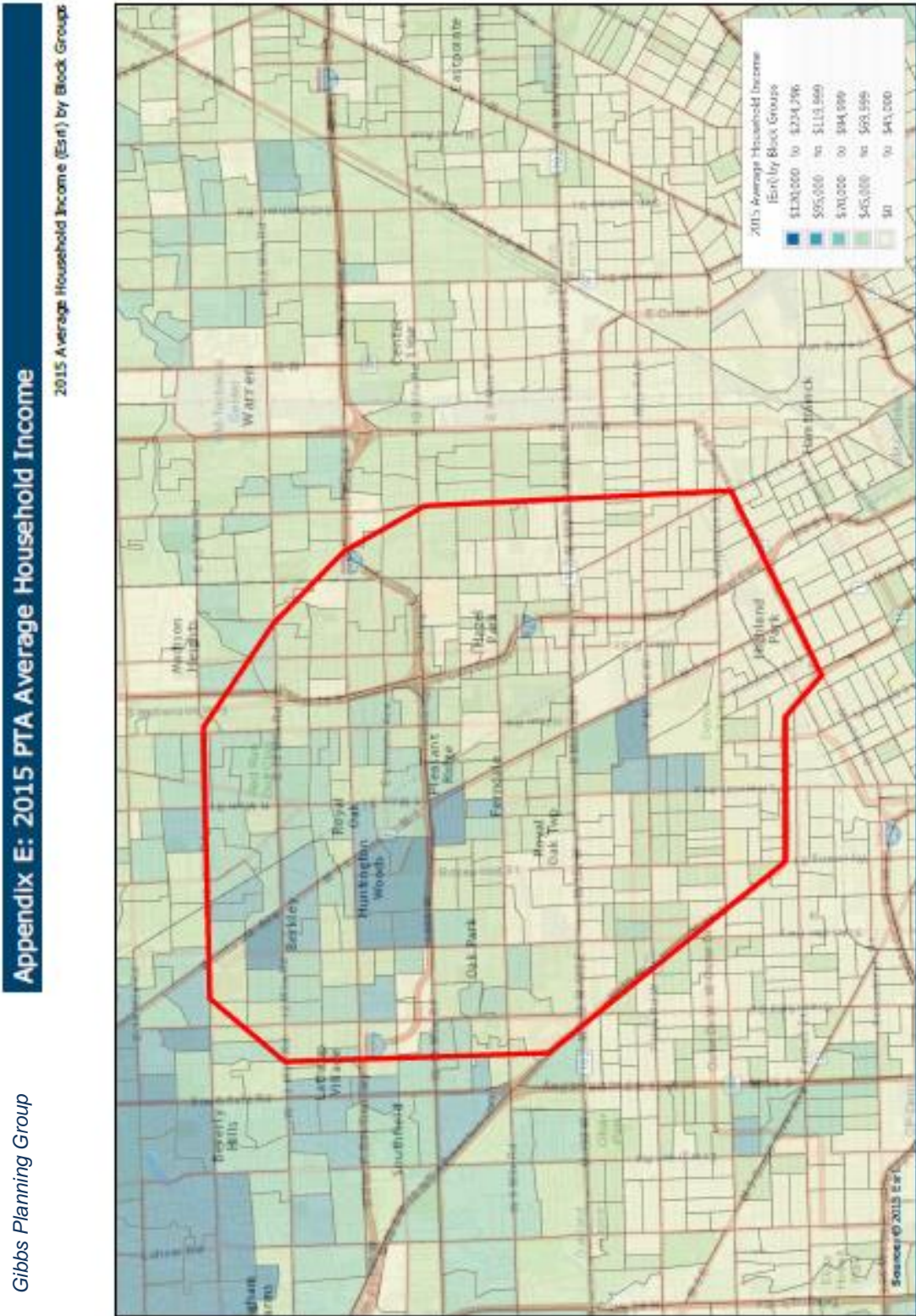
### Appendix D: 2015 PTA Median Household Income

Gibbs Planning Group

2015 Median Household Income (Est) by Block Groups

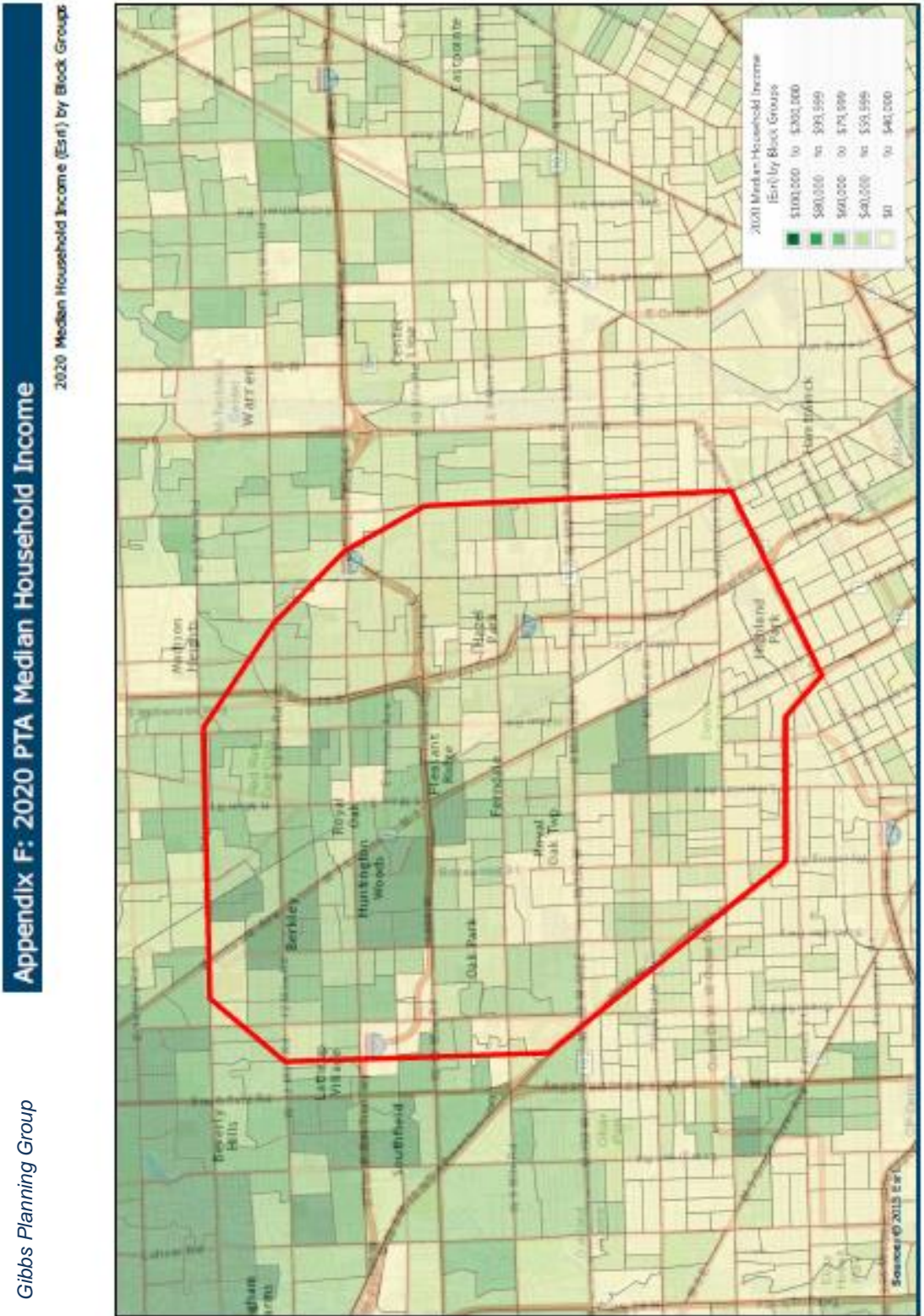


## EXHIBIT E: Primary Trade Area 2015 Average Household Income Map





## EXHIBIT F: Primary Trade Area 2020 Median Household Income Map



## EXHIBIT G: Primary Trade Area 2020 Average Household Income Map

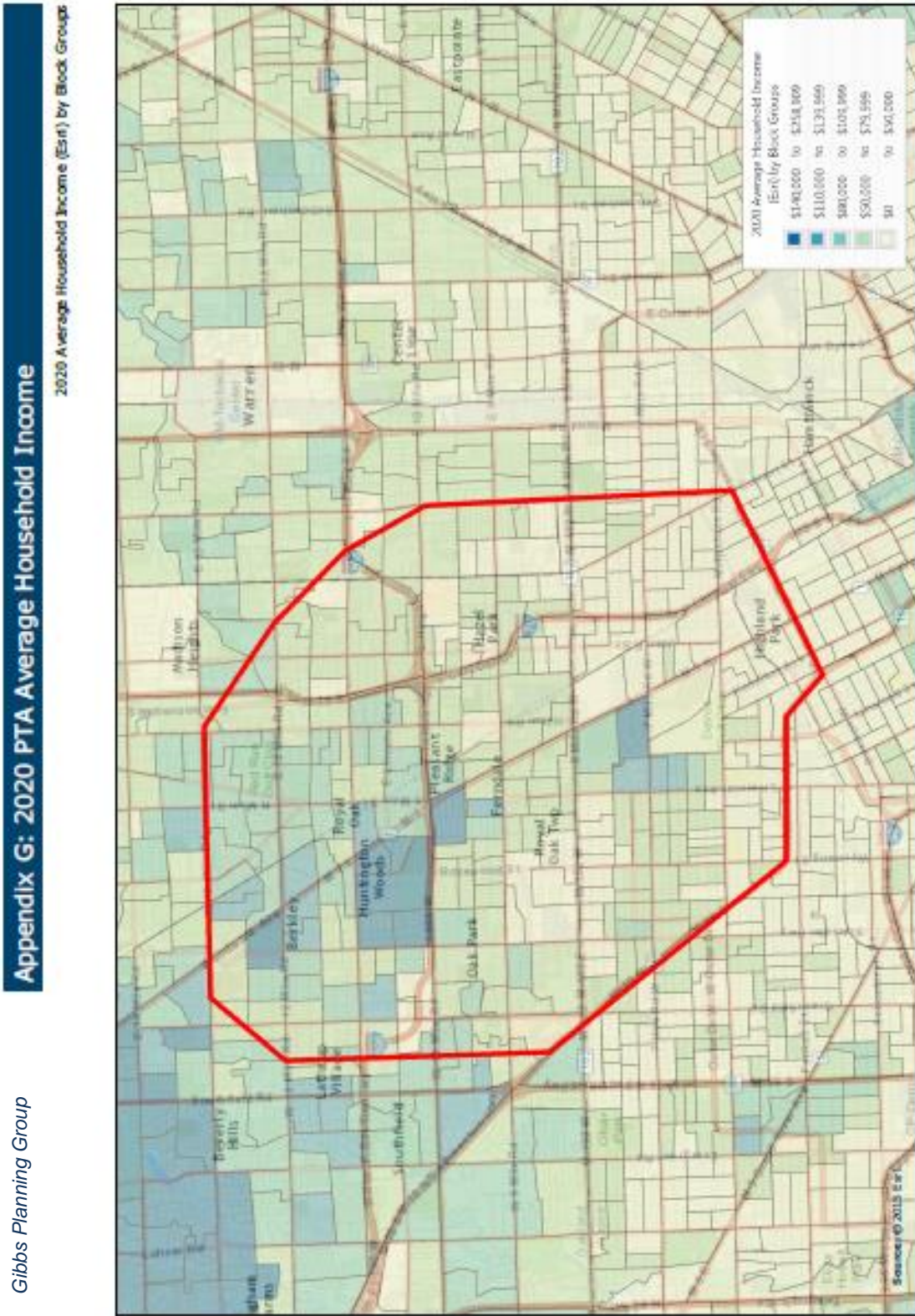
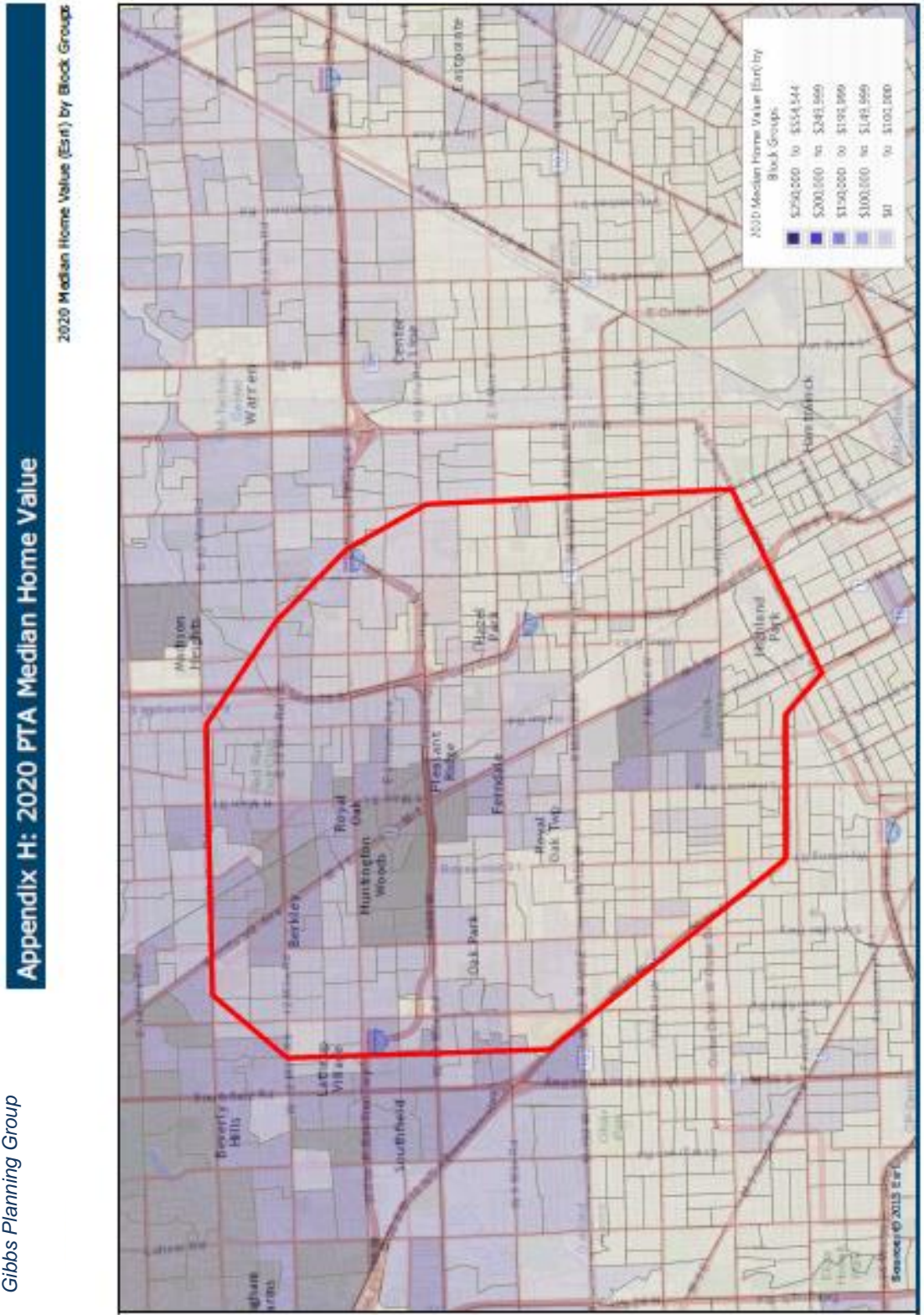




EXHIBIT H: Primary Trade Area 2020 Median Household Income Map



Gibbs Planning Group

## EXHIBIT I-1: Housing Profile - Primary Trade Area

Gibbs Planning Group

### Housing Profile

Ferndale PTA  
Area: 50.82 square miles

Prepared by Esri  
Latitude: 42.46149054  
Longitude: -83.1366491

Population		Households	
2010 Total Population	265,566	2015 Median Household Income	\$44,485
2015 Total Population	260,376	2020 Median Household Income	\$51,941
2020 Total Population	260,565	2015-2020 Annual Rate	3.15%
2015-2020 Annual Rate	0.01%		

Housing Units by Occupancy Status and Tenure	Census 2010		2015		2020	
	Number	Percent	Number	Percent	Number	Percent
Total Housing Units	127,974	100.0%	129,340	100.0%	130,664	100.0%
Occupied	112,214	87.7%	111,419	86.1%	112,039	85.7%
Owner	72,676	56.8%	70,262	54.3%	70,503	54.0%
Renter	39,538	30.9%	41,157	31.8%	41,536	31.8%
Vacant	15,760	12.3%	17,922	13.9%	18,625	14.3%

Owner Occupied Housing Units by Value	2015		2020	
	Number	Percent	Number	Percent
Total	70,254	100.0%	70,495	100.0%
<\$50,000	6,634	9.4%	4,647	6.6%
\$50,000-\$99,999	22,321	31.8%	15,229	21.6%
\$100,000-\$149,999	18,258	26.0%	14,730	20.9%
\$150,000-\$199,999	12,777	18.2%	18,218	25.8%
\$200,000-\$249,999	4,838	6.9%	8,541	12.1%
\$250,000-\$299,999	2,633	3.7%	4,365	6.2%
\$300,000-\$399,999	1,828	2.6%	2,703	3.8%
\$400,000-\$499,999	581	0.8%	1,076	1.5%
\$500,000-\$749,999	337	0.5%	701	1.0%
\$750,000-\$999,999	33	0.0%	259	0.4%
\$1,000,000+	14	0.0%	26	0.0%
Median Value	\$116,902		\$151,761	
Average Value	\$132,790		\$163,662	

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

## EXHIBIT I-2: Housing Profile - Primary Trade Area

Gibbs Planning Group

### Housing Profile

Ferndale PTA  
Area: 50.82 square miles

Prepared by Esri  
Latitude: 42.46149054  
Longitude: -83.1366491

Census 2010 Owner Occupied Housing Units by Mortgage Status			Number	Percent
Total			72,675	100.0%
Owned with a Mortgage/Loan			50,688	69.7%
Owned Free and Clear			21,987	30.3%
Census 2010 Vacant Housing Units by Status			Number	Percent
Total			15,760	100.0%
For Rent			4,968	31.5%
Rented- Not Occupied			246	1.6%
For Sale Only			2,028	12.9%
Sold - Not Occupied			572	3.6%
Seasonal/Recreational/Occasional Use			248	1.6%
For Migrant Workers			1	0.0%
Other Vacant			7,729	49.0%
Census 2010 Occupied Housing Units by Age of Householder and Home Ownership			Owner Occupied Units	
	Occupied Units		Number	% of Occupied
Total	112,212		72,674	64.8%
15-24	3,502		729	20.8%
25-34	18,406		8,781	47.7%
35-44	21,295		13,108	61.6%
45-54	22,309		15,181	68.0%
55-64	20,269		14,872	73.4%
65-74	12,453		9,448	75.9%
75-84	9,577		7,321	76.4%
85+	4,401		3,234	73.5%
Census 2010 Occupied Housing Units by Race/Ethnicity of Householder and Home Ownership			Owner Occupied Units	
	Occupied Units		Number	% of Occupied
Total	112,215		72,676	64.8%
White Alone	59,239		44,032	74.3%
Black/African American	49,114		26,409	53.8%
American Indian/Alaska	346		185	53.5%
Asian Alone	1,332		860	64.6%
Pacific Islander Alone	36		16	44.4%
Other Race Alone	341		195	57.2%
Two or More Races	1,807		979	54.2%
Hispanic Origin	1,472		893	60.7%
Census 2010 Occupied Housing Units by Size and Home Ownership			Owner Occupied Units	
	Occupied Units		Number	% of Occupied
Total	112,214		72,675	64.8%
1-Person	39,299		22,678	57.7%
2-Person	33,944		23,986	70.7%
3-Person	17,280		11,756	68.0%
4-Person	12,032		8,369	69.6%
5-Person	5,578		3,485	62.5%
6-Person	2,317		1,397	60.3%
7+ Person	1,764		1,004	56.9%

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

## APPENDIX J-1: Dominant Tapestry Lifestyles

Gibbs Planning Group

### Tapestry Segmentation Area Profile

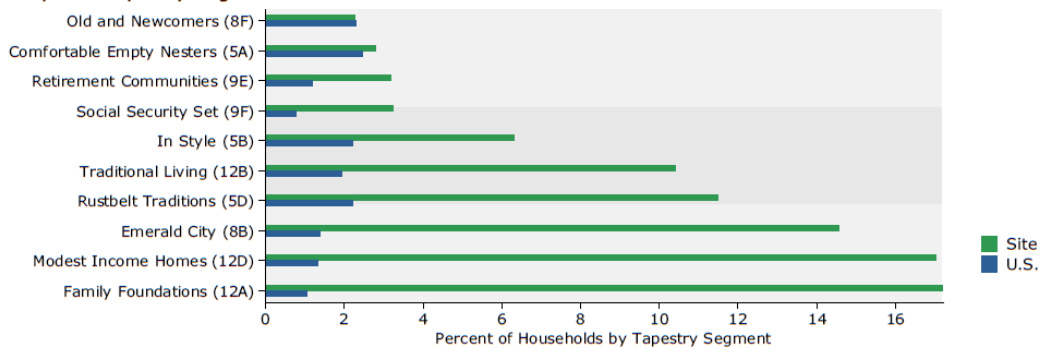
Ferndale PTA  
Area: 50.82 square miles

Prepared by Esri  
Latitude: 42.46149054  
Longitude: -83.1366491

#### Top Twenty Tapestry Segments

Rank	Tapestry Segment	2015 Households		2015 U.S. Households		Index
		Percent	Cumulative Percent	Percent	Cumulative Percent	
1	Family Foundations (12A)	17.2%	17.2%	1.1%	1.1%	1606
2	Modest Income Homes (12D)	17.1%	34.3%	1.4%	2.5%	1,254
3	Emerald City (8B)	14.6%	48.9%	1.4%	3.9%	1,035
4	Rustbelt Traditions (5D)	11.5%	60.4%	2.2%	6.1%	514
5	Traditional Living (12B)	10.4%	70.8%	2.0%	8.1%	528
<b>Subtotal</b>		<b>70.8%</b>		<b>8.1%</b>		
6	In Style (5B)	6.4%	77.2%	2.3%	10.4%	282
7	Social Security Set (9F)	3.3%	80.5%	0.8%	11.2%	404
8	Retirement Communities (9E)	3.2%	83.7%	1.2%	12.4%	265
9	Comfortable Empty Nesters (5A)	2.8%	86.5%	2.5%	14.9%	113
10	Old and Newcomers (8F)	2.3%	88.8%	2.3%	17.2%	98
<b>Subtotal</b>		<b>18.0%</b>		<b>9.1%</b>		
11	Hardscrabble Road (8G)	2.0%	90.8%	1.2%	18.4%	163
12	Top Tier (1A)	1.5%	92.3%	1.7%	20.1%	85
13	Metro Renters (3B)	1.4%	93.7%	1.5%	21.6%	95
14	City Commons (11E)	1.3%	95.0%	0.9%	22.5%	139
15	Urban Chic (2A)	0.8%	95.8%	1.3%	23.8%	60
<b>Subtotal</b>		<b>7.0%</b>		<b>6.6%</b>		
16	Heartland Communities (6F)	0.8%	96.6%	2.4%	26.2%	33
17	Savvy Suburbanites (1D)	0.6%	97.2%	3.0%	29.2%	20
18	Down the Road (10D)	0.5%	97.7%	1.1%	30.3%	45
19	Small Town Simplicity (12C)	0.5%	98.2%	1.9%	32.2%	24
20	High Rise Renters (13E)	0.4%	98.6%	0.5%	32.7%	78
<b>Subtotal</b>		<b>2.8%</b>		<b>8.9%</b>		
<b>Total</b>		<b>98.5%</b>		<b>32.8%</b>		<b>301</b>

#### Top Ten Tapestry Segments Site vs. U.S.



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

**Source:** Esri



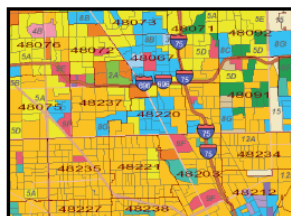
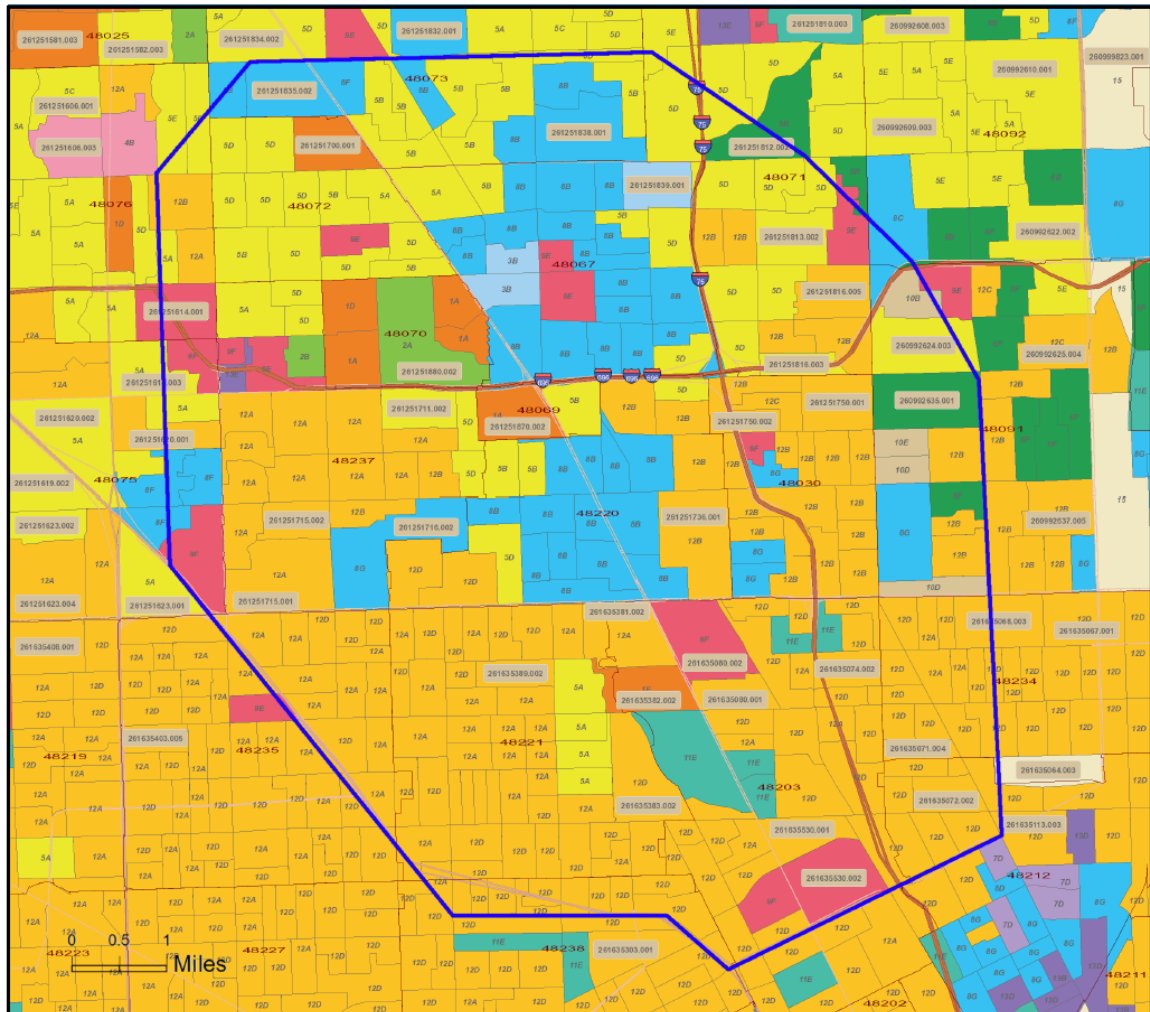
## APPENDIX J-2: Dominant Tapestry Lifestyles

Gibbs Planning Group

### Dominant Tapestry Map

Ferndale PTA  
Area: 50.82 square miles

Prepared by Esri



Source: Esri

#### Tapestry LifeMode

- |   |   |
|---|---|
| <span style="color: brown;">■</span> L1: Affluent Estates       | <span style="color: blue;">■</span> L8: Middle Ground           |
| <span style="color: green;">■</span> L2: Upscale Avenues        | <span style="color: red;">■</span> L9: Senior Styles            |
| <span style="color: lightblue;">■</span> L3: Uptown Individuals | <span style="color: tan;">■</span> L10: Rustic Outposts         |
| <span style="color: pink;">■</span> L4: Family Landscapes       | <span style="color: teal;">■</span> L11: Midtown Singles        |
| <span style="color: yellow;">■</span> L5: GenXurban             | <span style="color: orange;">■</span> L12: Hometown             |
| <span style="color: darkgreen;">■</span> L6: Cozy Country       | <span style="color: purple;">■</span> L13: Next Wave            |
| <span style="color: grey;">■</span> L7: Ethnic Enclaves         | <span style="color: olive;">■</span> L14: Scholars and Patriots |

