

Fenton, Michigan

# RETAIL MARKET ANALYSIS



*Prepared for:*

FENTON DOWNTOWN DEVELOPMENT AUTHORITY  
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FINAL REPORT



*Fenton's remaining historic downtown remains at the community's crossroads.*

## **EXECUTIVE SUMMARY**

Like many American towns, Fenton's primary shopping has shifted from the historic downtown to strip shopping centers located along its edge. Downtown Fenton suffered further loss of commerce from a unique 1970's urban renewal experiment that closed its main street and replaced many of its historic commercial buildings with a "modern" one-level shopping center surrounded by surface parking lots. Presently, Fenton benefits by being located in the path of the wealthy and rapidly expanding Oakland and Genesee Counties. Both counties have experienced population growth rates of over 20% during the past decade. In addition, commercial growth has also been very strong along the U.S. 23 corridor, as is evident in the development around Silver Lake Village (which is part of the Fenton DDA). In fact, Fenton's current market demand far exceeds the supply of goods and services. Despite these high levels of growth, downtown Fenton has

maintained a small town charm and still has many of its traditional anchors including the Post Office, City Hall, Churches, Park, Community Center and even a historical museum.



*Downtown Fenton has many civic anchors including the unique historical museum and U.S. Post Office.*

This study finds that Fenton's Total Trade Area contains over 400,000 residents with a favorable median household income of \$53,400. More notable, there are an estimated 17,100 people within 3 miles of downtown Fenton, and median household income is \$59,400. Focus group studies indicated that most residents are pleased with the variety and quality of goods and services offered in the greater region. Most respondents would like to see additional restaurants, grocery and specialty stores located in the downtown area. Most Fenton residents report that they shop only in Genesee County.

This study further estimates that residents living in the total Fenton trade area will spend over 7.4 billion dollars in 2003 on goods and services including: department stores, apparel, restaurants, groceries, appliances, home furnishings and general retail. However, most of these purchases are made outside of the Fenton DDA area. Of the 7.4 billion retail dollars spent in 2003, GPG projects that existing and new Fenton businesses can capture over 91 million dollars. By 2008, the total trade area's retail spending will exceed 10.2 billion dollars, of which 71 million additional dollars can be potentially retained by Fenton DDA businesses (*see Exhibit A for a detail of spending*).



*The historic downtown and Dibbleville are disjointed because of the lack of street-front retail. Conversion of the old fire station into a restaurant and other infill mixed use development will help to link the downtown.*

GPG concludes that during the next five years, the greater Fenton area can support up to 755,000 square feet of new retail development both within the downtown area and within Silver Lake Village. This study recommends that the new retail be channeled to establish two specific shopping districts. The downtown is ideally located to become the region's primary neighborhood shopping district including grocery stores, cafes, restaurants, hardware and specialty retailers. The Silver Lake Village area should remain a regional destination with leading large format retailers and new lifestyle type tenants. Dibbleville and the traditional downtown should be linked with new in-fill commercial and residential development.

This new potential development includes over half a million sf of general merchandise stores (such as department stores, junior department stores, discount department stores





*Fenton's future retail growth should be grouped to create the downtown as the region's leading collection of neighborhood goods and services, while the Silver Lake Village-U.S. 23 area should continue to attract major retailers. Both commercial areas should be planned to include medium-density residential and pedestrian orientated environments.*

and warehouse clubs), 48,000 sf of apparel related categories, 58,000 sf of food related stores, including a 20,000 sf green grocer (such as Trader Joe's or Wild Oats), 12,500 sf of drug stores, 14,000 sf of dollar/variety stores, and 4,500 sf of home furnishings. A more detailed depiction of the supportable retail is displayed on the following page and Exhibit A in the Appendix.

## **BACKGROUND AND METHODOLOGY**

### ***Background***

Gibbs Planning Group (GPG) was commissioned by the City of Fenton Downtown Development Authority (DDA) to estimate the amount of additional retail development that Fenton could potentially support through 2008. For the purposes of this study, supportable retail is defined as new retail that could be deployed, developed and could offer a reasonable rate of return on an investment, given proper management and planning methods.

The Fenton DDA includes downtown Fenton (which incorporates Dibbleville and the portion of Fenton north of the Shiawassee River), as well as the area along U.S. Highway 23 that houses Silver Lake Village.

The results of this analysis are based upon the following assumptions:

- Housing and population growth will occur as projected herein

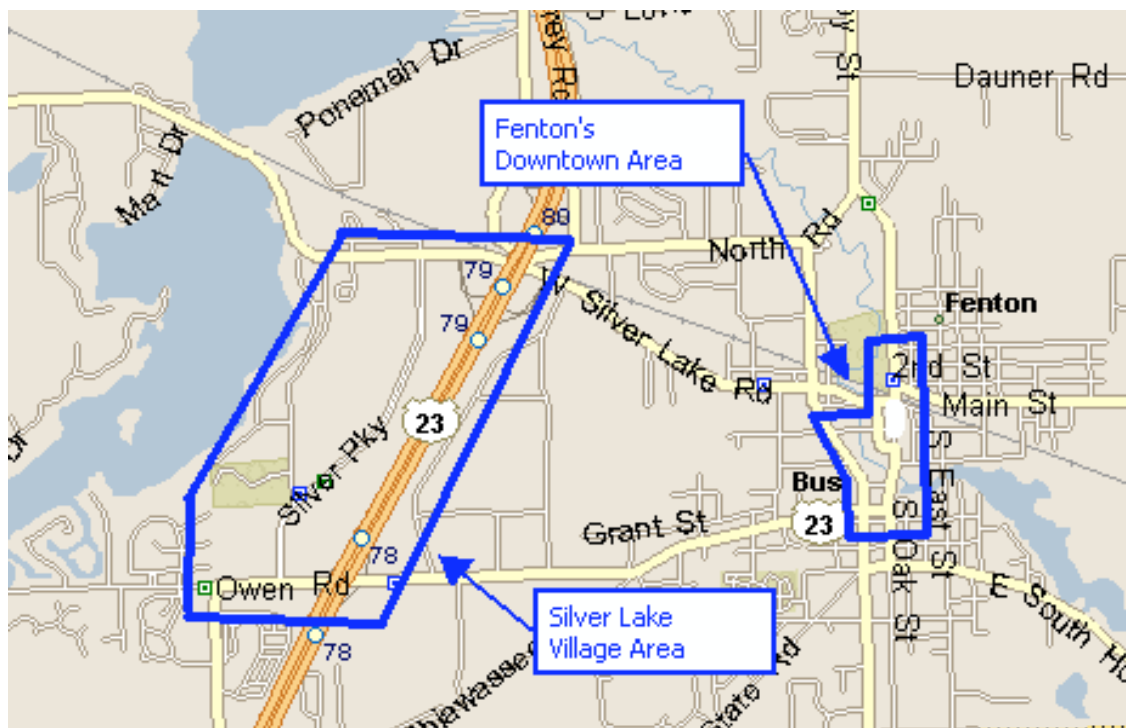
- No new retail/commercial development will occur unless mentioned in this report (any new significant retail development should be deducted from the supportable square footage outlined by this study).
- The necessary infrastructure changes will be made to the relevant access routes to ensure ease of access and improved mobility throughout the study area
- The retail establishments in Fenton will operate in a manner consistent with successful retailing, including remaining open during hours that are convenient to potential customers, maintaining clean facilities and streetscaping, and applying appropriate visual merchandising.

The following issues were addressed as part of this study:

- *Is retail development viable at the proposed mixed-use development?*
- *To whom would this retail appeal? That is, what are the population and demographic characteristics of trade area residents? What are the projected trade area population and demographic characteristics?*
- *What type of retail should be attracted? In particular, should the proposed retail component have a neighborhood, specialty or regional appeal?*
- *What types of retail are supportable at this development? What are the projected sales volumes?*

### ***Purpose & Limits of Study***

This study is intended to provide the Fenton DDA with a general forecast of the amount and types of retail development that are likely to be supportable through 2008. These forecast figures are intended to assist the DDA in making general policy decisions regarding growth and the character of its downtown. The findings of this of this study are also based upon the economy remaining relatively healthy and that there is no new major retail expansion in the study area. Should major new retail development occur in the primary trade area, than that amount of new retail should be deducted from the findings of this report.



*This report's study area is made up of the Silver Lake Village Shopping area and the general Fenton Downtown Area.*

GPG does not necessary recommend that any or all of the potential retail be accommodated in the study area. In addition, this study does not claim that Fenton DDA area has adequate space or appropriate locations for the supportable new retail development. This study is not intended and should not be the sole basis for infrastructure policy decisions or private sector investment.

### ***Methodology***

To address the above issues, a detailed field evaluation of retail around the site, as well as major existing and planned shopping centers in and surrounding the defined trade area, was conducted in early May and June 2003. During this evaluation, GPG thoroughly drove the market, visited and evaluated the major existing and planned retail concentrations in the area.

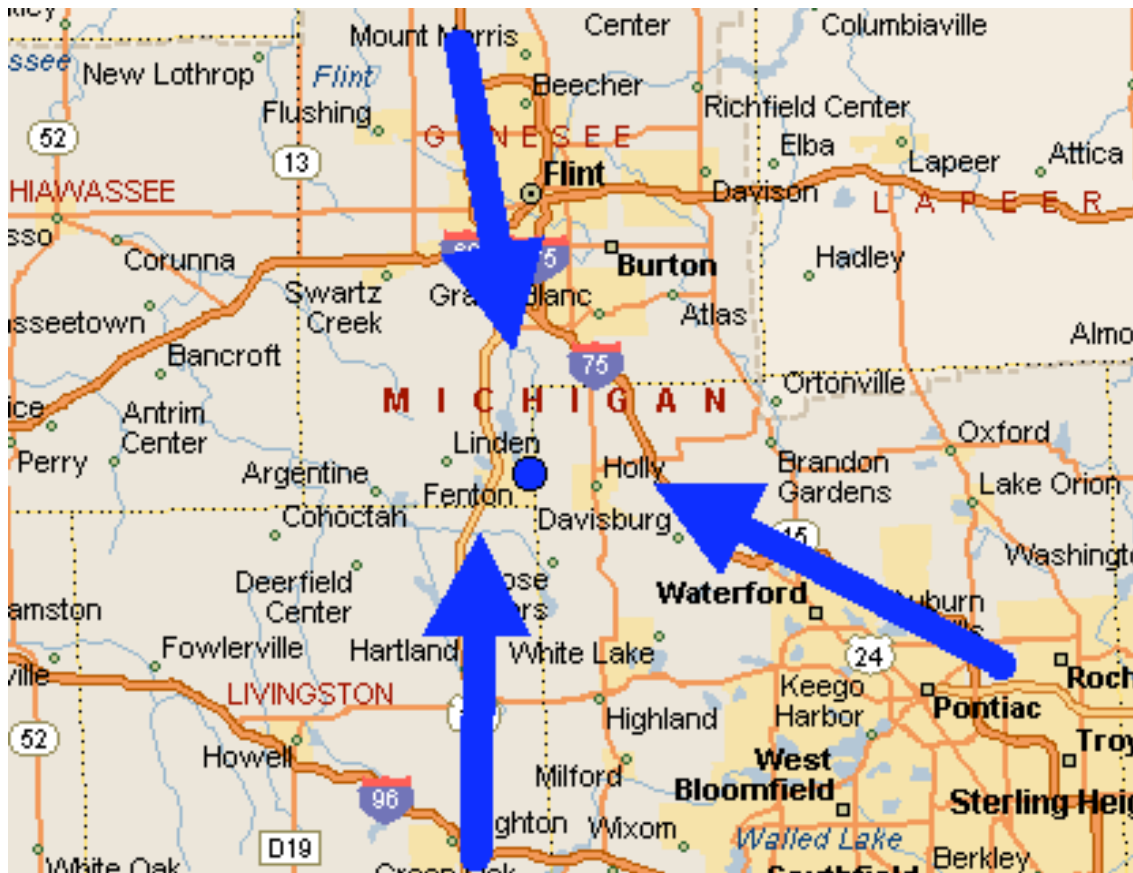
GPG also conducted focus groups with a variety of Fenton residents, including seniors, teenagers, business owners and local leaders to determine what they view as missing in downtown and what they would like to preserve. A detailed summary of the focus group discussions has been attached in the appendix of this report.

The area was visited during the daytime, as well as in the evening, to gain a qualitative understanding of the retail gravitational and traffic patterns throughout the study area. We then defined a trade area for the Fenton DDA based on this field evaluation and information provided by the client and focus groups. Population and demographic characteristics were collected by Census Tract and then updated based on information gathered from various local sources. This study assumes that all local data is accurate and reliable.

Finally, based on the population and demographic characteristics of the trade area, the existing and known retail competition, and traffic and retail gravitational patterns, we developed our qualitative assessment for the retail component of Fenton. This assessment included incorporating the existing square footages for a variety of retail categories, the expenditure potential for each retail category and the growth of the area to determine what retail categories are under-represented.

The expenditure potential refers to the total dollar amount estimated to be available for each retail category, as published by the U.S. Census Bureau, and supplemented with data from Claritas, Inc. Expenditure potential will not increase for any given retail category as more competitors are introduced into a market, but rather the market share for each unit will be redistributed. Expenditure potential will increase with population growth and an increase in household income levels.

By calculating what proportion of the area's expenditure potential is already accounted for by the existing and planned retail, it can be determined what retail categories have sufficient potential remaining. This methodology assumes there is no "over-storing" in a market. In other words, each retail category will attempt to reach the limit of its expenditure potential, but not go beyond it.



*The Fenton area is located at the axis of three merging growth corridors: Flint, Northern Oakland County and the Ann Arbor-Brighton U.S. 23 Freeway.*

## **MARKET OVERVIEW**

### *Genesee County*

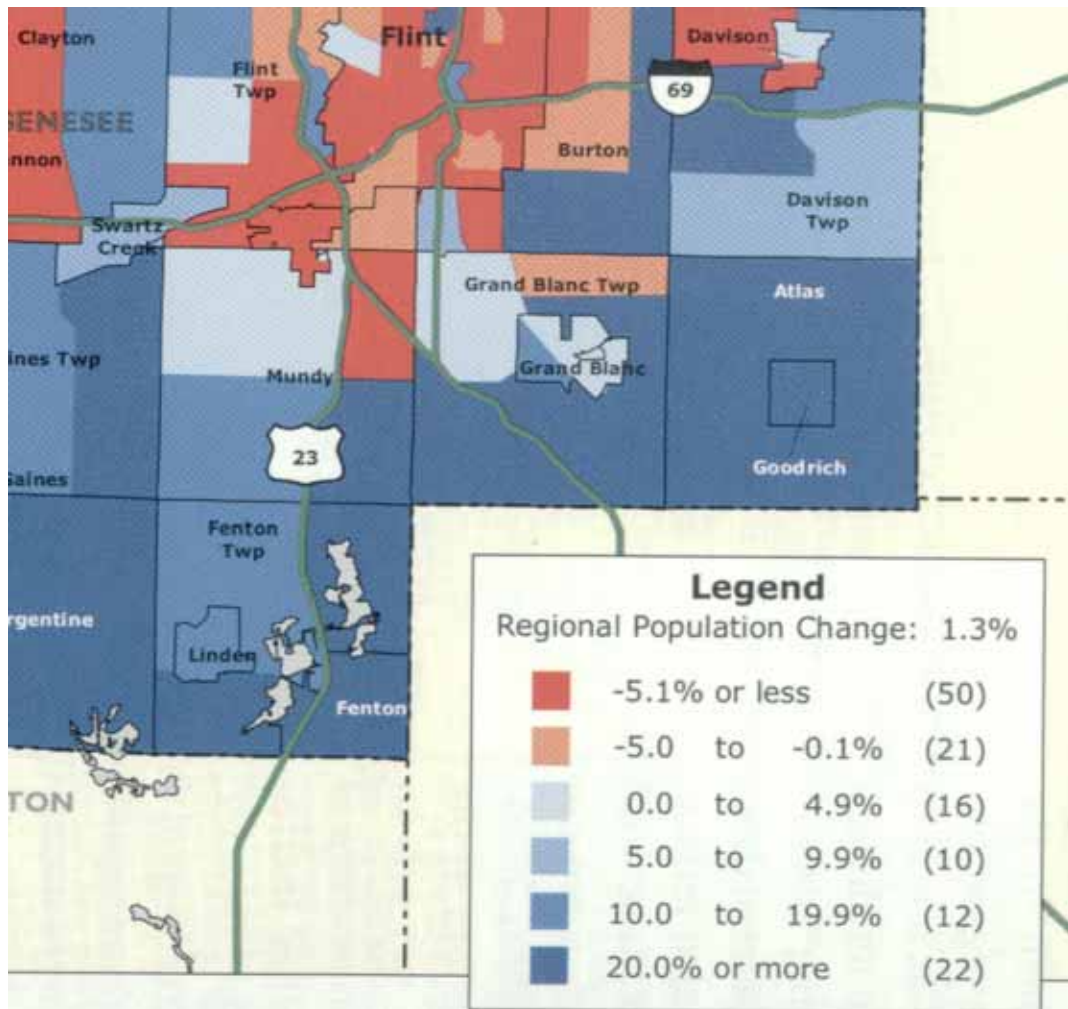
Genesee County is the fourth largest county in Michigan. During the 1990s, the population in the city of Flint and inner suburbs declined, while the cities and townships in the southern portion of the county grew rapidly. The growth in these southern communities was due in part to middle-class people migrating there from Detroit for cheaper housing and more space.

At the same time, the number of Genesee County residents who commute to Oakland County for work increased 134%, while the number of commuting jobs in Genesee County fell by 6%, an indicator of the region's economic ties to Detroit. However, this also reflects the weakness in Genesee County's economy. Genesee County actually lost jobs during the 1990s, when the nation as a whole was experiencing growth. Most hard-hit was the manufacturing industry, which decreased 40%. However, the demographic



makeup of communities within Genesee County varies greatly, as indicated in the table below:

<i>City/Town</i>	<i>Median Age</i>	<i>Bachelor Degree or Higher</i>	<i>Median Home Value</i>	<i>Median Household Income</i>
Fenton (City)	34.5 years	15.6%	\$93,980	\$50,850
Fenton (Township)	39.1 years	21.8%	\$142,400	\$80,200
Linden	39 Years	16.6%	\$100,458	\$59,700
Flint	31.1 Years	10.7%	\$48,009	\$30,565



As the above map indicates, the southern portion of Genesee County saw substantial population growth between 1990 and 2000.

### ***Livingston and Oakland Counties***

Fenton is also adjacent to Livingston and northern Oakland Counties and will draw a large portion of its customer base from these areas. Livingston County as a whole

experienced population growth over 20% between 1990 and 2000. Northern Oakland County has been experiencing similarly high levels of growth.

Livingston County has been seeing such increases in population for the last 3 decades, as the table below indicates. SEMCOG<sup>1</sup> anticipates that over the next 20 years, Livingston County will see a 17% increase in population per decade.

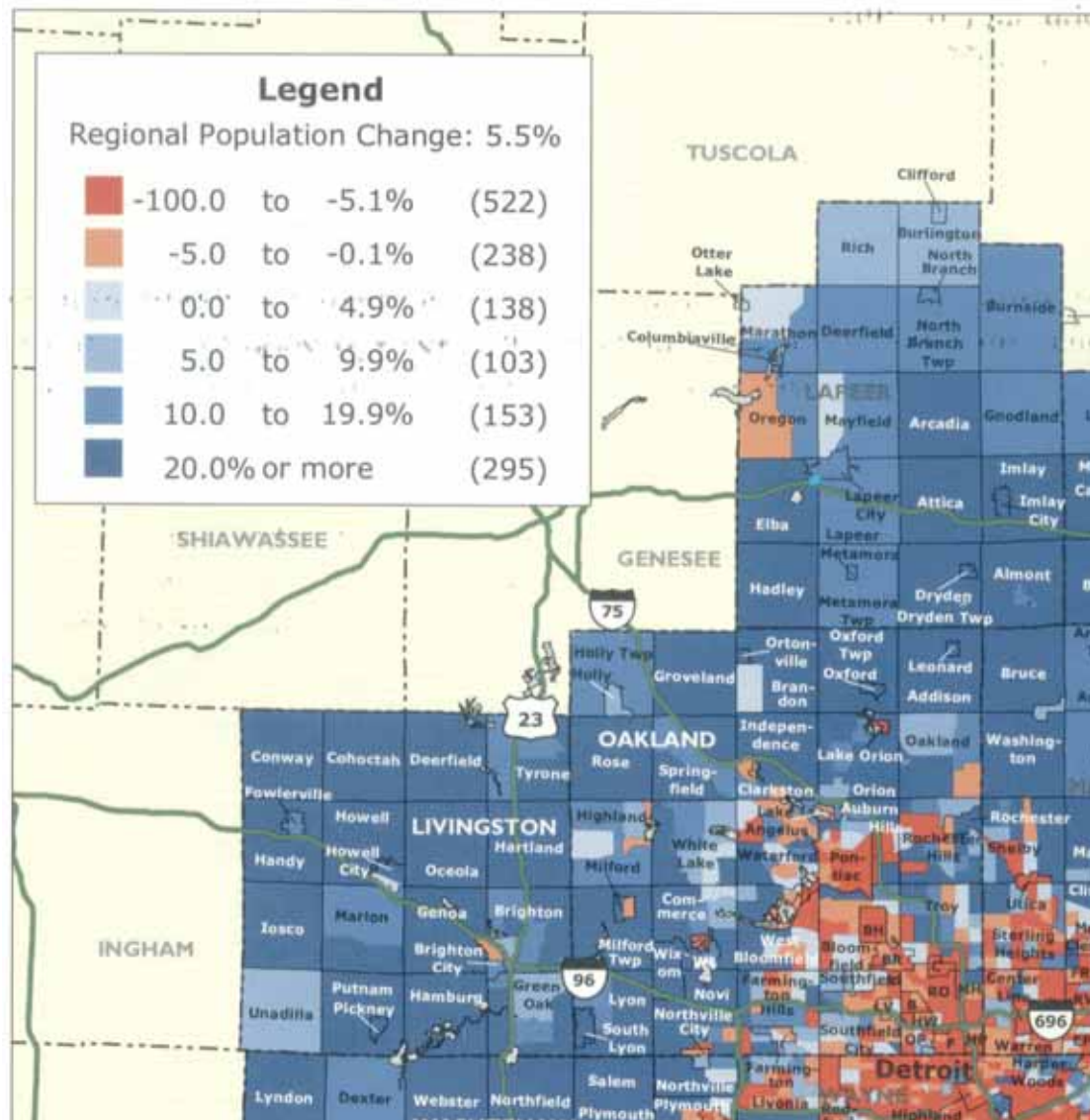
***Livingston County Population Growth***

	<b><i>Population</i></b>	<b><i>Percent Change</i></b>
1970	58,967	
1980	100,289	70.1%
1990	115,645	15.3%
1999	151,496	31%
2000	156,951	3.6%

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<sup>1</sup> SouthEast Michigan Council of Governments

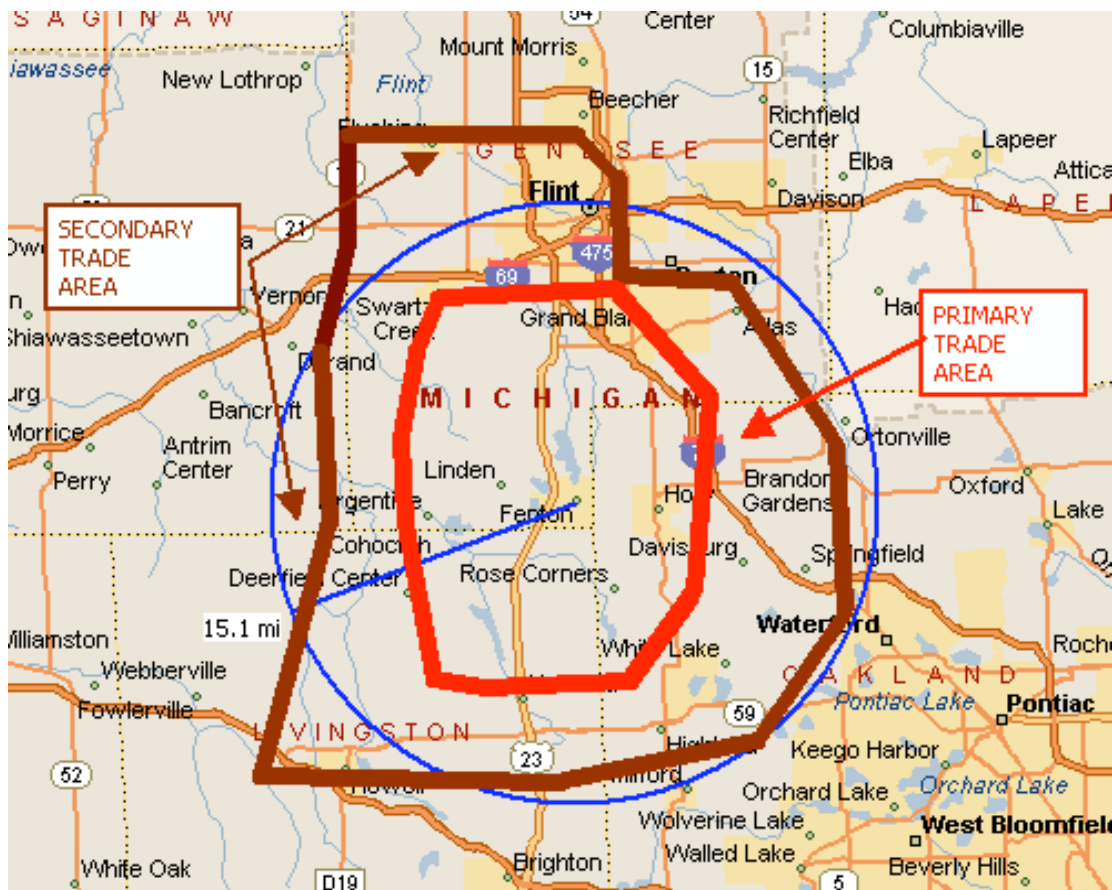
## MAP 1. PERCENTAGE CHANGE IN POPULATION BY CENSUS



These significant growth rates will be significant to the retail development in Fenton. As more and more people move to Livingston and northern Oakland Counties and commute into the Detroit area, the customer base for retail will expand. In fact, the exceptional choice in shopping areas can actually serve as an amenity, enticing people to move to the area. For more detail on the demographic comparisons between Genesee, Livingston and

Oakland Counties and the Fenton area, refer to the Trade Areas section of this report and Exhibit F in the Appendix.

As these exurban Detroit counties grow, commuting trends are changing. In Livingston County, for example, the number of people who commute outside the county to work was 45% in 1970 and 53% by 1980. By 1990, the proportion of commuters to other counties was 57%. Those people working outside the county in 1990 were commuting to Oakland County (17.9%), Washtenaw County (15.2%) and Wayne County (13.8%). These trends in commuting will likely continue to spread north and west from Detroit.



*The primary and total trade areas for Fenton include over 315,000 persons, with 124,000 households Earning a median annual income of \$52,700.*

## THE TRADE AREAS

The trade areas for the Fenton DDA were defined through a variety of factors, including accessibility, existing and planned competition, physical and psychological barriers and overall drawing power of the area. Based on discussions with the DDA, city officials,

residents and business owners, GPG defined the primary trade area to include the following cities of Fenton, Linden, Holly and Grand Blanc, with the total trade extending to include much of Flint, Durand, Byron Township and Hartland. It is assumed in the analysis that at least some of the Fenton DDA's customers will come from beyond the trade area boundaries, and that these customers will only frequent the study area once every 6 months.

### ***Primary Trade Area***



*The Primary Trade area includes many wealthy lake front residents.*

The primary trade area includes those customers who are likely to visit the Fenton downtown or Silver Lake Village on average of once a week for their neighborhood and convenience shopping, dining, entertainment and recreation. The Fenton DDA will be the primary shopping destination for these and larger retail needs.

The primary trade area is defined approximately as:

- *Southern edge of Flint City Limit to the north*
- *2 miles east of Holly Town boundary to the east*
- *Hartland city limit to the south*
- *Town of Argentine to the west*

### ***The Secondary Trade Area***



The secondary trade area is defined as the area from which the Fenton DDA will derive approximately 75% of all sales and from which people will generally frequent the retailers 1-2 times per month on average. The secondary trade area is approximately bounded by:

- Flushing town boundary (northern edge) to the north
- Just west of State Highway 15 to the east
- 3 miles south of M-59 to the south
- 10 miles from US 23 to the west
- 

### ***Demographic Characteristics***

The primary trade area is estimated to have 83,000 residents in 2003, increasing to 87,800 people in 2008, an average annual increase of 1.1%. The number of households are projected to increase at a similar rate, increasing from 31,800 in 2003 to 34,500 in 2008, an average annual increase of 1.6%. This growth rate is lower than the projected rate for southern Genesee County because it includes a portion of southern Flint and slower growing communities such as Grand Blanc.

The primary trade area is older and has good income levels and relatively high education levels. Median age is 37.5 years (2003), and median household income levels of \$68,000. Twenty percent of residents over the age of 25 have at least a bachelor's degree.

Housing stock in the primary trade area is older, with 40.4% of the housing built before 1970 and another 20.4% built between 1970 and 1979. Only 28% of the housing stock was built after 1989. How 10 years or less (61%), while only 16.6% have been there more than 20 years. This data reflects the number of families who are choosing the area to raise their families because they desire a small town close to major employment centers.



*Fenton has many fine historic homes, some of which have been updated into offices.*

The secondary trade area is projected to have 314,600 people in 2003, increasing 0.5% annually to 322,100 persons in 2008. The number of households are expected to increase at a similar rate, from 120,000 in 2003 to 124,100 households in 2008. The secondary trade area is slightly younger than the primary trade area with a median age of 34.7 years. Median household income is moderate at \$52,700 and 14.7% of the residents over the age of 25 has a bachelor's degree or higher.

As with the primary trade area, housing stock in the secondary trade is older, with 58.1% of the homes being built before 1970 and only 16% being constructed since 1989. Almost 60% of residents have been in their homes for less than 10 years, while only about 18% have been there 20 or more years.



*Fenton's new senior housing development is located adjacent to the city hall and helps to bring many residents into the downtown. More multi-family housing development in the downtown area will help to attract new retailers and restaurants.*

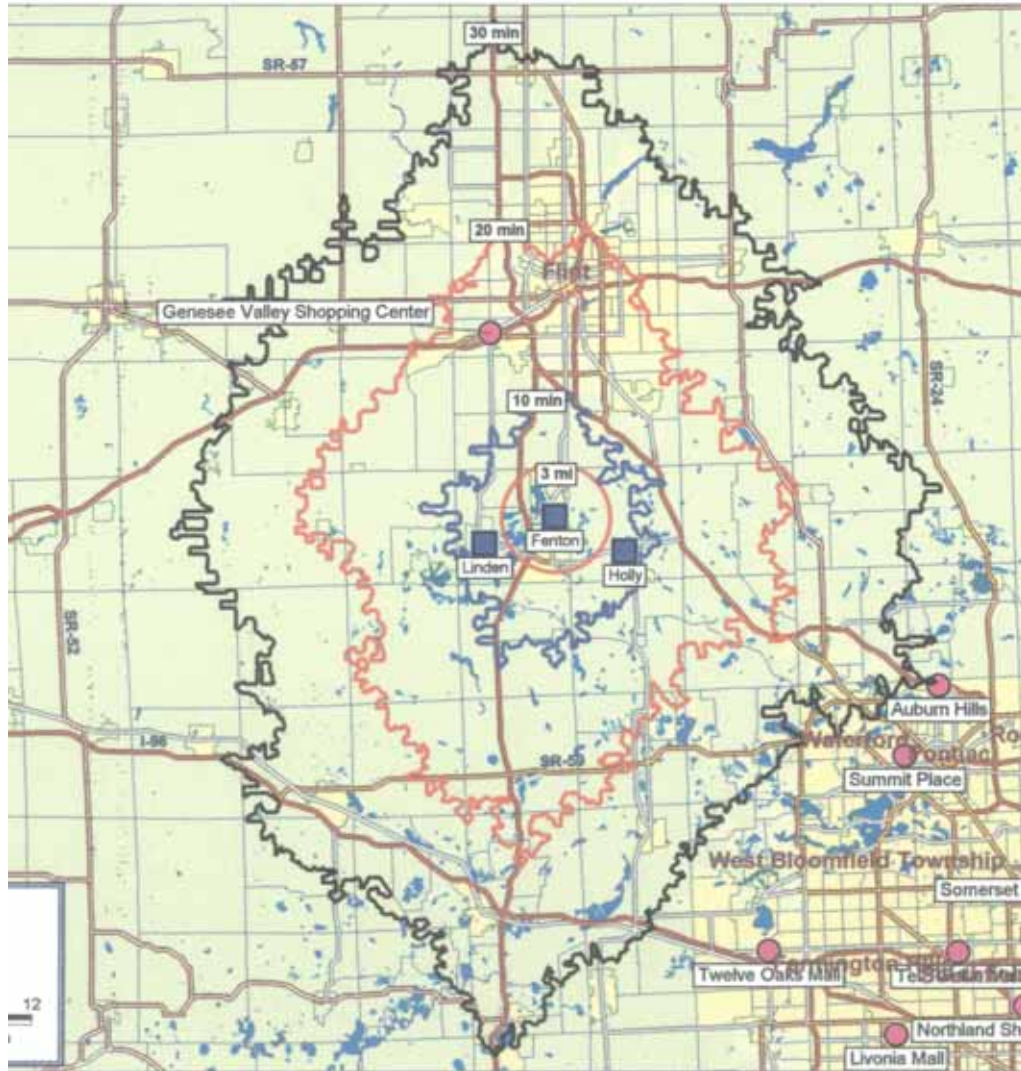
The table below compares the total trade area demographic characteristics with those for a 3-mile ring, Genesee, Livingston and Oakland Counties.

<i>Characteristics</i>	<i>Total Trade Area</i>	<i>3-Mile Ring</i>	<i>Genesee County</i>	<i>Livingston County</i>	<i>Oakland County</i>
Median Household Income	\$41,700	\$58,400	\$48,100	\$73,900	\$74,500
Median Age	41.9 Years	38.0Years	35.4 Years	36.5 Years	37.0 Years
Persons Per Household	2.1	2.4	2.5	2.8	2.5

\*Source: ScanUS, Inc. and U.S. Census Bureau

## **DRIVE TIMES**

Although Fenton is located with-in a 30 minute drive time of several major urban areas including: Flint, Novi and Auburn Hills, its residents can choose only from three major shopping centers: Silver Lake Village, Genesee Valley Mall and Great Lakes Crossing.



### ***Drive-Time Demographic Comparison***

<i><b>Characteristic</b></i>	<i><b>10-Minute Drive</b></i>	<i><b>20-Minute Drive</b></i>	<i><b>30-Minute Drive</b></i>
2002 Population	47,300	293,600	705,900
2007 Estimated Population	50,900	310,100	743,800
Projected 2002-07 Population Growth	7.6%	5.6%	5.4%
Median Age	37.3 Years	35.7 Years	35.8 Years
Total Per Capita Income	\$27,981	\$24,447	\$25,497
Median Household Income	\$62,295	\$52,678	\$56,790
Median Disposable Income	\$51,191	\$43,791	\$56,335
Average Household Size	2.5	2.5	2.6

\*Source: ScanUS and U.S. Census data

## **SITE CHARACTERISTICS**



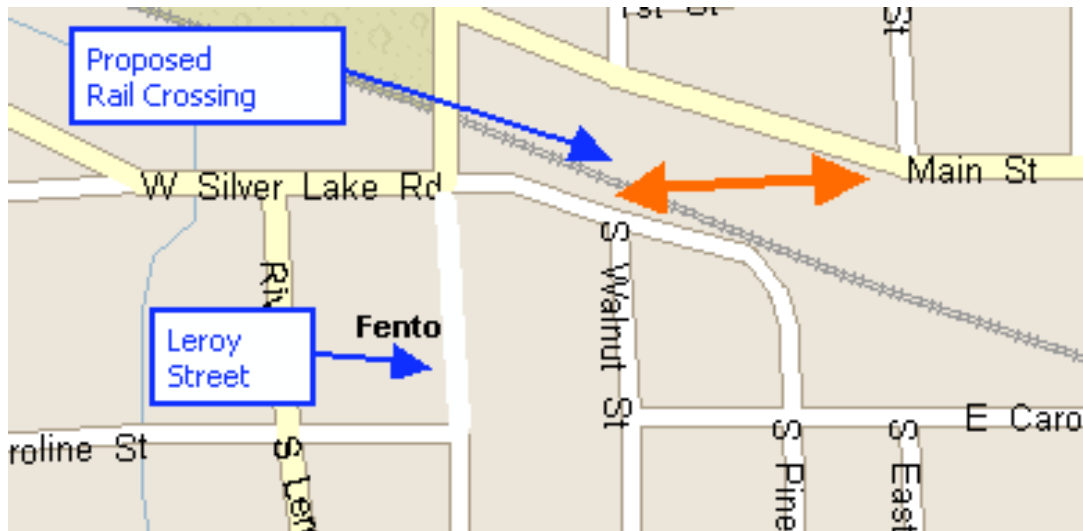


*Downtown Fenton remains at the major cross roads of the region. The recent opening of Leroy Street and the proposed new rail road crossing-connection of Silver Lake Road will significantly enhance the retail potential for the downtown shops.*

### ***Access***

After decades of being cut-off from surround streets, downtown Fenton's accessibility has been significantly improved with the recent opening of Leroy Street. Access to the downtown and Silver Lake Village will be even more improved with the planned new rail road crossing at Silver Lake Road and Leroy Street. The greater Fenton area is also easily accessible via U.S. Highway 23, either from Brighton, Ann Arbor or Detroit to the south or from Flint to the north. Silver Lake Village is located directly off U.S. 23 and the downtown area can be quickly reached from either Owen (which becomes Shiawassee Road) or Silver Lake Roads. Regional east-west access does not exist, but Fenton is still easily accessible from Lansing to the west and areas such as Holly and Grand Blanc to the east.





*The proposed new rail road crossing will link Silver Lake Road and Main Street ,will remove a bottleneck and make access to the downtown much easier for shoppers.*

### ***Visibility and Parking***

The downtown area can be easily viewed from Silver Lake Road at Leroy Street, giving its shopping district much local exposure. The Silver Lake Village area has excellent visibility from US 23 in both directions. Ingress/egress from Silver Lake Village is adequate and is assumed to continue to be so throughout any additional development.

While some may not be able to park directly in front of their primary destination, both the Downtown area and Silver Lake Village have ample parking. Fenton has plenty of surface lots and on-street parking with an overall ratio of 4 cars per 1000 sf of commercial building. Most successful downtowns have an overall parking ration of 2.7-3.0 cars per 1000 of building. Recently, the Urban Land Institute has lowered ideal suburban shopping center parking ratios to 4.0 cars per 1000.

This study estimates that presently Fenton has approximately 70,000 sf of gross commercial building area in the historic downtown area, including the bank, historic block and the one-level shopping center (NIC the Church). There are an estimated 280 surface parking and on-street parking stalls in the Historic area. Future retail development will require additional parking in both the downtown and Silver Lake Village area.



*Fenton is currently home to Silver Lake Village, a shopping area which is home to a variety of retailers and centers within the complex. Existing retailers include Wal-Mart, Home Depot, VG's, Farmer Jack, Michael's and Sears Hardware.*

### ***Existing Conditions***

The Fenton DDA consists of both the Silver Lake Village area and downtown Fenton (including Dibbleville). Silver Lake Village is a large complex comprised of major discount department stores, big-box retailers, restaurants, office and multiple-family residential. This shopping district currently houses a number of retail concepts, including Wal-Mart, Home Depot, Sears Hardware, VG's, Farmer Jack and a variety of restaurants from fast food to a quality steak house. Silver Lake Village comprises the vast majority of the DDA's present retail and restaurant space.



*Downtown Fenton has lots of underutilized prime development land.*

Although only a fraction of its historic pre-urban renewal size, downtown Fenton has an once in a generation opportunity to re-build itself. Given the tremendous amount of new retail likely to locate in the Fenton area, many tenants would be attracted to build in the downtown area. However, such leading regional and national retailers will need a significant amount of new buildings and parking if they are to locate downtown rather than along the freeways. Fortunately, much of downtown Fenton is vacant, surface parking or other underutilized land uses that lend themselves to new development.

Recently Brighton, Northville, Howell and Royal Oak have implemented new development models that may be appropriate for downtown Fenton. These new types tend to be mixed-use, 3-5 levels with retail located on the first level. Office and residential occupy the upper levels of the new mixed-use buildings.

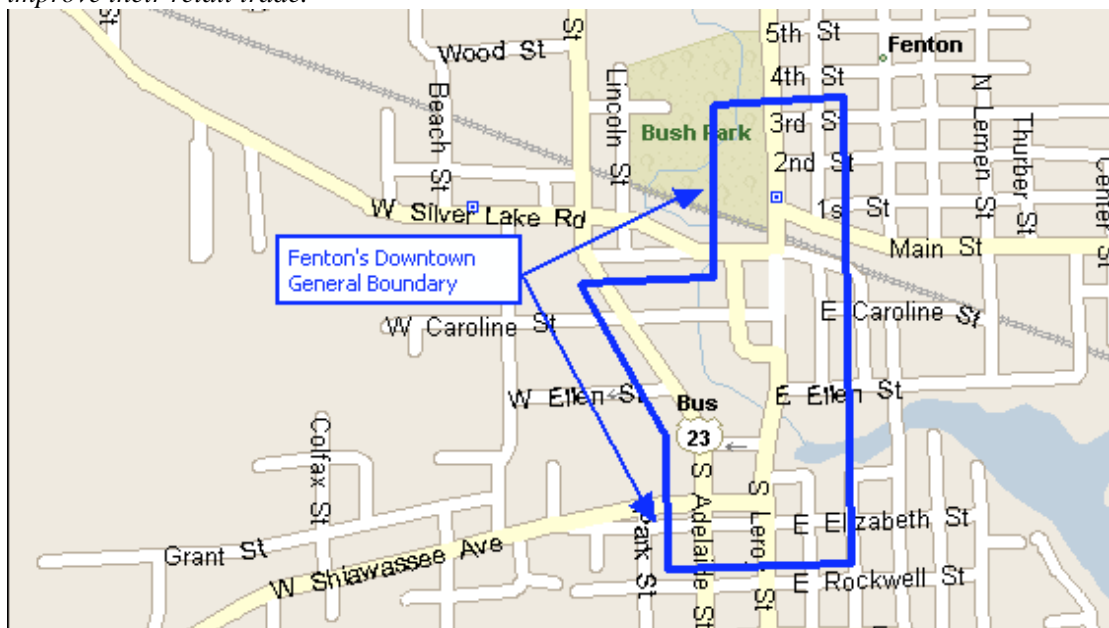


*The French Laundry is a new popular Deli that indicates a large pent up demand for better “hip” businesses in the downtown area.*

Downtown retail currently consists of “independent” retailers that cater to the greater Fenton area. Included in the mix are a quilt shop, gifts/baskets, the Fenton House hotel (restaurant) and some service retail. The existing business mix will benefit from the development of new retailers that don’t directly compete with the retailer’s specialty. One of the newer businesses, The French Laundry (Deli) has been a very popular upscale deli and indicates the large pent-up demand for new quality goods and services in the downtown.



*Historic Fenton’s downtown and Dibbleville are disjointed by the community center, parks, post office and city hall. New mixed-use in-fill buildings could help to connect the two districts and improve their retail trade.*



The exact boundaries of downtown Fenton remains unclear to many. Some residents consider Dibbleville downtown Fenton while others view the area north of City Hall as downtown Fenton. Many residents consider Dibbleville to be outside of downtown Fenton. In reality both areas plus others are actually part of the downtown area. However various areas are disjointed making cross-shopping difficult.



*The Old Fire station is located in the middle of the downtown and Dibbleville, and could become the missing link to connect the two areas. This building with its water front location could be an ideal restaurant.*

Linking the two downtown districts together as well as the adjacent surrounding areas will create a critical mass that could significantly increase the number of shoppers in the down area.





*The most significant competition to the Fenton DDA area is along Miller Road in Flint, which houses the Genesee Valley Mall, as well as a number of other retail centers.*

### ***Other Shopping Areas***

The Fenton DDA will experience moderate competition at the regional level, but the downtown has to compete with other small downtowns such as Brighton, Holly and to a degree Howell. Fenton has the capacity to be a retail focal point for southern Genesee, and northern Oakland and Livingston counties and can use its locational advantages to minimize the impact of surrounding competition.

The dominant regional shopping center in the area is the Genesee Valley Mall, a 1.3 million sf center anchored by JC Penney, Sears, Mervyns and Marshall Fields. The mall opened in 1970 and currently draws from across Genesee County. During discussions with local residents, many of them cited Genesee Valley Mall as their primary regional shopping destination.

Genesee Valley Mall is surrounded by a number of power centers and other retailers. Included in these centers are retailers such as Office Depot, TJ Maxx, MC Sports, Kids “R” Us, Borders, and a number of restaurants and entertainment opportunities. These centers provide additional retail synergy and increase the drawing power of the mall. Other regional shopping centers in the Detroit-Flint area, such as Great Lake Crossing, Twelve Oaks Mall and Summit Place Mall attract only occasional shopping from Fenton area residents due to their distance from Fenton and the easier alternatives around Genesee Valley Mall.

Most of the remaining shopping center competition consists of small neighborhood centers housing small supermarkets and drug stores and convenience-oriented shopping. Included in these are Grand Mall in Grand Blanc, a 139,000 sf neighborhood center anchored by Kroger and HobbyTown. Grand Mall has a published sales per sf of \$125 and advertises rental rates of \$10-31 per sf. Other centers include an older center across from Grand Mall housing small and tired looking Farmer Jack and Kmart units. Similar levels of competition lies the south in Hartland at the intersection of US 23 and M-59. Due to their distance from Fenton and the availability of such shopping opportunities within Fenton, these centers have a limited impact on the study area, but help delimit the primary trade area for Fenton.



*Fenton's specialty shops benefit from Linden's quaint collection of antique, home store and restaurants. Both historic districts create a unique destination that attracts shoppers from over 50 miles.*

Although Fenton will have to compete with other nearby towns for the shopping dollars its unique location at the axis of three growth areas gives it a real advantage. In order to both retain local residents and capture new customers, Fenton will need to create a unique niche for itself.

## **RECOMMENDED RETAIL STRATEGY**

Given that the greater Fenton region will likely be flooded with numerous new retailers and shopping centers, the DDA has an excellent opportunity to plan for and develop one of the state's best collection of quality local and national retailers. However, in today's changing retail climate, it is difficult for a shopping district to be all things to all markets. This study recommends that the DDA consider coordinating the development of the historic downtown and Silver Lake Village as two unique shopping districts.

### **Historic Downtown**



*Fenton's historic downtown is ideally located to be the primary collection of neighborhood goods and services including grocery, cafes and specialty retailers.*

The centrally located historic downtown is ideally located to become the region's leading neighborhood shopping area. Both the downtown area and Dibbleville could be combined to offer a wide range of cafes, restaurants, pharmacy, grocery, specialty bakeries, hardware, florists and retailers offering goods and services needed on a daily basis from the local residents. The neighborhood shops combined with the existing Post Office, City Hall, waterfront park and historic museum can create a destination that will likely attract shoppers from beyond the surrounding neighborhoods and communities.



*Mixed use residential and commercial built at medium density (20-30 units per acre) in the downtown can help to support new retailers and make the downtown a vibrant walkable center.*

This study also concludes that as much as possible, there should be office and residential mixed into the downtown area, with 3-5 level buildings. The new office development will help to support better restaurants and the residential will provide for a more 24-7 walkable community.

The following retail types could help to position the downtown as the region's leading collection of neighborhood shops.

- 4,000 sf women's apparel
- 2,000 sf men's apparel
- 5,000 sf unisex apparel
- 1,500 sf children's apparel
- 8,000 sf quality restaurants
- 8,000 sf family restaurants (without liquor)
- 3,000 sf carry-out food
- 20,000 sf green grocer, such as Wild Oats, Whole Foods or Trader Joe's
- 3,000 sf specialty foods, such as bagels, ice cream or coffee shops
- 3,500 sf bar/tavern
- 2,500 sf appliances/electronics
- 4,500 sf book stores
- 12,500 sf drug stores
- 2,500 sf health/beauty, such as vitamins
- 1,600 sf laundry/dry cleaning



- 2,000 sf personal services, such as a salon, weight loss or tanning
- 3,000 sf toy/hobby
- 2,000 sf service retail
- 5,000 sf entertainment/recreation, such as dance, martial arts, fitness

### Silver Lake Village



*As national fashion, lifestyle or big box retailers seek the Fenton-Grand Blanc market, Silver Lake Village area offers an excellent potential location.*

Already an established successful regional shopping destination, Silver Lake Village is likely to continue to attract new leading retailers. This study recommends that major anchor commercial tenants be encouraged to locate in the Silver Lake area. In addition, should new fashion and lifestyle tenants seek a location in the Grand Blanc-Fenton area, parts of the Silver Lake Village or adjacent underutilized sites may be considered. The recently opened Village of Rochester Hills (former Meadowbrook Mall) represents an example of a new lifestyle center built at the site of an existing shopping mall.

Any additions to Silver Lake Village should be designed as an open-air, town center format with storefront parking, sidewalks with attractive landscaping and lighting. Ideally, there will be more than one story buildings with ground floor retail and office and/or residential above. While this may be difficult to fit into new mixed-use growth at Silver Lake Village, every effort should be made to accommodate a *new urban* format, to control suburban sprawl in the region.

Of the potential total 750,000 sf of supportable retail in Fenton, this study recommends that 650,000 sf (88% of the total) is likely to be located along the U.S. 23 - Silver Lake Village area.



- 250,000 sf department stores, such as Sears Grand, Parisian
- 85,000 sf junior department stores, such as Kohl's
- 110,000 sf discount department stores
- 125,000 sf warehouse clubs
- 6,000 sf women's apparel
- 4,000 sf men's apparel
- 20,000 sf unisex apparel
- 1,000 sf men's shoes
- 1,800 sf ladies shoes
- 1,500 sf athletic shoes
- 1,000 sf shoes/accessories
- 10,000 sf quality restaurants (serving liquor)
- 2,000 sf fast food, such as a deli
- 2,500 sf appliances/electronics
- 2,500 sf gas/convenience
- 1,800 sf copying/printing
- 14,000 sf dollar/variety, such as Tuesday Morning
- 8,500 sf furniture
- 4,500 sf home furnishings
- 3,000 sf music stores
- 5,000 sf sporting goods
- 2,500 sf service retail, such as travel agents, investments, insurance

In either location, Silver Lake Village or downtown, shop owners within the town center will need to operate in a sound, proven manner. Store hours must be convenient for the customers, not the owner, or people will shop elsewhere. Store fronts should be tastefully decorated and well maintained, including cleaning the glass twice daily and repainting no less than once a year. Attractive landscaping is also a plus.

### ***Rationale***

The results of this analysis are reflective of the following factors:

1. ***Fenton is located along a significant north-south corridor in southeast Michigan.*** U.S. 23 is a rapidly growing corridor which connects Flint to Ann Arbor and Toledo. It is quickly becoming a major commuting corridor for the Detroit area.
2. ***Housing and population growth is projected to be very strong,*** a vital factor in retail development. Population growth will enhance sales performance for retailers and ensure their longevity, especially as Fenton continues its development as a bedroom community for Flint and Detroit.

3. ***Income levels are currently good***, as are other important demographic characteristics, such as educational levels, median age and population growth.
4. ***Fenton already has a number of amenities, including*** the Shiawassee River, existing historic buildings and a small-town charm. However, some of the existing space is underutilized, detracting from the overall feel of the town.
5. ***Fenton is within an easy drive of several major metropolitan areas***, including Flint, Brighton, Ann Arbor, Lansing and northwestern Detroit, giving it a large population base to draw from.
6. ***Fenton went through some past “urban renewal”*** which unfortunately resulted in the destruction of some historic buildings and a disjointed feel to the downtown area. However, with proper planning, this obstacle can be overcome.

## IMPLEMENTAION OPTIONS

Even with strong market, it is unlikely that downtown Fenton will reach its full market potential on its own. Suburban “*Greenfield*” locations are easier and more attractive than in-fill downtowns to most commercial developers. Should the community elect to attract significant amounts of quality mixed-use growth in both the downtown and Silver Lake area, it has two primary options.



*Seattle recently opened this new mixed-use grocery store and residential development in one of its small neighborhoods to improve the quality of life for its residents.*

*Option One:* Implement a new master plan and overlay zoning code that gives additional density and development rights to existing under-utilized sites. The height and density bonuses would be in exchange for high building and development standards. Many cities using this method have seen significant amounts of growth in a short time period including: Birmingham, Howell, Naples Florida, and Northville. *Option Two:* The DDA or equal would assemble ownership or long-term leases for key parcels that represent a primary public interest. These assemble sites could be planned and qualified developers sought to co-build the new urban in-fill buildings.

Both implementation options will require a significant amount of planning, coordination risk and vision. It is likely that major new infrastructure investment will be required including parking garages, utility upgrades and road improvements. However, the long term rewards are potentially unlimited.

## END OF REPORT

### **Fenton, Michigan Focus Group Notes**

June 24, 2003



*Many focus group members expressed a desire for Fenton's downtown areas to have a more diverse selection of restaurant and small shops.*

The following represents outline notes of focus group sessions on June 24, 2003 by Gibbs Planning Group at the City of Fenton City Hall. These group sizes ranged from 3-8 members each and were held for GPG to gain an informal observation of shopping trends and desires of the Fenton Community.

### ***Group 1 – City Staff***

***Parks:*** Safety and Security was discussed. It was noted that vandalism of the park and gazebo has lessened since security was added. Bush Park has security issues, mostly vandalism, not really violent crimes. Other issues discussed:

- Funding could be improved for maintenance of city parks and public spaces.
- They would like an outdoor ice arena, possibly in Bush Park. Concept plan is there but lack funding.
- Don't see t
- he need for a tot lot as the schools have large play areas.
- Concerts at the gazebo – Start in June and run every Thursday through August. Usually get 300-500 people at each. People come from Flint, Swartz Creek and Linden, as well as Fenton.
- The City hosts a successful Farmers Market in August.
- Are starting up a “*Taste of Fenton*” festival – currently draws from about a 10 Mile radius.

### ***Fenton Focus Groups***

### ***Development:***

- Most housing development recently has been multi-family units. Includes Orchard Hills Phase II (80 condos), Eagles on the Waters Edge coming online slowly – getting 300-400 units a year. When economy dropped building stopped. It is starting to come back but slowly.
- Houses are selling in the \$140 -220,000 range. Very few lake properties and few homes over \$300,000. Most homebuyers are moving in from Oakland and Wayne Counties but some from Washtenaw.
- Locals think traffic is getting bad.

### ***Citizen and Retailer Complaints:***

- Traffic and traffic patterns. Too much traffic and not enough flow.
- Retailers want additional signs and do not want handicapped spaces in front of their stores.
- Parking is an issue, especially during special events.
- Retailers want the ability to display merchandise on the sidewalks.
- There have been complaints about the turnaround time for permits. To renovate an existing building, if there are no changes to the plan, it is a 30-60 day process. This is slower than surrounding areas but not as bad as places like Novi and Birmingham.
- Taxes are good compared to surrounding areas. They are third lowest in the county for cities.

- Most of the tax revenues from the Silver Lake Village goes to the DDA – approximately a half million dollars annually (14% of total operating budget). Downtown businesses contribute 1-2% of the DDA's operating budget.
  - People want to see more restaurants and cafes. There is not a lot of outdoor dining and people would like more.
  - Old fire station is not being used for anything.
  - They need 2 more fire stations – one in Silver Lake Village area and one on the other side of the tracks to service both sides of the city. Most of the fire calls are to the senior facilities.
  - Most accidents are at Silver Lake Road and US 23.
  - There are several large developments coming on Grange Hall Road.
  - Many people think Fenton is a great place to live but there is nothing to do. "Didn't know Fenton existed until I moved here" is echoed a lot. Not much to draw people in.
  - To try to deal with this, they had considered options like a skate park, but they can't decide where to put it, who will fund it and how to deal with the liability.
  - Quality of life is good but need stuff for kids.
  - It is hard to get a tavern because of the number of churches and there are distance restrictions.
  - City needs some architectural guidelines. DDA needs to throw some resources into redevelopment.
- 
- There are concerns about developing on Leroy as this would take visibility from businesses on Walnut. They want to consider town-homes. However, no one currently can afford the assembly of the properties. In addition, people already live above the shops.
  - Something like Howell Town Commons would be great.
  - Shopping – People go to 12 Oaks more than Genessee Valley because they feel safer there. It is hard to buy clothes in Fenton. Elder-Beerman was supposed to move in but it didn't happen.
  - Would like to see a Mexican restaurant, mid-price places. Want eating places in a range between Applebee's and the hotel. Want sandwiches and reasonable prices. Fenton Hotel used to be open for lunch but was too expensive. Need quicker service and better priced.
  - Want a "burger and beer" place.
  - The only coffee place is the French Laundry, but it closes at 4 PM. A hot dog wagon would be good.
  - General feeling/observation that if the land was cleared and at market rate, developers would be lining up to buy and develop, but assemblage is expensive.
  - People occasionally go to Linden but mostly to dine. Many of the people in the Fenton area are new and don't know about Linden.

***Group 2 – Business Owners, Community Center and Chamber of Commerce***

- ***Camera Shop*** is looking to expand store to include on-site film development. Shop was here since 1947. Present owner bought the store 2 years ago. Sales are



going up slightly every year. After 9/11 more people were fixing cameras instead of buying new but camera sales are back up. He has lived in Fenton all his life.

- **Specialty Shop:** It was initially just a basket shop but people wanted stuff to put into them. She sells a lot of Michigan products. She has been at her current location 6 years. She says the building next door to her has prime retail space that is being used for storage. She gets a lot of residual business from the shoe store, hair cut traffic and the camera store. She has a UPS store in her shop. Her usual basket is between \$40 and \$100 and much if her business is done around Christmas. She gets a lot of out of towners.
- **Book Store** is around 3,600 sf. And considering moving downtown, but the expressway is important for business. Have a good inside connection with the Coffee Beanery next door.
- **Chamber** has about 375 members, including members from Hartland, Grand Blanc and other nearby areas. National chains only buy a membership when they first come to town.
- **Jewelers Store:** The business started in the lobby of a theatre in Flint in 1932. They just bought the State Bank Building for their business as they wanted to own instead of rent as rents are getting out of control. The majority of customers come from Fenton, Holly and Linden. They get some customers from the Upper Peninsula and out of state due to the excellence of their repair services. They also do antique clock repair. They have been in business in Fenton since 1982 and sales have increased steadily every year.
- **Community Center:** has aerobics, wedding receptions (booked every weekend from May to August). Accommodates 300 people with no dance floor, 250 with a dance floor. There is a stage that can house plays for an audience up to 400 people, but it hasn't been used in years. Would like to see more senior groups, kids art classes, school age art show. Would like to display historic Fenton memorabilia. Community Center is mostly local clientele. Budget is \$100,000, with 60% coming from sources such as the Rockham Foundation Endowment and 40% from rentals. Center has a kitchen but renters must supply a caterer. Building needs some minor repair (painting, etc). A nice exhibit would attract more people to Fenton.

#### **General Comments/Concerns:**

- Need more parking and parking enforcement. People park illegally and never get a ticket.
- Where is downtown Fenton? Is it Dibbelville or the north part? Both? Dibbelville was old part.
- Group was split on whether Dibbelville and north section should be one or separate. Most felt should be one and should include grain elevator and Fenton Hotel.
- Would like to see east side of Leroy updated. Make them blend in with downtown and bring back the character. Opening the street helped.
- The 4<sup>th</sup> of July attracts everyone. There is a lot of loyalty to the city. During celebration can't even walk on the sidewalk there are so many people.

- Everyone wants someone else to be there first, but someone needs to make the first move.
- Want a lower cost restaurant with liquor, such as Chili's, but not a chain. Don't want a chain in downtown, want them in Silver Lake Village, unless they will go into the old buildings and keep the historic look.
- Need clothing and shoes.
- If upscale retail is developed well it could go into downtown.
- They like the Village of Rochester Hills (former Meadow Brook Mall) concept. Need multiple restaurants.
- Do some shopping at Genessee Valley Mall but 12 Oaks and Great Lakes Crossing more, due to safety issues. Most Fenton residents go to Flint about once a week to Miller Road.
- They don't really see a lot of extra business from the concerts.
- Would like to turn the old fire station into a restaurant. City may be able to lease it for this or some other purpose.
- Would like to see an ice cream and coffee shops and for them to be open during concerts.

### ***Group 3 – General Citizens***

- Not enough for kids to do, should have activities like a skate park, etc. There are enough restaurants, need shoe stores – older people can't shop at Payless.
- Bakery (French Laundry) too expensive
- Transportation can be a problem – would like a taxi or bus from Dibbelville to Silver Lake Village. Go to Kmart and Wal-Mart but would like a Target. Older population cannot get to Flint.
- Would like a Whole Foods or a Wild Oats, some kind of green grocer.
- Want a cultural center, performing arts concerts, etc.
- Younger people do not plan to stay in Fenton. May move back later in life when they want to settle.
- People like living in downtown – can walk to library, post office, etc.
- Downtown used to be nice and used to have places for kids to gather (malt shops, etc).
- Want to have a place where house bands can play, a teen club – would give the kids something to do. This would attract kids from Holly and Linden. Community Center is too expensive to rent out. Need more for the 16-18 year old crowd.
- There is a rumor about Farmer Jack pulling out. Want to keep a grocery store on the north end.
- State Bank goes to Donner House once a month to cash checks etc, saving residents a trip out to do this.

- Younger people shop in Flint when they need something quick but go to Novi to shop more often. Shop at American Eagle Outfitters, Forever 21, Aeropostale and JC Penney.
- Older people wish for the town the way it used to be (1930s). City need to pay more attention to what people want and what they ask for. Don't need more residents and businesses. It was best before the war, had ice cream, Kirky's shoes, etc., drug stores.
- Sorry to see little boutiques closing up.
- Need more parking. Feel Dibbelville and "downtown" are separate places.
- Can only walk to 2 or 3 restaurants.
- Want stuff to do, clean beaches, park. Go to beach but don't go into water, bathrooms are disgusting – can't lock bathroom doors because they are so badly vandalized.

#### ***Group 4 – City Council***

- What do people want? Do not want more pizza places. Do not want buildings in front buildings that are already there. Do not want it to be right up to the street.
- Want a Bread bakery and small food stores.
- Outdoor seating at restaurants should be encouraged.
- Want wider sidewalks in the downtown and some neighborhoods. Want to be like a small scaled Savannah, Georgia.

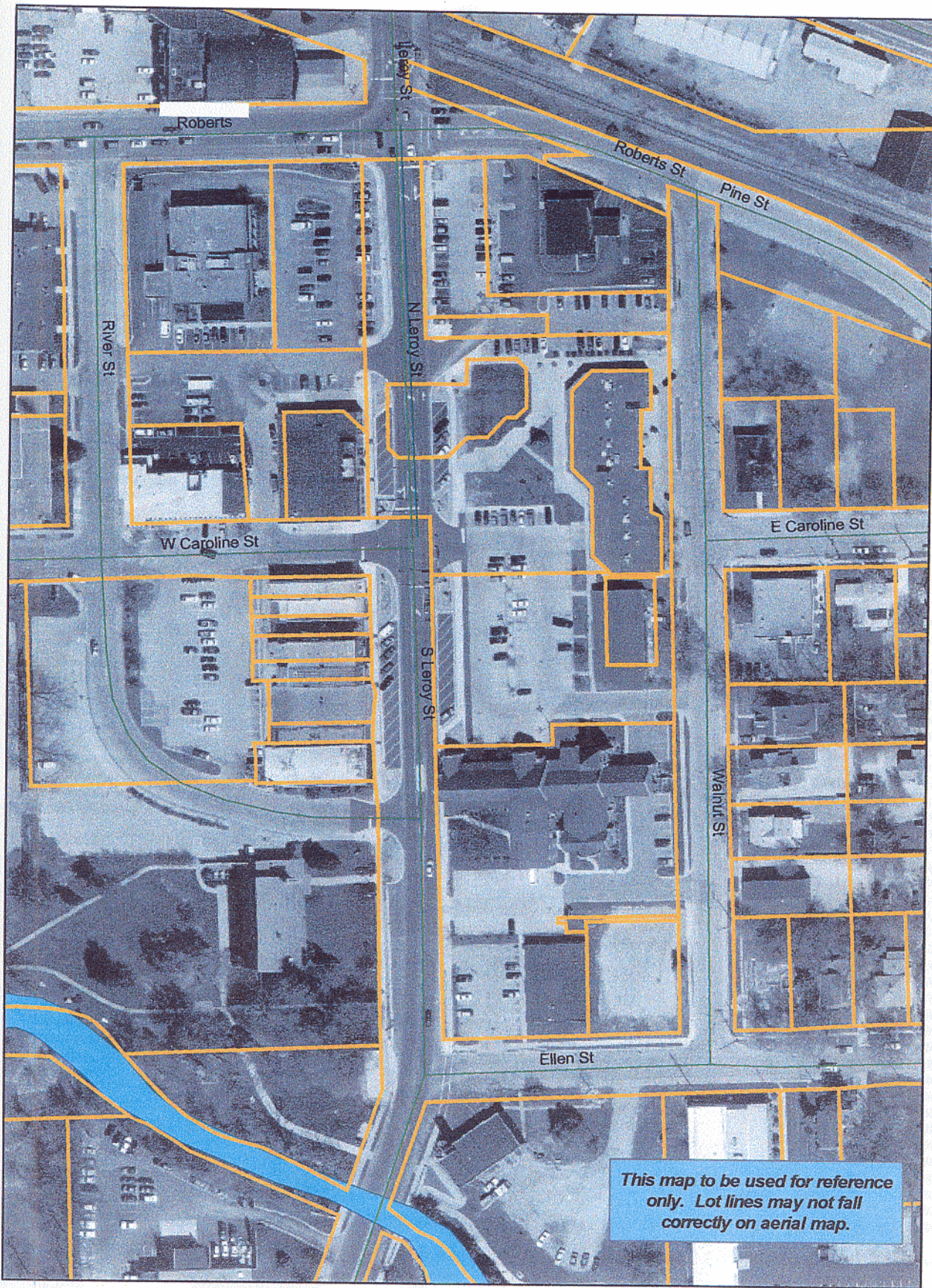
#### ***Group 4 – City Council (Cont.)***

- People relate to the French Laundry is good for the community.
- Things are done and then not maintained – start things and don't and don't finish
- Traffic is a problem in the entire area.
- Not a lot to come downtown for except for special events.
- Not a lot of cohesiveness downtown ie the several districts.
- Need more buildings, more space for people to open businesses
- Don't have businesses due to lack of supply not demand
- Lot of people here do not shop at quaint little shops
- Stores need to stay open later but there are not enough of them
- Need people 24/7 to survive
- People would come downtown to shop if they had a reason to
- Many members liked Howell, Brighton, downtown Rochester and Northville.
- How do we get to what people want to shop at?
- Have a lot of things (restaurants, butcher shops) that didn't make it
- Traffic has increased with Silver Lake Village – Will adding retail in the downtown will only increase traffic? Or will it help to reduce traffic trips.
- Need to make downtown the center of the community but not necessarily the business center – it can be a cultural/community center
- Make fire station a nice restaurant and small shops.
- Want to be able to get out and walk to shops and restaurants.
- A movie theater, mix of uses would be great.

- Need clothing stores in downtown area.
- Community needs a small grocery store, have to get into car to get milk and bread and go to VG's or Farmer Jack at Silver Lake Village
- Looked at cultural center at Lincoln Street near Bush Park
- Can't try to compete with Silver Lake Village.
- Want a place that reminds them of what Fenton was like 50-60 years ago.
- Would a kitchen store with a cooking class work?
- Should Farmer's Market expand? Or should it be a public market with permanent vendors.

*Fenton Focus Groups*





City of Fenton  
301 S. Leroy St.  
Fenton, Michigan 48430

(810) 629-2261 fax (810) 629-2004

## Downtown Parcel Line/Aerial Map



0 75 150 300 Feet



**Sales Forecast Table  
Proposed Retail Development  
Fenton, Michigan**

<u>Category</u>	<u>2003 Expenditure Potential</u>	<u>2003 Supportable Sq. Ft.</u>	<u>2003 Estimated Sales</u>	<u>2003 Estimated Sales Per Sq. Ft.</u>	<u>2008 Expenditure Potential</u>	<u>2008 Supportable Sq. Ft.</u>	<u>2008 Estimated Sales</u>	<u>2008 Estimated Sales Per Sq. Ft.</u>	<u>2003-2008 Total Supportable Sq. Ft.</u>
Department Stores	\$987,297,261	150,000	\$20,850,000	\$139	\$1,200,137,298	100,000	\$17,095,247	\$171	250,000
Junior Department Store	\$480,555,838	85,000	\$13,068,750	\$154	\$584,153,333	0	\$0	\$0	85,000
Discount Department Stores	\$562,144,035	0	\$0	\$0	\$683,330,188	110,000	\$23,157,602	\$211	110,000
Warehouse Club	\$929,738,131	125,000	\$21,396,875	\$171	\$1,077,821,311	0	\$0	\$0	125,000
<b>Total Department Stores</b>	<b>\$2,959,735,265</b>	<b>360,000</b>	<b>\$55,315,625</b>	<b>\$0</b>	<b>\$3,545,442,131</b>	<b>210,000</b>	<b>\$40,252,849</b>	<b>\$192</b>	<b>570,000</b>
Women's Apparel	\$190,219,956	5,000	\$1,360,000	\$272	\$231,227,284	5,000	\$1,672,628	\$335	10,000
Men's Apparel	\$81,822,076	2,000	\$556,000	\$278	\$99,461,154	4,000	\$1,367,620	\$342	6,000
Unisex Apparel	\$366,170,178	15,000	\$4,350,000	\$290	\$445,108,587	10,000	\$3,566,634	\$357	25,000
Children's Apparel	\$34,679,724	0	\$0	\$0	\$42,155,926	1,500	\$575,581	\$384	1,500
Men's Shoes	\$18,720,500	0	\$0	\$0	\$22,756,237	1,000	\$585,420	\$585	1,000
Women's Shoes	\$28,314,381	0	\$0	\$0	\$34,418,351	1,800	\$850,089	\$472	1,800
Athletic Shoes	\$31,142,586	1,500	\$459,000	\$306	\$37,856,257	0	\$0	\$0	1,500
Shoes and Accessories	\$61,603,908	0	\$0	\$0	\$74,884,385	1,000	\$757,602	\$758	1,000
<b>Total Apparel/Accessories</b>	<b>\$812,673,309</b>	<b>23,500</b>	<b>\$6,725,000</b>	<b>\$286</b>	<b>\$987,868,182</b>	<b>24,300</b>	<b>\$9,375,574</b>	<b>\$386</b>	<b>47,800</b>
Quality Restaurants	\$314,684,203	10,000	\$3,460,000	\$346	\$382,523,344	8,000	\$3,404,291	\$426	18,000
Family Restaurants	\$258,466,426	4,500	\$1,237,500	\$275	\$314,186,224	3,500	\$1,183,754	\$338	8,000
Fast Food Restaurants	\$279,331,869	3,000	\$1,356,000	\$452	\$339,549,807	2,000	\$1,111,806	\$556	5,000
Grocery Stores	\$782,187,034	20,000	\$16,240,000	\$812	\$950,809,722	0	\$0	\$0	20,000
Specialty Food Stores	\$11,990,462	1,600	\$611,200	\$382	\$14,575,348	1,400	\$657,737	\$470	3,000
Liquor Stores	\$80,872,107	0	\$0	\$0	\$98,306,392	0	\$0	\$0	0
Bar/cafes	\$31,470,707	0	\$0	\$0	\$38,255,114	3,500	\$473,501	\$135	3,500
<b>Total Food</b>	<b>\$1,759,002,808</b>	<b>39,100</b>	<b>\$22,904,700</b>	<b>\$586</b>	<b>\$2,138,205,951</b>	<b>18,400</b>	<b>\$6,831,088</b>	<b>\$371</b>	<b>57,500</b>
Appliances/Electronics	\$268,792,707	2,500	\$715,000	\$286	\$326,738,629	2,500	\$879,360	\$352	5,000
Art, Craft & Sewing Stores	\$9,408,687	0	\$0	\$0	\$11,436,997	0	\$0	\$0	0
Auto Supply Stores	\$164,607,833	0	\$0	\$0	\$200,093,738	0	\$0	\$0	0
Book Stores	\$37,888,101	0	\$0	\$0	\$46,055,960	4,500	\$1,195,437	\$266	4,500
Card/Gift Shops	\$47,558,948	0	\$0	\$0	\$57,811,634	0	\$0	\$0	0
Computers & Accessories	\$80,723,612	0	\$0	\$0	\$98,125,885	0	\$0	\$0	0
Convenience Stores	\$412,445,644	0	\$0	\$0	\$501,360,046	2,500	\$1,438,952	\$576	2,500
Copying/Printing	\$0	0	\$0	\$0	\$0	1,800	\$551,395	\$306	1,800
Dollar Store/Variety	\$0	14,000	\$1,932,000	\$138	\$0	0	\$551,395	\$0	14,000
Drug Store/Pharmaceutical	\$311,900,741	0	\$0	\$0	\$379,139,828	12,500	\$4,704,268	\$376	12,500
Florists	\$21,937,204	0	\$0	\$0	\$26,666,394	0	\$0	\$0	0
Furniture Stores	\$153,490,069	0	\$0	\$0	\$186,579,225	8,500	\$2,676,206	\$315	8,500
Hardware	\$68,878,742	0	\$0	\$0	\$83,727,516	0	\$0	\$0	0
Health & Beauty Stores	\$61,958,397	0	\$0	\$0	\$75,315,294	2,500	\$940,854	\$376	2,500
Home Furnishings Stores	\$134,959,656	0	\$0	\$0	\$164,054,052	4,500	\$1,416,815	\$315	4,500
Home Improvement	\$596,717,545	0	\$0	\$0	\$725,357,003	0	\$0	\$0	0
Jewelry Stores	\$89,461,572	0	\$0	\$0	\$108,747,561	0	\$0	\$0	0
Laundry/Dry Cleaning	\$37,582,715	0	\$0	\$0	\$45,684,739	1,600	\$259,749	\$162	1,600
Luggage Shops	\$4,705,312	0	\$0	\$0	\$5,719,676	0	\$0	\$0	0
Mailing/Packaging	\$0	0	\$0	\$0	\$0	0	\$0	\$0	0
Medical Supply Stores	\$0	0	\$0	\$0	\$0	0	\$0	\$0	0
Movie Theatres	\$0	0	\$0	\$0	\$0	0	\$0	\$0	0
Musio Stores	\$33,316,283	3,000	\$876,375	\$292	\$40,498,557	0	\$0	\$0	3,000
Musical Instrument Shops	\$10,286,499	0	\$0	\$0	\$12,504,047	0	\$0	\$0	0
Office Supply Stores	\$55,406,541	0	\$0	\$0	\$67,350,999	0	\$0	\$0	0
Optical/Vision Care	\$25,714,044	0	\$0	\$0	\$31,257,439	0	\$0	\$0	0
Personal Services	\$61,958,397	1,000	\$162,975	\$163	\$75,315,294	1,000	\$200,439	\$200	2,000
Pet Supply Store	\$34,493,486	0	\$0	\$0	\$41,929,539	0	\$0	\$0	0
Photographic Supply Shop	\$5,206,379	0	\$0	\$0	\$6,328,762	0	\$0	\$0	0
Shoe Repair and Service	\$889,845	0	\$0	\$0	\$1,081,677	0	\$0	\$0	0
Sporting Goods Stores	\$102,587,321	5,000	\$2,167,875	\$434	\$124,702,939	0	\$0	\$0	5,000
Tobacco Shop	\$72,170,083	0	\$0	\$0	\$87,728,399	0	\$0	\$0	0
Toy & Hobby Shops	\$47,551,672	3,000	\$255,000	\$85	\$57,802,789	0	\$0	\$0	3,000
Video/Entertainment	\$7,165,428	0	\$0	\$0	\$8,710,141	0	\$0	\$0	0
<b>Total Other Retail</b>	<b>\$1,938,337,933</b>	<b>28,500</b>	<b>\$6,109,225</b>	<b>\$214</b>	<b>\$3,597,824,759</b>	<b>41,900</b>	<b>\$14,814,870</b>	<b>\$354</b>	<b>70,400</b>
<b>Total Retail</b>	<b>\$7,469,749,315</b>	<b>451,100</b>	<b>\$91,054,550</b>	<b>\$202</b>	<b>\$10,269,341,024</b>	<b>294,600</b>	<b>\$71,274,382</b>	<b>\$242</b>	<b>745,700</b>
Other Retail	Entertainment/Recreation	5,000							
	Service Retail	4,500							
	Total Other Retail	9,500							
<b>Total Retail</b>		<b>755,200</b>							

\*\* includes only those retailers/centers considered to be competition to the study site.

**SHOPPING CENTER COMPETITION  
RETAIL FEASIBILITY STUDY  
FENTON DDA; FENTON, MICHIGAN**

Map Code	Name/Location	Estimated Gross Size (sq. ft.)	Anchor Tenants Name	Number of Non-anchor Tenants	Number of Vacancies	Comments
A	Genesee Valley Mall Miller Road/Linden Road Flint, Michigan	1.3 million	Sears, JC Penney, Mervyn's, Marshall Fields	152	16	Major regional mall for Flint area. Regularly attracts Fenton area residents. Heavy traffic.
B	Unnamed Center Miller Road/Linden Road Flint, Michigan	N/A	Borders, Sports Authority, Circuit City, PETSMART	1	0	Power center benefiting heavy traffic near Genesee Valley Mall. Moderate traffic volumes.
C	Unnamed Center Linden Road/ Miller Road Flint, Michigan	N/A	Toys "R" Us, Babies "R" Us, Furniture Express	4	0	Power center proximate to the mal. Moderate to heavy traffic.
D	Wal-Mart Silver Lake Village Owen Road/US 23 Fenton Michigan	135,000			0	Part of Silver Lake Village. Heavy traffic volumes.
E	Silver Point Silver Lake Village Owen Road/US 23 Fenton, Michigan	N/A	Sears Hardware, Kmart, VG's	30	1	Part of Silver Lake Village. Moderate to heavy traffic.
F	Fenton Village Marketplace Silver Lake Village US 23/Silver Lake Road Fenton, Michigan	97,229	Farmer Jack, Michaels	12	0	Newer center - part of Silver Lake Village. Moderate to heavy traffic.
G	Ketzler Crossing Miller Road/Ketzler Street Flint, Michigan	N/A	Jo-Ann ETC, Bed Bath & Beyond, Burlington Coat Factory, Great Party!, Target	11	2	Good super-community center with relatively heavy traffic.

Exhibit B

H	Farmer Jack Center Saginaw Road/Holly Road Grand Blanc, Michigan	79,000	Farmer Jack, Rite Aid, Kmart		0	Old center with very light traffic volumes. In definite need of renovation.
I	Grand Mall Saginaw Road/Holly Road Grand Blanc, Michigan	139,000	Kroger	28	2	Neighborhood center with Ace Hardware and HobbyTown among the co-tenants.
J	Oak Brook Square Miller Road/Linden Road Flint, Michigan	140,217	TJ Maxx, Kids "R" Us, MC Sports	19	5	Moderately strong community center.
K	Alpine Center Broad Street/Hyatt Street Linden, Michigan	N/A	Alpine Foods, Rite Aid	3	0	Small neighborhood center providing convenience advantage to Linden residents.
L	Valley Plaza Miller Road/Linden Road Flint, Michigan	N/A	Imagination Station	24	2	Small center with moderate traffic.
M	Farmer Jack Center M-59/US 23 Hartland, Michigan	N/A	Farmer Jack, CVS	12	1	Neighborhood center convenient to Hartland and northern Brighton. Light to moderate traffic.
N	Hartland Town Center M-59/US 23 Hartland, Michigan	N/A		8	1	Small neighborhood center serving Hartland. Furniture store going out of business. Light traffic.
O	Hartland Plaza M-59/US 23 Hartland, Michigan	N/A	None	11	4	Grocery store now vacant. Old, dilapidated center with little traffic.
P	Holly Plaza Holly Road/Holly Hills Holly, Michigan	N/A	Freeman's Supermarket, CVS	8	1	Small neighborhood center serving Holly area. Moderate traffic.
Q	Monticello Plaza Linden Road/Hill Road Fenton Township, Michigan	N/A		11	0	Small convenience and service-oriented center with very little traffic.
R	Classic Corner Silver Lake Road/US 23 Fenton, Michigan	N/A		7	0	Small convenience center with moderate traffic.
S	Unnamed Center Silver Lake Road/US 23 Fenton, Michigan	N/A		8	2	Newer center not fully leased. Moderate traffic.

T	Jay's Silver Square Silver Lake Road/US 23 Fenton, Michigan	N/A	None	5	0	Small center with light traffic.
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**Demographic Comparison Report**  
**Fenton DDA; Fenton, Michigan**

		<u>Primary Trade Area Summary</u>	<u>Secondary Trade Area Summary</u>	<u>Total Trade Area Summary</u>		
Population:	2008 Total	87,773	322,094	409,867		
	2003 Total	83,045	314,559	397,604		
	2000 Total	81,197	311,677	392,874		
	1990 Total	65,617	296,573	362,190		
	% Change 2000-03	2.3%	0.9%	1.2%		
	% Change 90-2000	23.7%	5.1%	8.5%		
Households:	2008 Total	34,461	124,075	158,536		
	2003 Total	31,846	119,954	151,800		
	2000 Total	30,848	118,403	149,251		
	1990 Total	23,544	110,151	133,695		
	% Change 90-03	3.2%	1.3%	1.7%		
	% Change 90-2000	31.0%	7.5%	11.6%		
Ave HH Size:	2008	2.52	2.56	2.55		
	2003	2.58	2.58	2.58		
	2000	2.60	2.60	2.60		
2002 Group Qtrs Population		919	4,428	5,347		
Families:	2008 Total	24,621	84,390	109,011		
	2003 Total	23,151	82,662	105,813		
	2000 Total	22,573	82,284	104,857		
	% Change 2000-2003	2.6%	0.5%	0.9%		
Housing Units:	2008 Total	36,499*	134,994	171,493		
	2003 Total	33,719	130,592	164,311		
	2000 Total	32,656	128,945	161,601		
2003 Pop by Race:		83,046	314,549	397,595		
	White (not Hispanic)	78,567	233,658	312,225	74.3%	78.5%
	Black (not Hispanic)	1,794	67,063	68,857	21.3%	17.3%
	Asian (not Hispanic)	833	2,869	3,702	0.9%	0.9%
	All Other (not Hispanic)	1,852	10,959	12,811	3.5%	3.2%
	Hispanic Origin	1,403	7,072	8,475	2.2%	2.1%
2003 Pop by Age:		83,045	314,559	397,604		
	Under 5 Years	5,485	23,431	28,916	7.4%	7.3%
	5 to 9 Years	5,794	25,550	31,344	8.1%	7.9%
	10 to 14 Years	6,397	25,481	31,878	8.1%	8.0%
	15 to 19 Years	5,550	22,600	28,150	7.2%	7.1%
	20 to 24 Years	4,109	19,167	23,276	6.1%	5.9%
	25 to 34 Years	10,734	42,352	53,086	13.5%	13.4%
	35 to 44 Years	14,383	50,770	65,153	16.1%	16.4%
	45 to 54 Years	13,267	45,203	58,470	14.4%	14.7%
	55 to 59 Years	5,112	16,209	21,321	5.2%	5.4%
	60 to 64 Years	3,428	11,761	15,189	3.7%	3.8%
	65 to 74 Years	4,866	17,329	22,195	5.5%	5.6%
	75 to 84 Years	2,864	10,867	13,731	3.5%	3.5%
	85 Years and Over	1,087	3,733	4,820	1.2%	1.2%
	Median Age (in Years)	37.5	34.7	35.3		



**Demographic Comparison Report**  
**Fenton DDA; Fenton, Michigan**

	<u>Primary Trade Area Summary</u>		<u>Secondary Trade Area Summary</u>		<u>Total Trade Area Summary</u>	
2003 Households by Age:	31,848		119,958		151,806	
15 to 24 Years	1,193	3.7%	6,174	5.1%	7,367	4.9%
25 to 34 Years	5,029	15.8%	20,750	17.3%	25,779	17.0%
35 to 44 Years	7,716	24.2%	27,951	23.3%	35,667	23.5%
45 to 54 Years	7,519	23.6%	26,580	22.2%	34,099	22.5%
55 to 64 Years	5,006	15.7%	17,310	14.4%	22,316	14.7%
65 to 74 Years	3,070	9.6%	11,450	9.5%	14,520	9.6%
75 Years and Over	2,315	7.3%	9,743	8.1%	12,058	7.9%
Per Capita Inc.: 2003	\$31,754		\$24,624		\$26,113	
1989 (Census)	\$17,416		\$13,662		\$14,438	
% Change 89-02	82.3%		80.2%		80.9%	
Ave. Hhold Inc.: 2003	\$80,510		\$62,983		\$66,660	
1989 (Census)	\$48,450		\$36,489		\$38,961	
% Change 89-02	66.2%		72.6%		71.1%	
Med Hhold Inc.: 2003	\$67,956		\$52,670		\$55,877	
1989 (Census)	\$42,909		\$31,288		\$33,690	
% Change 89-02	58.4%		68.3%		65.9%	
Med. Fam. Hhold Inc.:						
2003	\$78,091		\$63,583		\$66,627	
1989 (Census)	\$48,208		\$38,317		\$40,361	
% Change 89-02	62.0%		65.9%		65.1%	
2003 Average Household Wealth	\$252,559		\$204,069		\$214,242	
2003 Median Household Wealth	\$166,706		\$116,049		\$126,519	
2003 Households by Hhold Income:	31,851		119,933		151,784	
Under \$15,000	2,145	6.7%	17,056	14.2%	19,201	12.7%
\$ 15,000 to \$ 24,999	2,592	8.1%	13,220	11.0%	15,812	10.4%
\$ 25,000 to \$ 34,999	2,601	8.2%	11,735	9.8%	14,336	9.4%
\$ 35,000 to \$ 49,999	3,488	11.0%	14,945	12.5%	18,433	12.1%
\$ 50,000 to \$ 74,999	7,169	22.5%	25,395	21.2%	32,564	21.5%
\$ 75,000 to \$ 99,999	5,588	17.5%	17,027	14.2%	22,615	14.9%
\$ 100,000 to \$ 149,999	5,200	16.3%	13,620	11.4%	18,820	12.4%
\$ 150,000 to \$ 249,999	2,655	8.3%	5,812	4.8%	8,467	5.6%
\$250,000 to \$499,999	283	0.9%	869	0.7%	1,152	0.8%
\$500,000 and Over	130	0.4%	254	0.2%	384	0.3%
2003 Fam. Hholds by Fam. Hhold Inc.:	23,151		82,662		105,813	
Under \$15,000	730	3.2%	8,003	9.7%	8,733	8.3%
\$ 15,000 to \$ 24,999	1,233	5.3%	6,838	8.3%	8,071	7.6%
\$ 25,000 to \$ 34,999	1,560	6.7%	7,052	8.5%	8,612	8.1%
\$ 35,000 to \$ 49,999	2,315	10.0%	9,828	11.9%	12,143	11.5%
\$ 50,000 to \$ 74,999	5,167	22.3%	18,302	22.1%	23,469	22.2%
\$ 75,000 to \$ 99,999	4,643	20.1%	14,023	17.0%	18,666	17.6%
\$ 100,000 to \$ 149,999	4,621	20.0%	12,237	14.8%	16,858	15.9%
\$ 150,000 to \$ 249,999	2,489	10.8%	5,325	6.4%	7,814	7.4%
\$250,000 to \$499,999	270	1.2%	793	1.0%	1,063	1.0%
\$500,000 and Over	130	0.6%	236	0.3%	366	0.3%

**Demographic Comparison Report**  
**Fenton DDA; Fenton, Michigan**

	<b>Primary Trade Area Summary</b>		<b>Secondary Trade Area Summary</b>		<b>Total Trade Area Summary</b>	
2003 Households by Hhold Wealth:	31,846		119,954		151,800	
Less than \$25,000	5,871	18.4%	31,584	26.3%	37,455	24.7%
\$ 25,000 to \$ 49,999	2,046	6.4%	8,897	7.4%	10,943	7.2%
\$ 50,000 to \$ 74,999	1,800	5.7%	7,212	6.0%	9,012	5.9%
\$75,000 to \$99,999	2,057	6.5%	8,244	6.9%	10,301	6.8%
\$100,000 to \$149,999	3,297	10.4%	12,140	10.1%	15,437	10.2%
\$150,000 to \$249,999	5,097	16.0%	17,293	14.4%	22,390	14.7%
2003 Households by Hhold Type:	31,851		119,953		151,804	
Male Householder	3,277	10.3%	13,940	11.6%	17,217	11.3%
Female Householder	3,923	12.3%	16,971	14.1%	20,894	13.8%
Married Couple Family	8,970	28.2%	27,081	22.6%	36,051	23.7%
Married Couple No Children	10,760	33.8%	31,176	26.0%	41,936	27.6%
Other Family HH Own Child	1,952	6.1%	15,198	12.7%	17,150	11.3%
Other Family HH No Children	1,474	4.6%	9,203	7.7%	10,677	7.0%
Non-Family	1,495	4.7%	6,384	5.3%	7,879	5.2%
2003 Marital Status:						
For Population 15+ Years:	65,391		240,044		305,435	
Never Married	14,357	22.0%	65,348	27.2%	79,705	26.1%
Now Married (Exc. Separated)	41,491	63.5%	128,840	53.7%	170,331	55.8%
Divorced or Separated or Widowed	9,543	14.6%	45,856	19.1%	55,399	18.1%
2003 Educational Attainment for						
Population 25+ Years:	55,740		198,244		253,984	
Less than 9th Grade	1,998	3.6%	11,723	5.9%	13,721	5.4%
9th to 12th, No Diploma	5,824	10.4%	29,914	15.1%	35,738	14.1%
High School Graduate	17,575	31.5%	66,025	33.3%	83,600	32.9%
Some College, No Degree	14,081	25.3%	46,477	23.4%	60,558	23.8%
Associate Degree	5,106	9.2%	14,965	7.5%	20,071	7.9%
Bachelor's Degree	6,900	12.4%	18,411	9.3%	25,311	10.0%
Graduate or Prof. Degree	4,256	7.6%	10,729	5.4%	14,985	5.9%
2003 Pop. Age 16+, In Labor Force:	44,026		152,168		196,194	
Civilian Employed Males	23,684	53.8%	75,070	49.3%	98,754	50.3%
Civilian Employed Females	17,740	40.3%	62,024	40.8%	79,764	40.7%
Persons in Armed Forces	108	0.2%	186	0.1%	294	0.1%
Persons Unemployed	2,494	5.7%	14,888	9.8%	17,382	8.9%
2003 Specified Owner-Occ Housing						
Units by Value:	21,219		70,401		91,620	
Under \$25,000	70	0.3%	2,492	3.5%	2,562	2.8%
\$ 25,000 to \$ 49,999	480	2.3%	13,329	18.9%	13,809	15.1%
\$ 50,000 to \$74,999	2,197	10.4%	12,900	18.3%	15,097	16.5%
\$ 75,000 to \$99,999	4,054	19.1%	11,615	16.5%	15,669	17.1%
\$100,000 to \$149,999	7,438	35.1%	15,974	22.7%	23,412	25.6%
\$150,000 to \$199,999	3,445	16.2%	6,839	9.7%	10,284	11.2%
\$200,000 to \$299,999	2,464	11.6%	5,471	7.8%	7,935	8.7%
\$300,000 to \$399,999	645	3.0%	1,199	1.7%	1,844	2.0%
\$400,000 to \$499,999	230	1.1%	368	0.5%	598	0.7%
\$500,000 and Over	196	0.9%	214	0.3%	410	0.4%
Median Housing Value	\$122,324		\$91,572		\$97,883	

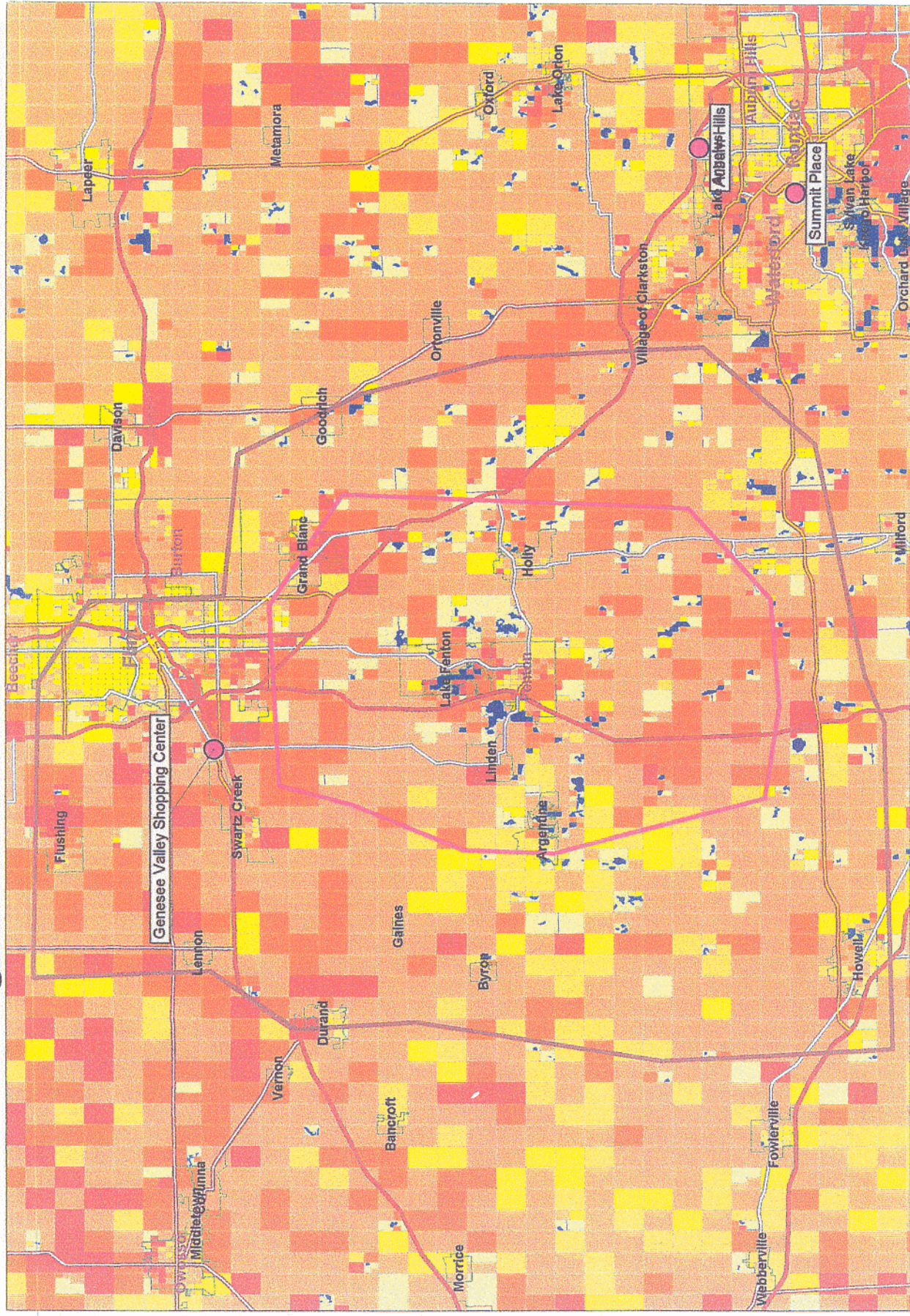
**Demographic Comparison Report**  
**Fenton DDA; Fenton, Michigan**

	<u>Primary Trade Area Summary</u>		<u>Secondary Trade Area Summary</u>		<u>Total Trade Area Summary</u>	
2003 Housing Units by Number of Units in Structure:	33,715		130,602		164,317	
Single Detached Unit	26,142	77.5%	96,087	73.6%	122,229	74.4%
Single Attached Unit	1,028	3.0%	2,905	2.2%	3,933	2.4%
Structures w/ 2 Units	695	2.1%	4,459	3.4%	5,154	3.1%
Structures w/ 3-4 Units	697	2.1%	3,448	2.6%	4,145	2.5%
Structures w/ 5-9 Units	1,050	3.1%	3,799	2.9%	4,849	3.0%
Structures w/ 10-19 Units	1,437	4.3%	5,772	4.4%	7,209	4.4%
Structures w/ 20+ Units	979	2.9%	4,268	3.3%	5,247	3.2%
Mobile Homes or Trailers	1,432	4.2%	8,723	6.7%	10,155	6.2%
Other Structures	255	0.8%	1,141	0.9%	1,396	0.8%
2003 Housing Units by Year Built:	33,721		130,590		164,311	
Built 1989 to March 1990	9,541	28.3%	20,517	15.7%	30,058	18.3%
Built 1985 to 1988	2,151	6.4%	5,375	4.1%	7,526	4.6%
Built 1980 to 1984	1,524	4.5%	4,549	3.5%	6,073	3.7%
Built 1970 to 1979	6,878	20.4%	24,274	18.6%	31,152	19.0%
Built 1960 to 1969	4,965	14.7%	20,225	15.5%	25,190	15.3%
Built 1959 or Earlier	8,662	25.7%	55,650	42.6%	64,312	39.1%
2003 Households by Vehicles:	31,844		119,967		151,811	
0 Vehicles	885	2.8%	11,900	9.9%	12,785	8.4%
1 Vehicle Available	8,037	25.2%	38,480	32.1%	46,517	30.6%
2 Vehicles Available	14,513	45.6%	46,102	38.4%	60,615	39.9%
3 Vehicles Available	5,726	18.0%	16,183	13.5%	21,909	14.4%
4 Vehicles Available	1,982	6.2%	5,223	4.4%	7,205	4.7%
5+ Vehicles Available	701	2.2%	2,079	1.7%	2,780	1.8%
2003 Housing Units by Year Moved In:	31,845		119,951		151,796	
Moved 0-1 year ago	5,351	16.8%	21,283	17.7%	26,634	17.5%
Moved in 2-5 years ago	9,892	31.1%	34,132	28.5%	44,024	29.0%
Moved in 6-10 years ago	4,210	13.2%	15,807	13.2%	20,017	13.2%
Moved in 11-20 years ago	7,221	22.7%	26,714	22.3%	33,935	22.4%
Moved in 21-30 years ago	3,068	9.6%	12,148	10.1%	15,216	10.0%
Moved in 31 years ago or more	2,103	6.6%	9,867	8.2%	11,970	7.9%



# 2002 Median Age

Scan/US, Inc.

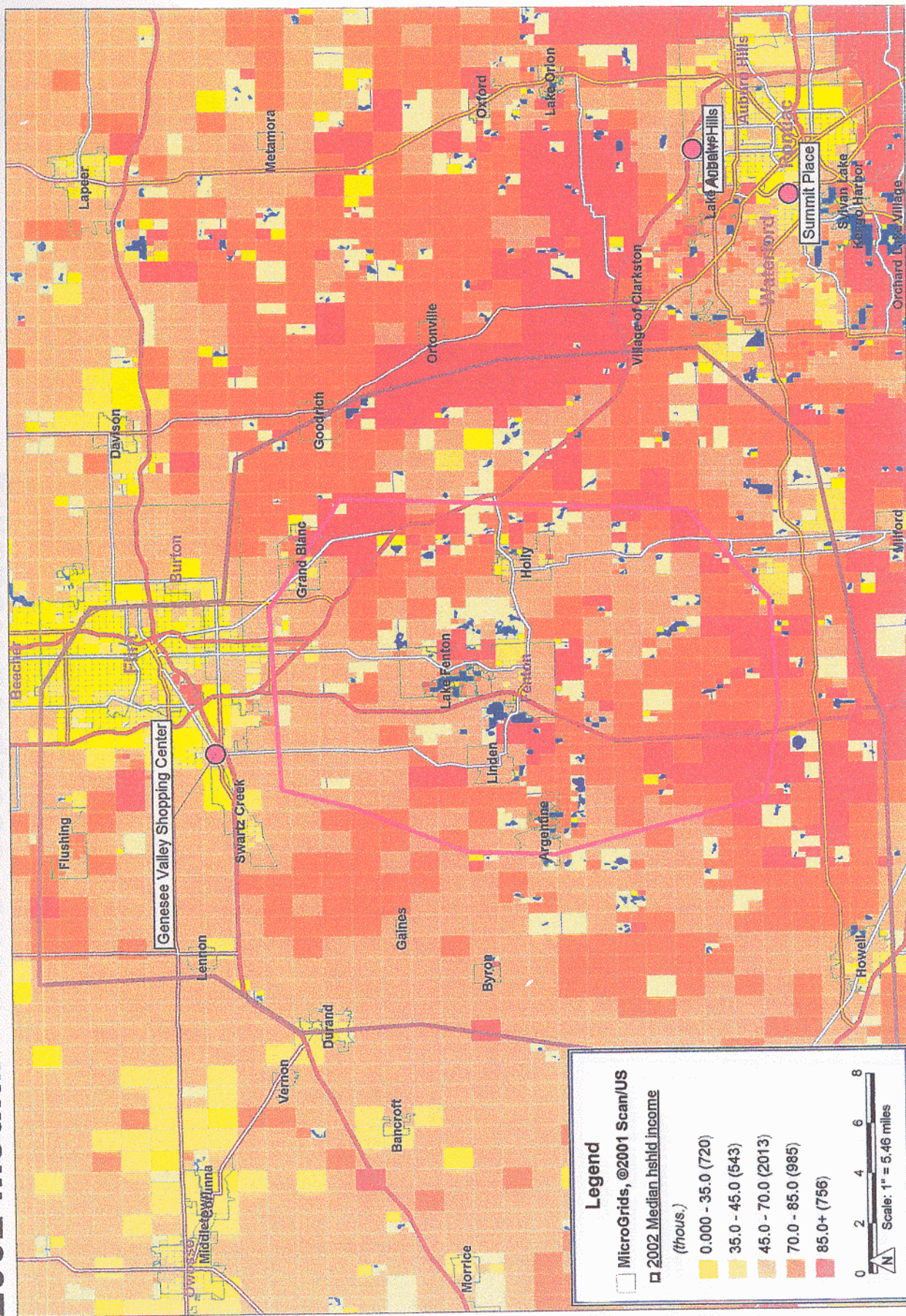


Demographic data based on ScanUS Microgrids. Where there is no population, there is no data.



# 2002 Median Household Income

Scan/US, Inc.



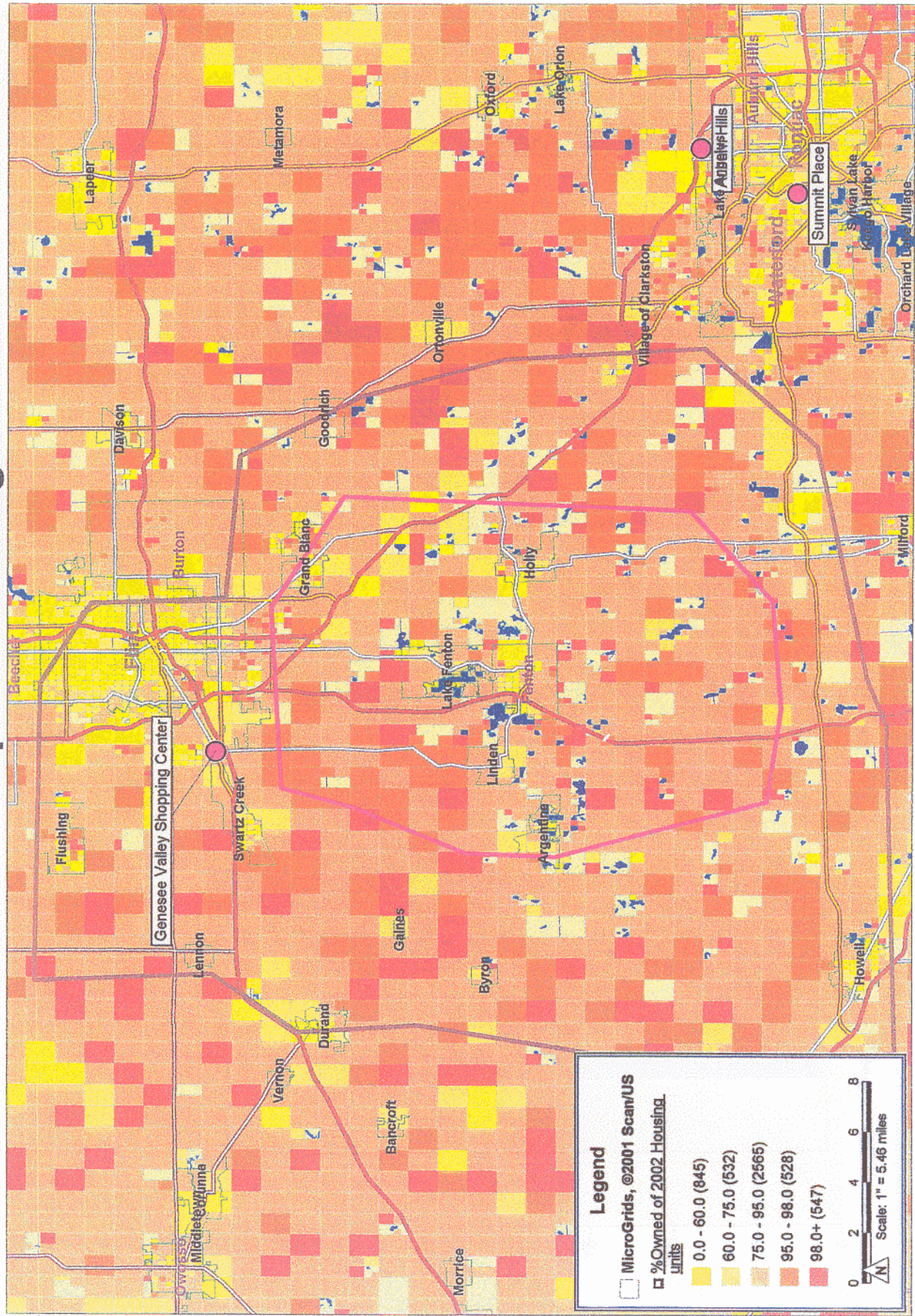
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07/25/03



# 2002 Percent Owner occupied Housing

Scan/US, Inc.



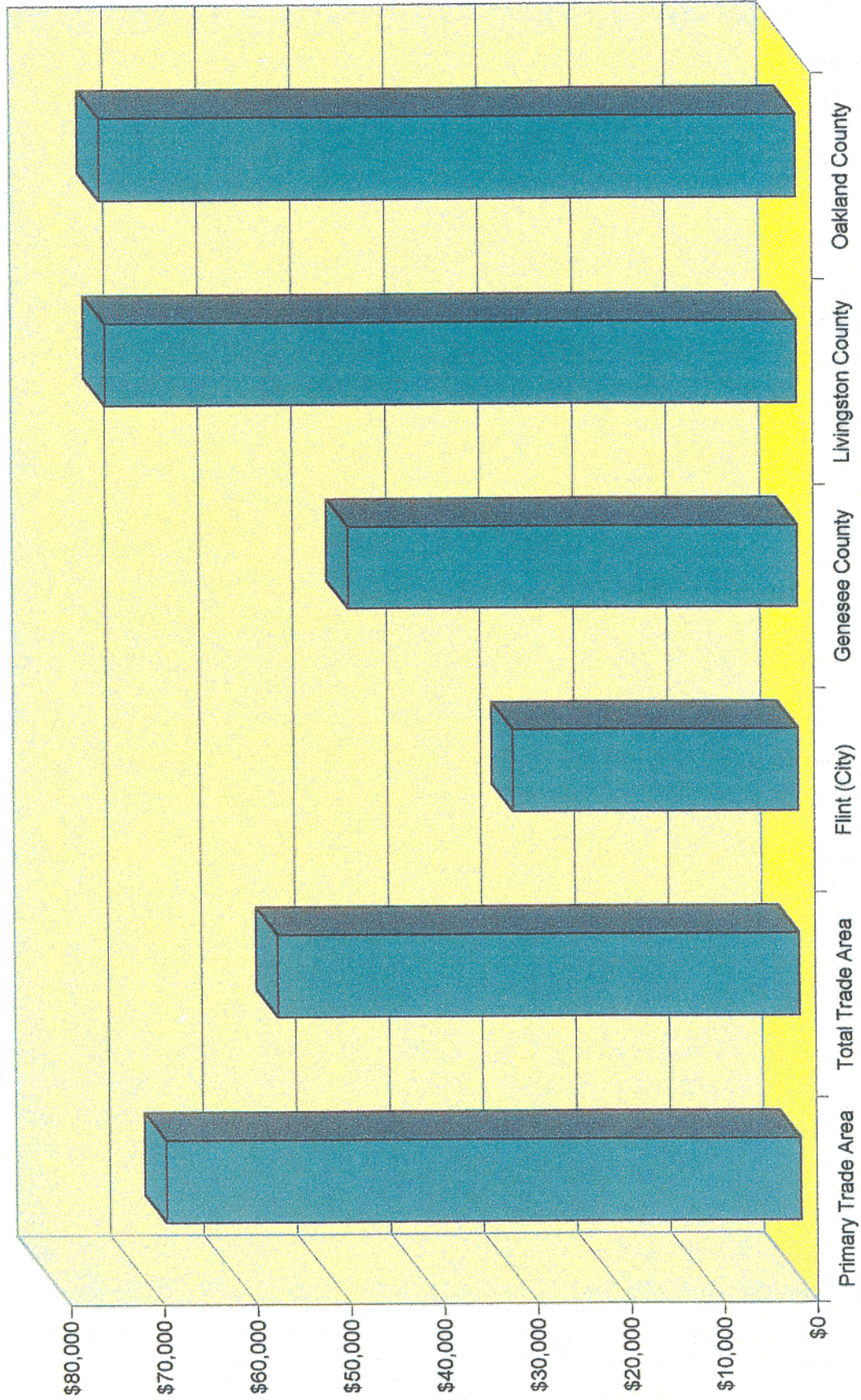


## Median Age



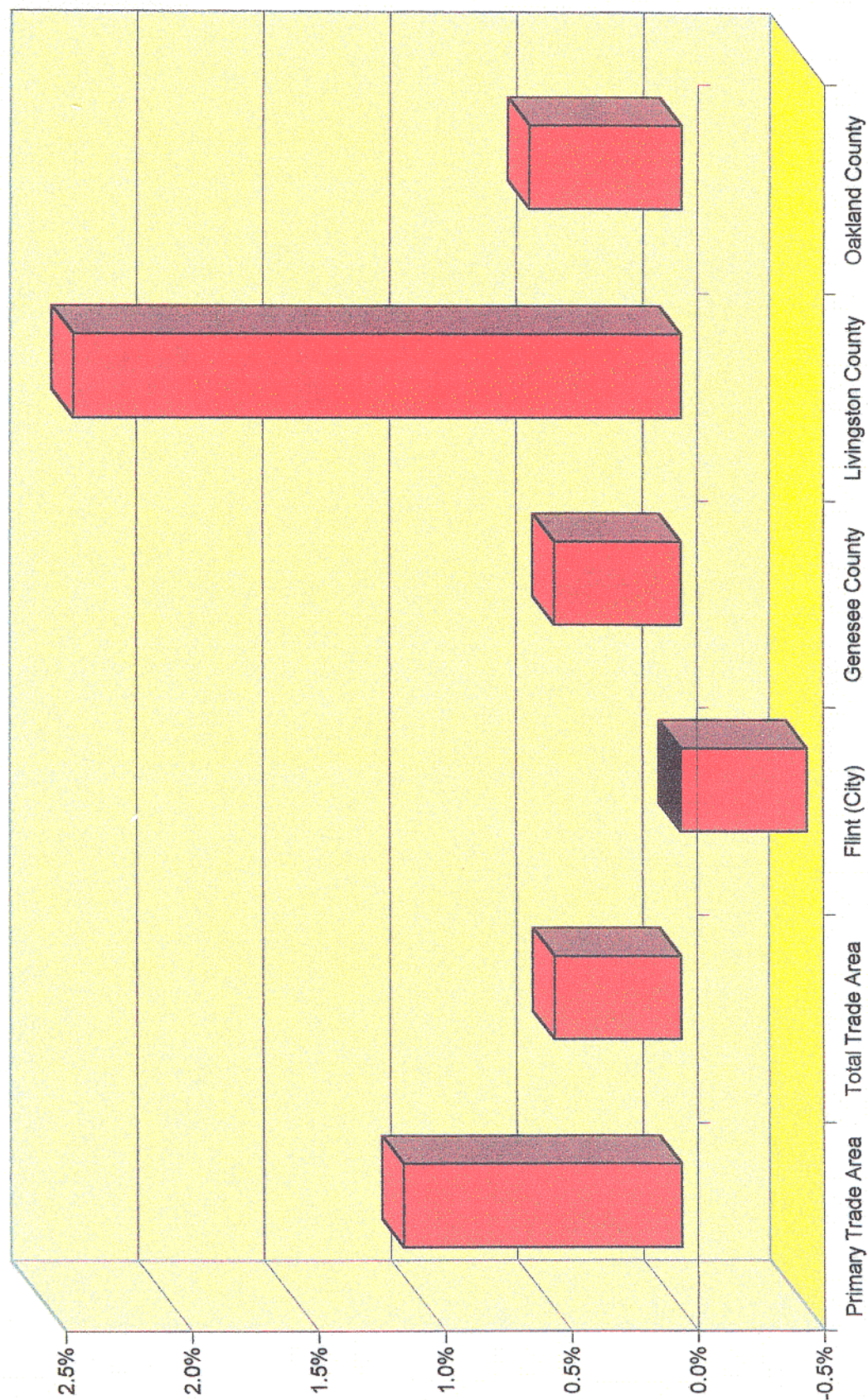


## Median Household Income



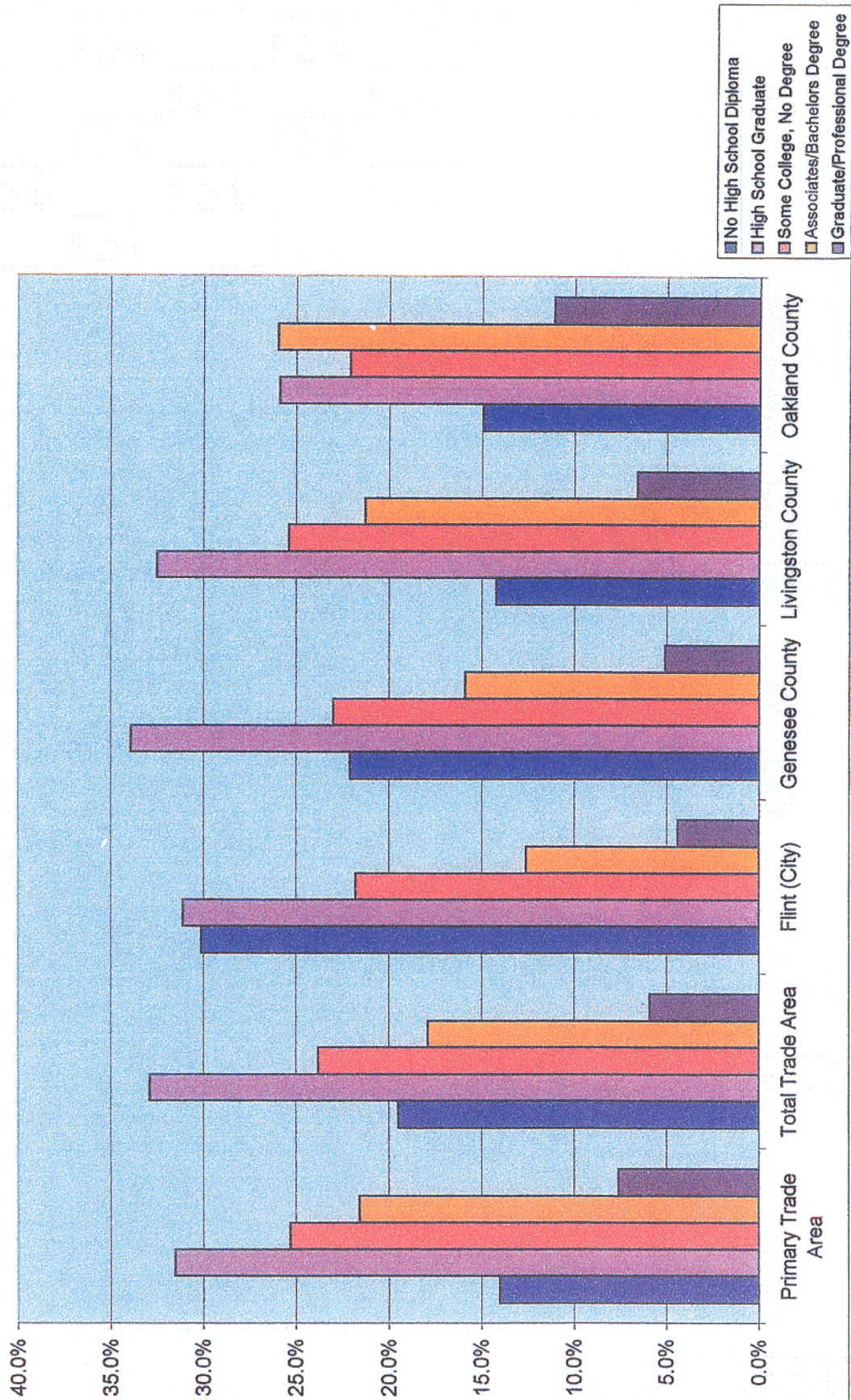


## Population Growth, 2003-2008





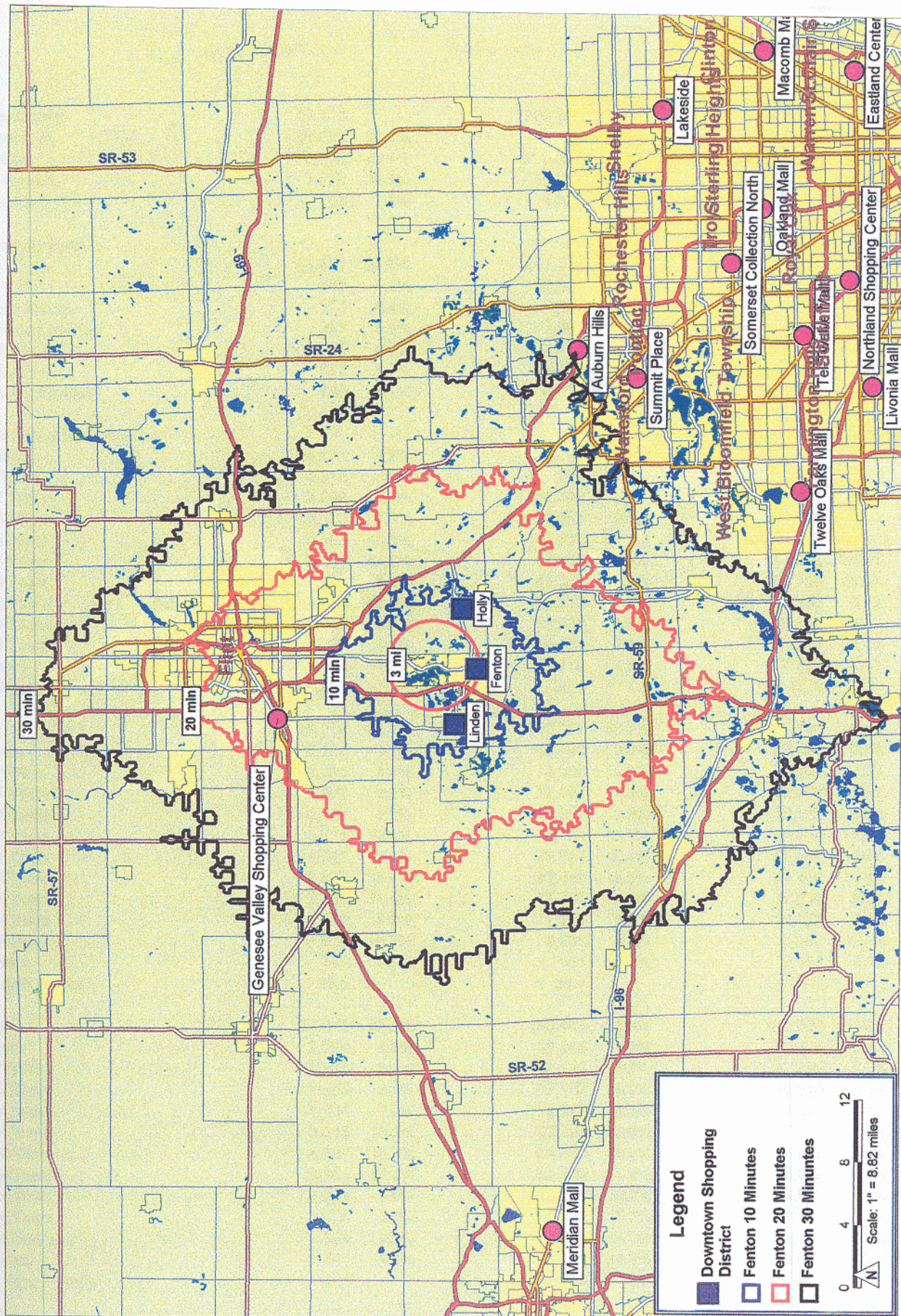
# Population Age 25+, Educational Attainment





# Fenton Drive Times

Scan/US, Inc.





	10-MIN CONTOUR		20-MIN CONTOUR		30-MIN CONTOUR	
<b>Total Population</b>	47,274		293,649		705,937	
In Households	46,822	99.0%	289,320	98.5%	698,349	98.9%
In Families	39,283	83.1%	236,307	80.5%	584,484	82.8%
In Non-families	7,539	15.9%	53,013	18.1%	113,865	16.1%
In Group Quarters	453	1.0%	4,329	1.5%	7,587	1.1%
<b>Population By Race</b>						
White	45,481	96.2%	241,430	82.2%	587,922	83.3%
Black	488	1.0%	39,565	13.5%	92,477	13.1%
American Indian	173	0.4%	1,541	0.5%	3,253	0.5%
Asian/Pacific Islander	377	0.8%	2,881	1.0%	5,420	0.8%
Other Race	228	0.5%	2,182	0.7%	4,376	0.6%
Multi-Racial	527	1.1%	6,050	2.1%	12,487	1.8%
Hispanic Population	780	1.7%	6,912	2.4%	14,718	2.1%
<b>Population By Age &amp; Gender</b>						
< 6 Years	4,131	8.7%	26,735	9.1%	63,659	9.0%
6 - 11 Years	4,010	8.5%	26,793	9.1%	66,238	9.4%
12 - 17 Years	3,936	8.3%	25,349	8.6%	63,301	9.0%
18 - 24 Years	3,576	7.6%	25,594	8.7%	59,911	8.5%
25 - 34 Years	6,567	13.9%	40,330	13.7%	92,002	13.0%
35 - 44 Years	8,019	17.0%	47,937	16.3%	117,310	16.6%
45 - 54 Years	7,241	15.3%	42,552	14.5%	104,750	14.8%
55 - 64 Years	4,716	10.0%	26,973	9.2%	66,538	9.4%
65 - 74 Years	2,854	6.0%	16,936	5.8%	40,355	5.7%
75 - 84 Years	1,623	3.4%	10,484	3.6%	23,669	3.4%
85+ Years	584	1.2%	3,712	1.3%	7,726	1.1%
Median Age	37.3		35.7		35.8	
<b>Males</b>	23,234	49.1%	143,008	48.7%	345,048	48.9%
< 6 Years	2,107	9.1%	13,766	9.6%	32,761	9.5%
6 - 11 Years	2,036	8.8%	13,668	9.6%	33,844	9.8%
12 - 17 Years	1,979	8.5%	12,897	9.0%	32,488	9.4%
18 - 24 Years	1,842	7.9%	12,907	9.0%	30,382	8.8%
25 - 34 Years	3,219	13.9%	19,624	13.7%	44,554	12.9%
35 - 44 Years	4,011	17.3%	23,517	16.4%	57,361	16.6%
45 - 54 Years	3,577	15.4%	20,843	14.6%	51,249	14.9%
55 - 64 Years	2,338	10.1%	13,145	9.2%	32,639	9.5%
65 - 74 Years	1,330	5.7%	7,620	5.3%	18,422	5.3%
75 - 84 Years	639	2.7%	4,006	2.8%	9,202	2.7%
85+ Years	144	0.6%	981	0.7%	2,091	0.6%
Median Age, Males	36.5		34.5		34.7	
<b>Females</b>	24,041	50.9%	150,443	51.2%	360,522	51.1%
< 6 Years	2,024	8.4%	12,969	8.6%	30,898	8.6%
6 - 11 Years	1,975	8.2%	13,125	8.7%	32,394	9.0%
12 - 17 Years	1,957	8.1%	12,452	8.3%	30,813	8.5%
18 - 24 Years	1,734	7.2%	12,687	8.4%	29,529	8.2%
25 - 34 Years	3,348	13.9%	20,705	13.8%	47,448	13.2%
35 - 44 Years	4,008	16.7%	24,420	16.2%	59,949	16.6%
45 - 54 Years	3,665	15.2%	21,709	14.4%	53,502	14.8%
55 - 64 Years	2,378	9.9%	13,829	9.2%	33,899	9.4%
65 - 74 Years	1,524	6.3%	9,315	6.2%	21,933	6.1%
75 - 84 Years	984	4.1%	6,478	4.3%	14,467	4.0%
85+ Years	441	1.8%	2,731	1.8%	5,634	1.6%
Median Age, Female	38.1		36.8		36.9	

	10-MIN CONTOUR		20-MIN CONTOUR		30-MIN CONTOUR	
Total Households	18,636		114,960		269,559	
Total Aggregate Income (\$Mil)	\$1,322.76		\$7,178.85		\$17,999.46	
Total Per Capita Income	\$27,981		\$24,447		\$25,497	
Households By Income Level						
< \$10,000	832	4.5%	8,442	7.3%	17,383	6.4%
\$10,000 - \$14,999	600	3.2%	5,448	4.7%	11,500	4.3%
\$15,000 - \$19,999	728	3.9%	6,552	5.7%	14,195	5.3%
\$20,000 - \$24,999	761	4.1%	6,443	5.6%	14,105	5.2%
\$25,000 - \$29,999	820	4.4%	6,472	5.6%	14,444	5.4%
\$30,000 - \$34,999	882	4.7%	6,350	5.5%	13,976	5.2%
\$35,000 - \$39,999	887	4.8%	5,959	5.2%	13,371	5.0%
\$40,000 - \$49,999	1,790	9.6%	11,844	10.3%	26,658	9.9%
\$50,000 - \$59,999	1,952	10.5%	10,445	9.1%	23,875	8.9%
\$60,000 - \$74,999	2,426	13.0%	13,350	11.6%	32,004	11.9%
\$75,000 - \$99,999	2,974	16.0%	15,313	13.3%	38,714	14.4%
\$100,000 - \$124,999	1,977	10.6%	8,709	7.6%	22,835	8.5%
\$125,000 - \$149,999	949	5.1%	4,232	3.7%	11,217	4.2%
\$150,000 - \$199,999	596	3.2%	2,806	2.4%	7,715	2.9%
\$200,000 - \$249,999	179	1.0%	870	0.8%	2,474	0.9%
\$250,000+	263	1.4%	1,639	1.4%	4,924	1.8%
Aggregate HH Income (\$Mil)	\$1,312.53		\$7,076.30		\$17,790.13	
Average HH Income	\$70,431		\$61,554		\$65,997	
Median HH Income	\$62,295		\$52,678		\$56,335	
Households By Disposable Income Level						
< \$10,000	933	5.0%	9,464	8.2%	19,566	7.3%
\$10,000 - \$14,999	587	3.1%	5,398	4.7%	11,435	4.2%
\$15,000 - \$19,999	840	4.5%	7,400	6.4%	16,096	6.0%
\$20,000 - \$24,999	963	5.2%	8,005	7.0%	17,604	6.5%
\$25,000 - \$29,999	1,082	5.8%	8,174	7.1%	18,131	6.7%
\$30,000 - \$34,999	1,121	6.0%	7,507	6.5%	16,856	6.3%
\$35,000 - \$39,999	1,155	6.2%	7,758	6.7%	17,478	6.5%
\$40,000 - \$49,999	2,635	14.1%	14,730	12.8%	33,523	12.4%
\$50,000 - \$59,999	2,238	12.0%	12,336	10.7%	29,635	11.0%
\$60,000 - \$74,999	2,830	15.2%	14,646	12.7%	37,043	13.7%
\$75,000 - \$99,999	2,495	13.4%	11,111	9.7%	28,824	10.7%
\$100,000 - \$124,999	940	5.0%	4,230	3.7%	11,321	4.2%
\$125,000 - \$149,999	376	2.0%	1,738	1.5%	4,819	1.8%
\$150,000 - \$199,999	248	1.3%	1,228	1.1%	3,497	1.3%
\$200,000 - \$249,999	52	0.3%	277	0.2%	893	0.3%
\$250,000+	123	0.7%	876	0.8%	2,673	1.0%
Aggr Disposable Income (\$Mil)	\$1,080.82		\$5,911.43		\$14,755.36	
Average Disposable Income	\$57,997		\$51,422		\$54,739	
Median Disposable Income	\$51,191		\$43,791		\$46,465	
Aggr Family Income (\$Mil)	\$1,072.15		\$5,584.51		\$14,456.07	
Average Family Income	\$81,745		\$71,928		\$75,966	
Median Family Income	\$74,011		\$63,182		\$66,262	
Aggr Non-family Income (\$Mil)	\$240.21		\$1,491.66		\$3,334.07	
Average Non-family Income	\$43,516		\$39,970		\$42,063	
Median Non-family Income	\$34,288		\$30,665		\$32,144	

	10-MIN CONTOUR		20-MIN CONTOUR		30-MIN CONTOUR	
Total Households	18,636		114,960		269,559	
Average Household Size	2.5		2.5		2.6	
Total Family Households	13,116	70.4%	77,640	67.5%	190,296	70.6%
Families With Children	6,579	50.2%	41,616	53.6%	101,957	53.6%
Average Family Size	3.0		3.0		3.1	
Total Non-family Households	5,520	29.6%	37,320	32.5%	79,263	29.4%
Non-families With Children	70	0.5%	534	0.7%	1,157	0.6%
Average Non-family Size	1.4		1.4		1.4	
Households By Count of Persons						
1 Person	4,477	24.0%	30,828	26.8%	65,076	24.1%
2 Persons	6,526	35.0%	37,108	32.3%	87,900	32.6%
3-4 Persons	6,020	32.3%	36,253	31.5%	89,309	33.1%
5+ Persons	1,612	8.6%	10,769	9.4%	27,268	10.1%
Total Vehicles Available	36,677		205,320		499,381	
Households By Count of Vehicles Available						
0 Vehicles	613	3.3%	7,764	6.8%	16,083	6.0%
1 Vehicle	5,069	27.2%	38,436	33.4%	83,225	30.9%
2 Vehicles	8,697	46.7%	47,364	41.2%	115,444	42.8%
3+ Vehicles	4,255	22.8%	21,390	18.6%	54,794	20.3%
Average Vehicles Per HH	2.0		1.8		1.9	
Total Housing Units	19,651		124,119		289,929	
Owner-Occupied	15,159	77.1%	85,578	68.9%	211,255	72.9%
Renter-Occupied	3,477	17.7%	29,382	23.7%	58,304	20.1%
Vacant	1,015	5.2%	9,159	7.4%	20,370	7.0%

	10-MIN CONTOUR		20-MIN CONTOUR		30-MIN CONTOUR	
<b>Total Population</b>	50,935		310,133		743,846	
In Households	50,483	99.1%	305,804	98.6%	736,259	99.0%
In Families	42,178	82.8%	249,262	80.4%	615,143	82.7%
In Non-families	8,304	16.3%	56,542	18.2%	121,116	16.3%
In Group Quarters	453	0.9%	4,329	1.4%	7,587	1.0%
<b>Population By Race</b>						
White	48,379	95.0%	253,553	81.8%	618,601	83.2%
Black	1,069	2.1%	43,382	14.0%	98,235	13.2%
American Indian	201	0.4%	1,621	0.5%	3,419	0.5%
Asian/Pacific Islander	424	0.8%	3,001	1.0%	5,977	0.8%
Other Race	258	0.5%	2,253	0.7%	4,517	0.6%
Multi-Racial	604	1.2%	6,323	2.0%	13,098	1.8%
Hispanic Population	848	1.7%	7,242	2.3%	15,346	2.1%
<b>Population By Age &amp; Gender</b>						
< 6 Years	4,187	8.2%	26,365	8.5%	62,742	8.4%
6 - 11 Years	3,976	7.8%	25,921	8.4%	63,772	8.6%
12 - 17 Years	4,106	8.1%	26,102	8.4%	64,517	8.7%
18 - 24 Years	4,016	7.9%	28,275	9.1%	65,870	8.9%
25 - 34 Years	6,765	13.3%	41,062	13.2%	93,881	12.6%
35 - 44 Years	7,759	15.2%	45,460	14.7%	111,207	15.0%
45 - 54 Years	8,275	16.2%	47,901	15.4%	117,444	15.8%
55 - 64 Years	6,218	12.2%	35,104	11.3%	85,892	11.5%
65 - 74 Years	3,250	6.4%	18,828	6.1%	44,829	6.0%
75 - 84 Years	1,732	3.4%	11,085	3.6%	25,154	3.4%
85+ Years	635	1.2%	3,981	1.3%	8,444	1.1%
Median Age	38.6		37.0		37.2	
<b>Males</b>	25,112	49.3%	151,550	48.9%	364,826	49.0%
< 6 Years	2,104	8.4%	13,397	8.8%	32,073	8.8%
6 - 11 Years	2,001	8.0%	13,155	8.7%	32,504	8.9%
12 - 17 Years	2,063	8.2%	13,251	8.7%	33,020	9.1%
18 - 24 Years	2,100	8.4%	14,397	9.5%	33,696	9.2%
25 - 34 Years	3,315	13.2%	20,023	13.2%	45,630	12.5%
35 - 44 Years	3,895	15.5%	22,360	14.8%	54,519	14.9%
45 - 54 Years	4,099	16.3%	23,533	15.5%	57,585	15.8%
55 - 64 Years	3,089	12.3%	17,107	11.3%	42,140	11.6%
65 - 74 Years	1,555	6.2%	8,731	5.8%	20,969	5.7%
75 - 84 Years	713	2.8%	4,450	2.9%	10,209	2.8%
85+ Years	166	0.7%	1,115	0.7%	2,432	0.7%
Median Age, Males	37.9		36.0		36.2	
<b>Females</b>	25,824	50.7%	158,583	51.1%	379,020	51.0%
< 6 Years	2,083	8.1%	12,968	8.2%	30,669	8.1%
6 - 11 Years	1,974	7.6%	12,766	8.1%	31,268	8.2%
12 - 17 Years	2,044	7.9%	12,852	8.1%	31,497	8.3%
18 - 24 Years	1,916	7.4%	13,878	8.8%	32,174	8.5%
25 - 34 Years	3,449	13.4%	21,039	13.3%	48,251	12.7%
35 - 44 Years	3,864	15.0%	23,100	14.6%	56,688	15.0%
45 - 54 Years	4,177	16.2%	24,367	15.4%	59,860	15.8%
55 - 64 Years	3,129	12.1%	17,997	11.3%	43,752	11.5%
65 - 74 Years	1,696	6.6%	10,097	6.4%	23,859	6.3%
75 - 84 Years	1,019	3.9%	6,635	4.2%	14,945	3.9%
85+ Years	469	1.8%	2,866	1.8%	6,012	1.6%
Median Age, Female	39.2		38.0		38.1	



**Demographic Comparison: 2007**  
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	10-MIN CONTOUR		20-MIN CONTOUR		30-MIN CONTOUR	
Total Households	20,681		123,268		289,970	
Total Aggregate Income (\$Mil)	\$1,621.85		\$8,632.04		\$21,606.95	
Total Per Capita Income	\$31,841		\$27,833		\$29,048	
Households By Income Level						
< \$10,000	731	3.5%	7,441	6.0%	15,029	5.2%
\$10,000 - \$14,999	324	1.6%	3,056	2.5%	6,377	2.2%
\$15,000 - \$19,999	830	4.0%	7,073	5.7%	15,240	5.3%
\$20,000 - \$24,999	690	3.3%	6,184	5.0%	13,325	4.6%
\$25,000 - \$29,999	721	3.5%	5,748	4.7%	12,826	4.4%
\$30,000 - \$34,999	825	4.0%	6,294	5.1%	14,118	4.9%
\$35,000 - \$39,999	856	4.1%	5,931	4.8%	13,149	4.5%
\$40,000 - \$49,999	1,843	8.9%	11,790	9.6%	26,746	9.2%
\$50,000 - \$59,999	2,052	9.9%	12,389	10.1%	28,047	9.7%
\$60,000 - \$74,999	2,401	11.6%	12,079	9.8%	28,325	9.8%
\$75,000 - \$99,999	3,725	18.0%	19,604	15.9%	48,561	16.7%
\$100,000 - \$124,999	2,240	10.8%	10,218	8.3%	26,302	9.1%
\$125,000 - \$149,999	1,335	6.5%	5,690	4.6%	15,122	5.2%
\$150,000 - \$199,999	1,294	6.3%	5,628	4.6%	14,887	5.1%
\$200,000 - \$249,999	348	1.7%	1,571	1.3%	4,410	1.5%
\$250,000+	448	2.2%	2,503	2.0%	7,369	2.5%
Aggregate HH Income (\$Mil)	\$1,613.68		\$8,512.45		\$21,400.18	
Average HH Income	\$78,028		\$69,057		\$73,801	
Median HH Income	\$70,702		\$60,035		\$64,066	
Households By Disposable Income Level						
< \$10,000	772	3.7%	7,850	6.4%	16,214	5.6%
\$10,000 - \$14,999	343	1.7%	3,342	2.7%	6,993	2.4%
\$15,000 - \$19,999	929	4.5%	7,903	6.4%	16,967	5.9%
\$20,000 - \$24,999	852	4.1%	7,442	6.0%	16,217	5.6%
\$25,000 - \$29,999	1,018	4.9%	7,826	6.3%	17,439	6.0%
\$30,000 - \$34,999	1,088	5.3%	7,532	6.1%	16,784	5.8%
\$35,000 - \$39,999	1,079	5.2%	7,136	5.8%	15,983	5.5%
\$40,000 - \$49,999	2,870	13.9%	17,319	14.1%	39,238	13.5%
\$50,000 - \$59,999	2,215	10.7%	11,100	9.0%	26,039	9.0%
\$60,000 - \$74,999	3,555	17.2%	18,765	15.2%	46,448	16.0%
\$75,000 - \$99,999	2,857	13.8%	13,005	10.6%	33,442	11.5%
\$100,000 - \$124,999	1,537	7.4%	6,624	5.4%	17,402	6.0%
\$125,000 - \$149,999	771	3.7%	3,394	2.8%	9,124	3.1%
\$150,000 - \$199,999	474	2.3%	2,204	1.8%	6,174	2.1%
\$200,000 - \$249,999	109	0.5%	544	0.4%	1,615	0.6%
\$250,000+	193	0.9%	1,218	1.0%	3,763	1.3%
Aggr Disposable Income (\$Mil)	\$1,304.10		\$6,999.69		\$17,474.83	
Average Disposable Income	\$63,059		\$56,784		\$60,264	
Median Disposable Income	\$57,081		\$49,149		\$52,065	
Aggr Family Income (\$Mil)	\$1,289.58		\$6,570.67		\$17,018.70	
Average Family Income	\$91,050		\$80,562		\$84,891	
Median Family Income	\$84,184		\$71,949		\$75,304	
Aggr Non-family Income (\$Mil)	\$323.92		\$1,940.84		\$4,380.43	
Average Non-family Income	\$49,701		\$46,535		\$48,948	
Median Non-family Income	\$44,482		\$38,724		\$40,721	

**Demographic Comparison: 2007**  
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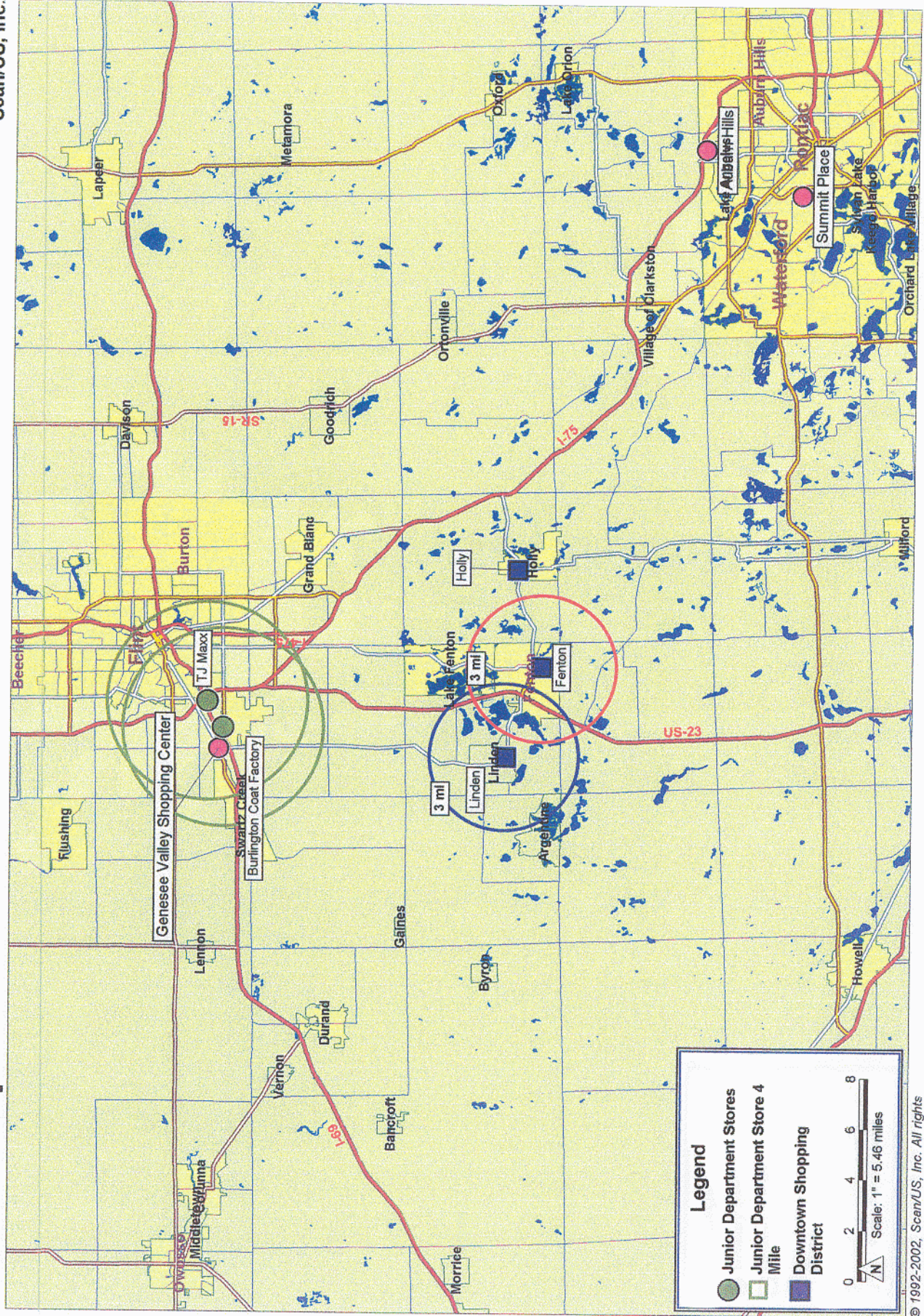
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	10-MIN CONTOUR		20-MIN CONTOUR		30-MIN CONTOUR	
<b>Total Households</b>	20,681		123,268		289,970	
Average Household Size	2.4		2.5		2.5	
<b>Total Family Households</b>	14,163	68.5%	81,561	66.2%	200,477	69.1%
Families With Children	7,085	50.0%	43,703	53.6%	107,285	53.5%
Average Family Size	3.0		3.1		3.1	
<b>Total Non-family Households</b>	6,517	31.5%	41,707	33.8%	89,492	30.9%
Non-families With Children	91	0.6%	623	0.8%	1,366	0.7%
Average Non-family Size	1.3		1.4		1.4	
<b>Households By Count of Persons</b>						
1 Person	5,265	25.5%	34,214	27.8%	72,959	25.2%
2 Persons	7,065	34.2%	39,098	31.7%	93,183	32.1%
3-4 Persons	6,550	31.7%	38,409	31.2%	94,626	32.6%
5+ Persons	1,800	8.7%	11,547	9.4%	29,197	10.1%
<b>Total Vehicles Available</b>	41,076		222,514		541,821	
<b>Households By Count of Vehicles Available</b>						
0 Vehicles	652	3.2%	8,100	6.6%	16,724	5.8%
1 Vehicle	5,498	26.6%	40,521	32.9%	88,096	30.4%
2 Vehicles	9,690	46.9%	51,141	41.5%	125,131	43.2%
3+ Vehicles	4,839	23.4%	23,502	19.1%	60,009	20.7%
<b>Average Vehicles Per HH</b>	2.0		1.8		1.9	
<b>Total Housing Units</b>	21,814		133,206		312,371	
Owner-Occupied	17,103	78.4%	93,321	70.1%	230,527	73.8%
Renter-Occupied	3,578	16.4%	29,947	22.5%	59,443	19.0%
Vacant	1,134	5.2%	9,938	7.5%	22,402	7.2%



# Junior Department Stores

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# Dollar/Variety Stores

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