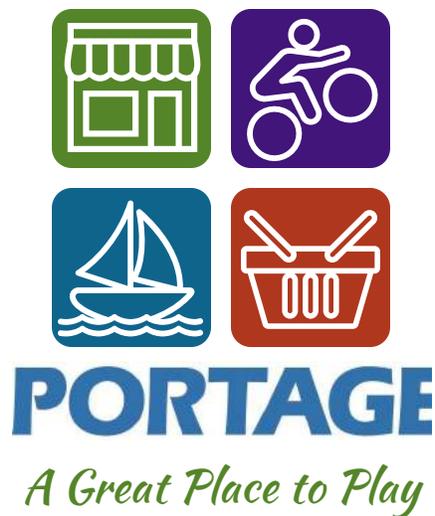


The Lake Center District The City of Portage, Michigan Retail Market Analysis



Draft Report
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Market Analysis
Prepared by:



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Planning Support
Provided by:



Farr Associates

Acknowledgements
Retail Market Study
Portage Lake Center District

Introduction – This 2020 Retail Market Study has been commissioned by the City of Portage, located in Kalamazoo County, Michigan and part of the Southwest Michigan region. This study is the second of three that collectively focus on 1) housing, 2) retail, and 3) commercial uses for the City of Portage's Lake Center District. This second document focuses not only on conventional retail categories, but also restaurants and eateries; revenue-generating types of entertainment and recreational venues; and complementary types of businesses.

Acknowledgements – Stakeholders are invited to contact LandUseUSA | Urban Strategies directly with any questions regarding the work approach, methodology, findings, and conclusions on this retail market study. Similarly, the city's economic development and planning staff can be contacted directly with any questions regarding its plans or community vision; the stakeholder engagement process; site-specific opportunities; and next-steps for prospective developers and potential investors. In addition, Farr Associates may be contacted directly about any planning related questions for the Lake Center District. The team's contact information is provided below:

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Reporting Format | Infographics
Retail Market Study
Portage Lake Center District

Reporting Format – This narrative report for the City of Portage's retail market study is designed to be as succinct as possible; and it focuses on key observations and conclusions rather than methodologies, data sources, or analytic approach. It also focuses mainly on the Lake Center District, including properties along Portage Road from Centre Avenue south to Osterhout Avenue; and pivoting around a “Hub” located at the closest point between West Lake and Austin Lake.

In using this report and document, any number of the attached Infographics may be extracted, shuffled, and printed to facilitate meetings and discussions. Developers are welcome to include a copy of the entire report or excerpts in loan and/or grant applications. Individual graphs can also be converted into .jpg images, cropped, and inserted into slide presentations. However, we respectfully ask that all extracted materials be fully credited to LandUseUSA | Urban Strategies and on behalf of the City of Portage.

For readers unfamiliar with the enclosed materials and Infographics, it is recommended that the Table of Contents be reviewed first. Then, the information on each page should be read in this order: main title, graph or chart title, x-axis title and labels, y-axis title and labels, the data shown in the chart, the footnote with the data source, and then any text or paragraphs that might be shown on the page.

Data Correlations – Readers are encouraged to study all of the attached Infographics and strive to draw some conclusions on their own. They are also encouraged to identify direct and indirect relationships between the variables, because many of them are indeed correlated. In particular, net export among some of the retail categories reveals opportunities to add new stores. Inversely, net import in other categories points to industry strengths that could be leveraged by niche and complementary types of businesses.

Years, Numbers, and Percentages – The years of the data vary between the exhibits and usually include actual reported data for year-end 2019 with estimates for 2020 (prior to COVID-19). All estimates are based on market trends and data prior to the 2020 pandemic and economic crisis; and have not been adjusted for those unexpected events. Depending on the variable, the information might also be reported as actual numbers or as percentages. Footnotes at the bottom of each page also provide the data sources.

The Work Approach
Retail Market Study
Portage Lake Center District

Field Work and Stakeholder Interviews – LandUseUSA made several trips to the City of Portage, the Lake Center District, and surrounding markets in 2014 and 2020; and has toured the local market numerous times over the past two decades. During these trips we gathered photo inventories of existing shopping choices; observed the mix and character of neighborhood centers; toured the primary trade area, conducted a review of municipally-owned lots with city staff; and considered the overall marketability of the Lake Center District and its “Hub” to prospective developers, retail tenants, and businesses.

Stakeholder Engagement – Due to the Michigan State Governor’s Executive Orders during the health and economic crisis attributed to COVID-19, all stakeholder engagement for the project has been postponed until the summer of 2020. However, we will participate in events that will be coordinated and facilitated by Farr Associates. These will include video reviews of draft reports and a virtual workshop followed by an in-person workshop, design studio, and additional video reviews. Stakeholder input and questions will be documented during these events and used to refine this draft retail market study.

Analytic Approach – This retail market study has involved quantitative data analysis and the application of empirical models to measure the aggregate and near-term market potential for new retail space in and near the City of Portage’s Lake Center District. The work has included an analysis of retail import and export; cluster analysis of established businesses; study of resident expenditure potential based on the trade area population and per capita income; sales forecasts; and assessment of statewide and national retail trends.

Results from these various analyses have been triangulated to measure the magnitude of market potential for new retailers; restaurants and eateries; revenue-generating entertainment and recreational venues; and complementary types of businesses. The results of the analyses are also documented among the attached Section A through Section J, with numerous Infographics, maps, and other supporting exhibits.

Geographic Perspective – This analysis focuses on the Lake Center District within the City of Portage and its primary (60%) trade area. The district includes all properties fronting along Portage Road Corridor; extending from the north side of East Centre Avenue to the south side of East Osterhout Avenue. The district also includes a “Hub” located at the “pinch point” between West Lake and Austin Lake. For additional geographic perspective, see the aerial photo in attached Section A; and planning maps in Section J.

Six Geographic Levels – Listed Largest to Smallest

1. The State of Michigan = The Primary State
2. Kalamazoo County, Michigan = The Primary County
3. The City of Portage, Michigan = The Primary City
4. Two- and Five-Mile Rings around the Lake Center District = For perspective only.
5. The Lake Center District's Primary Trade Area = The source of 60% of retail sales.
6. The Lake Center District = Portage Rd Corridor from Centre to Osterhout Avenues.
7. The Lake Center Hub = The “pinch point” between West and Austin Lakes.

Primary Trade Area – A primary trade area has been delineated for the Lake Center District with a boundary shown on the very first page in Section D, attached. The primary trade area generally includes Lovers Lane, Portage Road, and Sprinkle Road, which are all north-south streets. It represents the geographic area from which about 60% of all retail sales will be derived for existing and new retailers within the Lake Center District. The balance of 40% of retail sales will be derived by visitors who are arriving from beyond the trade area.

Geographic Guides – To help readers navigate the attached exhibits, a map is included with each set of corresponding data. Wherever there is a map of Kalamazoo County, the data following that map pertains specifically to that county. Similarly, wherever there is a map of the City of Portage, the following data pertains to the entire city. And, wherever there is a map of the primary trade area, the following data also pertains to that study area as delineated for the Lake Center District.

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Review of Prior Work
Retail Market Study
Portage Lake Center District

Westnedge Avenue and Shaver Road are not included in the primary trade area for the Lake Center District. Retail destinations along these corridors have been addressed in a separate city-wide retail market study that was completed by other consultants in early 2020. LandUseUSA has conducted an assessment of that prior work; and participated in phone conferences with city staff and its planning consultants to discuss its findings, conclusions, and possible implications for the Lake Center District. The most relevant observations are summarized on the following page.

- The city-wide retail study has concluded that there is a market potential for about 70,000 square feet of additional businesses in the retail trade category, which may include new retail tenants that could occupy existing vacant space. The development of new retail space is neither implied nor necessarily recommended as part of that market potential.
- In addition, the city-wide retail study has concluded that there is a market potential for about 15,000 square feet of additional establishments in the restaurant industry, including full-service restaurants, limited-service eateries, drinking establishments, and related specialty food categories. As with the conventional retail, these may fill vacant space as an alternative to building more retail space.
- The study reports that there is a surplus of retailers already serving the grocery and hardware categories; but that there is an opportunity for one new pharmacy such as a Walgreens, CVS, or some other independently owned and operated brand. These three categories (grocery, hardware, and pharmacy) are important because they can serve as small but valuable anchors in neighborhood shopping districts.
- Other categories like overnight accommodations (hotels, campgrounds, etc.), entertainment venues and recreational resources were not addressed in the city-wide study. However, a number of potential concepts were discussed during phone conferences, including amenities like splash pads, target ax throwing ranges and bars, and modern bowling alleys with bocce ball courts. The city's existing venues were also discussed, including the expanding Airway Fun Center (go carts, mini golf, arcade, bowling, lazer tag, planned mini roller coaster, and more) and Ramona Park (ball courts, beach, picnic areas, and playground).
- The city-wide figures have been verbally described as "very conservative"; and it has also been explained that any retail and restaurant space within the Lake Center District may be "above and beyond" the city-wide forecasts. In other words, it has been acknowledged that the Lake Center District is a unique place that warrants special consideration as a retail node within the City of Portage.

Conclusion and Findings
Retail Market Study
Portage Lake Center District

Market Potential – This retail market study was conducted with a cautious, conservative, and pragmatic view of the City of Portage’s Lake Center District and Hub. We have carefully weighed the evidence and concluded that there is solid and good merit in adding a small yet meaningful amount of new retail space within the district, and particularly at the “Hub”. The retail gaps and opportunities are documented among the exhibits in Section A attached to this narrative report, and a summary is provided below.

The Lake Center Hub – As shown in the very first exhibit in Section A, there is a market potential for up to 20,000 square feet of new retail space in and near the Lake Center “Hub”, or the place where West Lake and Austin Lake create a “pinch point” along Portage Road.

Existing Businesses at the Hub – The Lake Center District’s Hub and retail node currently has eight establishments offering food choices, including grocery stores, restaurants, eateries, and drinking establishments. There are also eight marine, automotive, repair, and hardline dealers and service shops; and ten fitness, financial, and service-based businesses. In addition, there are also four traditional retail merchants, including a drug store with gift shop, furniture store, gifts and home décor shop, and florist and garden shop.

Existing Establishments at the Hub
Grocery, Restaurants, Eateries

1. H&B Market – Grocery, convenience, liquor, and more
2. Daane’s – Beer, wine, spirits, convenience
3. Sangria Shop – Distillery, winery
4. Cove Lakeside – Bistro, dining establishment
5. Bucky’s – Café, dining establishment
6. D&R’s Daily Grind – Café, dining establishment
7. Youz Guys – Sausages, prepared meats
8. Biggby – Café, coffee shop

Note: Inventory is continued on the following page

Existing Retail Merchants at the Hub
Novelty, Gift, Miscellaneous

1. Westlake Drug – Pharmacy with gift shop
2. Liberty Square – Furniture, Amish designs
3. troVe – Gifts, home furnishings, décor
4. Polderman's – Florist and garden shop

Existing Hardlines at the Hub
Marine, Automotive, Hardware

1. The Edge – Boat dealership, sporting goods
2. Boat City Marine – Boat dealership, sporting goods
3. Docks Unlimited – Marine supplies
4. Nelson's Do-It Best – Hardware, garden supplies
5. A&M Outdoor Power – Power equipment, repair
6. Deals Unlimited – Used car dealership
7. Keystone – Automotive repair, service
8. Monkey Wrench – Automotive repair, service

Existing Services at the Hub
Fitness, Finance, Licensed Professionals

1. Walker's Tae Kwon Do Academy – Fitness, martial arts
2. Southside Dojo – Fitness, martial arts
3. Shear Reflections – Personal care salon
4. M&T Hair design – Personal care salon
5. Austin Lake Chiropractic – Health, wellness
6. Lakeview Animal Hospital – Veterinarian
7. Arbor Financial – Credit union
8. Davis & Associates – Accountants, Tax Professionals
9. AFC – Adult & Family Consulting
10. Green Earth – Hydroponics supplies
11. The Cleaning Authority – Home cleaning services

Recommendations – The optimal mix of new anchor stores will include hardline retailers focused on new products in the categories of unique sporting goods (club cars, scooters, bicycles, etc.); plus unique home furnishings and décor stores that complement Liberty Square, Westlake Pharmacy, troVe, and Polderman's.

The mix of tenants should also include eateries in niche food categories, such as Asian, Wine and Cheese, and/or Mediterranean offerings. Eateries could be enhanced with a variety of food vendors or food trucks. The mix should also include complementary cultural arts venues, such a seasonal maritime museum, antique boat showroom, and visitor's center.

Site Selection at the Hub – On the aerial photo enclosed in [Section A](#), the Lake Center District's Hub generally pivots around Parcel #5, which has frontage along the West Lake shoreline. It was previously occupied by a seasonal drive-in fast food eatery, and the structure has remained. However, it recently sold to new owners, who have proposed attached townhouses for the site. Ideally, these would be townhouses (or even lofts) above waterfront retail, plus a boardwalk with piers that are integrated into the public realm.

Two pages of photos and images are provided in [Section A](#) to convey this preliminary vision for properties along the Hub's waterfront and along the east side of Portage Road. The first map in [Section J](#) also conveys recommendations documented in the city's 2014 Comprehensive Plan. These photos, images, and maps will be updated based on stakeholder input during upcoming workshops and meetings.

Business Retention and Growth – To achieve the optimal market potential, other sites will also need to be activated into a cohesive mixed-use project. Ideally, these other sites will be as close as possible to Parcel #5, so as to create a tightly knit project that is pedestrian-scale and easily walkable.

Existing businesses like H&B Market and Nelson's Hardware should also consider building new stores that serve as anchors within one or more mixed-use projects. Even if the new store sizes are the same, new stores could yield a +20% to +30% increase in annual sales. For-lease townhouses or lofts above or behind the stores would also generate significant rental income for the land owners and investors.

Additional Opportunities – In addition to the market potential of up to 20,000 square feet of new retail space at the Lake Center Hub, there is also an additional market potential for up to 20,000 square feet of new business space at other locations within the Lake Center District. Again, this district includes the Portage Road corridor from Centre Avenue south to Osterhout Avenue; and the optimal mix of retailers will complement and enhance the established businesses that are already located within this same area.

Recommended categories include home improvement, new home construction, landscape design, interior design, and related types of activities. Customers will include home owners with discretionary income to invest in ongoing home improvements. Customers will also include established businesses in the construction trades and focused on building, remodeling, and expanding both residential and commercial space.

Site Selection in the District – New retailers seeking locations along Portage Road should strive to cluster together and near existing retailers and businesses. Most of the new retailers should try to locate north of the Hub and near East Centre Avenue, rather than south of the Hub or near East Osterhout Avenue. Again, the aerial photo in [Section A](#) identifies several infill sites that could accommodate new businesses. Photos are also provided to convey some possible formats, including mixed use.

Retail Strengths and Gaps – The last two pages in [Section A](#) include a set of histograms with a summary of retail strengths and gaps throughout the Lake Center District's primary trade area. The two exhibits also represent a qualified summary of a retail import-export analysis, which some analysts referred to as a net "leakage" analysis. Detailed data from the retail leakage or net import-export analysis are provided in [Section B](#), also attached.

The histograms of retail strengths and gaps have been qualified to reflect the results of all analyses and models completed in this retail study. These analyses include a study of retail sales per establishment (see [Section C](#)); a cluster analysis and retail inventory by subcategory ([Section D](#)); assessment of the change in share of employment in the retail industry ([Section E](#)); inclination for lifestyle clusters and target markets to participate in various lifestyle activities ([Section G](#)); a demographic analysis focused on population, per capita income, and resident expenditure potential ([Section H](#)); and an assessment of statewide and national retail trends ([Section I](#)).

Retail Strengths and Net Import – Based on the triangulated results of the various analyses, a number of retail categories stand out as strengths for the Lake Center District. For example, building construction supplies and services has an estimated +50% net import of retail sales. Similarly, family entertainment has +45% net import; automotive services and repair shops have +40% net import; business support and marketing services have +35% net import; and gardening nurseries and florists also have a net import of +35%.

Measures of net import are based on transacted (actual) retail sales for established businesses compared to the expenditure potential of residents living within the primary trade area. For example, if established businesses in the construction supply and services category are collectively achieving \$10 million in sales, but the residents of the trade are only have the expenditure potential to support \$6 million in sales, then it can be deduced that the other \$4 million in sales is being generated by customers arriving from beyond the primary trade area.

Retail Gaps and Net Export – The inverse can also be applied when testing for retail gaps. For example, the histogram on the very last page in [Section A](#) shows that the apparel category has a net export of -90%. This is supported by market observations, with very few apparel stores existing within the primary trade area. Instead, residents living within the primary trade area are exporting most of their apparel expenditures to Crossroads Mall and other shopping destinations along the Westnedge Avenue corridor.

Net Import nearly always indicates a market strength that can be leveraged by new niche and complementary types of businesses. However, net export does not always point to a market *opportunity* for new establishments. In the case of apparel stores, there are already many choices within and near the Crossroads Mall. Even if a new apparel store were to consider opening in the Lake Center District, they would probably follow a more prudent choice of locating near the established clothing stores to leverage the synergistic benefits of clustering and critical mass. These types of locational criteria and considerations have been carefully weighted and integrated into the recommendations for new retail in the Lake Center District.

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Guide to Additional Attachments Retail Market Study Portage Lake Center District

Introduction – The balance of this narrative serves as a guide to the remaining exhibits in [Section B](#) through [Section J](#). It does not include a detailed explanation of the data sources, methodologies, or analytic results. Rather, it focuses on key observations, relationships between the variables, and conclusions for the retail market potential. Again, readers are encouraged to browse the attached Infographics, study the data, and strive to gauge probable implications for new retail tenants, merchants, and stores in the City of Portage's Lake Center District and its Hub.

Section B – Retail Leakage | Net Import-Export

All exhibits and analyses enclosed within Section B represent results for the City of Portage compared to other cities and villages throughout the State of Michigan. The very first page in Section B provides a map of Portage for geographic perspective. All other exhibits in that section are scatter plots demonstrating the relationships between market share and per capita income. Each observation represents a single place in the state; and Portage's position on each scatter plot is highlighted with a red star.

Each scatter plot displays the data for a discrete retail subcategory (see the summary listed below). In general, categories with net import indicate city-wide market strengths that could be leveraged by niche businesses; and categories with net export indicate gaps and possible opportunities for new stores.

For about half of the categories, Portage's market share is high when compared to other cities with similar income levels. This indicates considerable net import into the city, which can be attributed to the regional draw of the Crossroads Mall and clusters of chain stores along Westnedge Avenue.

Summary of the Net Import-Export Analysis The City of Portage, Michigan

High Net Import

- Clothing, Accessories Stores
- Restaurants, Drinking Establishments
- Furniture, Home Furnishings
- Sporting Goods, Hobby, Book Stores

Moderate Net Import

- General Merchandise Stores
- Electronics, Appliance Store

Balanced Import and Export

- Food and Beverage Stores
- Pharmacies and Drug Stores
- Automotive Parts, Tires, Accessories
- Building and Garden Materials, Supplies

Moderate Next Export

- Motor Vehicle and Parts Dealers

Section C – Retail Sales per Establishment

Introduction – The exhibits in Section C compare retail sales per establishment among the highest volume stores throughout the City of Portage and the Lake Center District's primary trade area. This information can be used as general guide for prospective developers, entrepreneurs, and merchants that might be interested in opening a new business in the market. It has also been used to estimate the average annual sales of new stores that are recommended within the retail strategy (see the very first page of Section A).

Results for the City of Portage – The first exhibit in Section C is a map of the city, followed by a one-page table that is also for that same geography. In the City of Portage, one of its supercenter or discount stores has the highest volume with \$135 million in reported annual sales. The store with the second highest volume is a grocery store or a supermarket with reported sales of \$47.5 million; and the third highest volume store is a home improvement store with \$40.5 million in sales.

Although these are reported sales for existing stores located in the city, individual business names have been intentionally suppressed for confidentiality. Even so, it is fairly easy to deduce that the supercenter could be Meijer; the grocery store might be Fresh Thyme; and the home improvement store is either Lowe's or Home Depot. For additional reference, Section C includes a collage of most chain big-box stores located throughout the City of Portage.

Results for the Lake Center District – A similar table of reported sales for existing stores is provided for the Lake Center District's primary trade area. Within the trade area, the highest-revenue store is an automotive services and repair business with \$22 million in reported annual sales. This is followed by a convenience store with a gasoline station with \$10 million in sales; and a team sports center with \$9.5 million.

Comparison of Average Sales – Within the City of Portage, average sales among the top 40 stores is about \$6 million. In comparison, the average sales for the top 40 retailers in the Lake Center District's primary trade area is about half, or \$3 million. This can be partly attributed to differences in the store sizes – Westnedge Avenue has many chain big-box stores with large footprints; whereas most of the stores in the Lake Center District's primary rated area are considerably smaller.

The differences in sales can also be attributed to the size of the trade areas. Crossroads Mall and national chain stores clustered along Westnedge Avenue have a large trade area that encompasses most of Kalamazoo County. In comparison, the Lake Center District and Hub have much smaller trade area.

Section D – Retail Inventory by Subcategory

Introduction – Exhibits in Section D begin with a map of the Lake Center District's primary trade area, and is a reminder that the following pages are for that same geography. The map is followed by three pages of histograms that summarize the retail inventory for the district's primary trade area. The first page of histograms focuses on restaurants, eateries, and grocery stores. Conventional retail categories are listed on the second page of histograms; and arts, entertainment, recreation, sporting goods, and overnight accommodations are at the bottom of the third page.

The Summary Inventory – Within the Lake Center District's primary trade area, there are 25 existing businesses (a.k.a., "retailers") in the category of construction supply and services; 15 businesses in automotive services and repair; and 10 businesses in the categories of personal care and salons. All of the other subcategories include eight or fewer establishments, each.

On the summary histograms, a number of niche categories are listed without any establishments. These are intended to highlight some of the gaps and opportunities for new establishments. They include a restaurant with a Mediterranean cuisine; full-line grocery store (i.e., more than a neighborhood convenience store and/or liquor store); window treatment store; mobile and telecommunications dealer; and sporting goods store focused on bicycle sales and rental. These are just a few of the retail categories recommended as new businesses for the Lake Center District and its Hub.

The Detailed Inventory – The histograms are followed by a detailed list of all established and existing retailers located throughout the Lake Center District's primary trade area. The list has been tabulated and summarized into the histograms. The inventory is based on field and internet research - but not every single business has been field-verified. In most (but not all) cases, each business is assigned to only one category. The list comes with some imperfections, and refinements are unlikely to alter the overall conclusions.

Section E – Change in Share of Employment

Change in Share of Employment – The very first exhibit in Section E is a map of Kalamazoo County, which indicates that subsequent exhibits are also for that same geography. The map is followed by three pages of line charts for three industry sectors: 1) retail trade; 2) accommodations and food services; and 3) arts, entertainment, and recreation.

The charts show each respective category's share of total employment over time and indexed back to the year 2001. On each of the three charts, the results for Kalamazoo County are shown in dark blue (or black), and other comparative counties are shown with grey dotted lines.

The first time-line chart shows that employment in the retail trade has been slowly declining as a share of total for the county and also for most other comparative geographies. There are some surprising exceptions like Ingham County (East Lansing) and Genesee County (Flint), which have benefited from some recent growth in retail employment.

Overall, these line charts suggest some modest and gradual retail contraction within Kalamazoo County. However, the timeline data does not plummet downward, which is what one might expect if there were a “retail apocalypse” underway. We also know from other statewide and national data that growth in the food services (restaurant) and arts and entertainment categories are helping offset modest declines in retail trade. The results for Kalamazoo County appear to uphold this general observation.

Employment by Retail Category – The last exhibit in Section E is a comparison of the City of Portage to Kalamazoo County, with estimated employment shares by retail sub-category. About 26% of retail, hospitality, and related service jobs are within restaurants, eateries, and drinking establishments. For the City of Portage, an additional 14% of retail and related jobs are in the general merchandise category, followed by business support services (13%), miscellaneous retailers (10%), and apparel and accessories (6%).

There is only one category where the employment in Kalamazoo County is higher than the City of Portage. Specifically, 5% of the county's retail and related employment is at grocery and food stores. In comparison, only 3% of the city's retail and related employment is in that same category. This reinforces the conclusion that grocery stores are generally under-represented in the city, and that the category is a viable opportunity for new stores. (Note: Supercenters and membership warehouse clubs are included in the general merchandise industry. They are not technically part of the grocery store industry).

Section F – 71 Lifestyle Clusters

The very first exhibit in Section F is a map showing two-mile and five-mile rings around the “Hub” of the Lake Center District in the City of Portage; and all subsequent histograms in that section are also for those same rings. The first two pages of histograms represent a set of exhibits for the two-mile ring, and they should be viewed side-by-side.

In general, there are a total of 71 lifestyle clusters that have been defined across the nation. The last two pages of Section F provide a one sentence description of each of the 71 lifestyle clusters.

The most affluent cluster is “American Royalty” – but there are only two of these households residing within two miles of the Lake Center District. The second most affluent cluster is “Platinum Prosperity” – and there are 182 of these households residing within two miles of the district. At the other end of the spectrum, the poorest lifestyle cluster is “Tough Times” – and there are three of these households residing within two miles of the Lake Center District.

The results for the two-mile ring are followed by results for the five-mile ring. The most prevalent lifestyle clusters living within two and three miles of the Lake Center District are also summarized on the following page.

When any given lifestyle cluster is “targeted” with a certain product, such as retail store or new attraction, then that lifestyle cluster becomes a “target market”. Understanding the lifestyle preferences of target markets like “Sports Utility Families” and “Family Fun-tastic” can be valuable when considering feasibility of new sporting goods store, such as a bicycle shop.

Similarly, the consumer preferences of “No Place Like Home” and “Platinum Prosperity” can help support a new store offering home furnishings and décor. The spending behavior of these and other target markets have been reflected in the retail recommendations for the Lake Center District.

Summary of Prevalent Lifestyle Clusters
Two- and Five-Mile Rings around the Hub

	2 Miles	5 Miles
C11 Aging of Aquarius	632	1,916
J34 Aging in Place	611	2,230
A04 Picture Perfect Families	394	1,251
E20 No Place Like Home	367	1,617
C14 Boomers, Boomerangs	333	1,210
Q62 Reaping Rewards	279	748
D15 Sports Utility Families	262	985
B08 Babies and Bliss	259	895
O51 Digital Dependents	188	1,428
F22 Fast Track Couples	184	758
D16 Settled in Suburbia	183	695
A02 Platinum Prosperity	182	645
Q64 Town Elders, Leaders	156	715
I31 Blue Collar Comfort	149	844
E21 Unspoiled Splendor	113	700
Q65 Senior Towers	100	750
L42 Rooted Flower Power	53	998
B09 Family Fun-tastic	44	926
K40 Bohemian Groove	25	1,006
O54 Striving Singles	8	1,223

Section G – Participation in Lifestyle Activities

Introduction – Exhibits in Section G represent the primary trade area for the Lake Center District, which is delineated on the map (the first page in the section). Within the subsequent histograms, the primary trade area is represented by the blue bars; and averages for the State of Michigan are represented by grey bars.

The data demonstrates the propensity of lifestyle clusters within the primary trade area to engage in a variety of activities, such as shopping and purchasing; attendance at gatherings in public places; leisure activities and hobbies; vacation travel; sports and outdoor activities focused on lakes; and other types of individualized outdoor and indoor sports.

Key Observations – In general, residents living within the Lake Center District's primary trade area are consistently more inclined to participate in most of types of extracurricular activities when compared to Michigan Averages. There is only one exception: local residents are only slightly less likely to browse stores or consider shopping as a great way to relax.

Overall, 80% of all residents would agree that thrifty spending is important. Aside from shopping, 68% also enjoy going to the movies; 65% are inclined to take a domestic vacation; 63% enjoy going to restaurants; 42% will do some gardening as an activity; 34% will seek out a public beach; 31% will go walking for fitness or exercise; 27% will attend a concert; and 24% will experiment with cooking for fun.

These percentages and their relative importance can help cities like Portage prioritize investment into placemaking amenities that might be intended to attract more shoppers, tenants, and residents. For example, if 68% of the residents will attend a movie but only 20% will go to a theater production or dance performance, then a summer movie series in the park might take priority. Similarly, if 42% of residents will do some gardening but only 24% cook for fun, then a community garden might also be a first priority.

Section H – Market Parameters by Geography

15-Minute Drive-Time Analysis – The first exhibit in Section H shows the results of a 15-minute drive-time analysis from the Lake Center District's Hub. It is relatively easy to reach the Hub within 15 minutes from Interstate 94, Highway 131, and from all four directions. This information could prove helpful in marketing the node as a visitor destination. For example, welcome signs could be placed at the highway interchanges, encouraging traffic to “Visit the Lake Center District - Just 15 minutes south”.

Population and Per Capita Income – The second map in Section H shows the two mile and five mile rings around the Hub, indicating that the subsequent two pages of demographic data are for those same geographies. The five mile ring is nearly equivalent to the 15-minute drive-time distance.

There are nearly 13,000 residents living within two miles of the Hub, and over 66,000 residents living within five miles. The per capita income is about \$35,000 within five miles of the Hub. Although households with frontage along West and Austin Lakes most certainly have higher incomes, the average within two miles is still only at about \$37,500.

Resident Expenditure Potential – Population and per capita income are important variables because they collectively generate a total personal income that is used to estimate and forecast resident expenditure potential on retail categories. For example, the five mile ring has a population of about 66,000 residents and a per capita income of about \$35,000. This means that the total personal income for the area is \$2.31 billion ($66,000 \times \$35,000 = \$2,310,000,000$).

Sales as a Share of Income (Market Share) – Based on statewide averages, the typical Michigan resident spends about 44% of their income on brick-and-mortar retail sales (for reference, see the pie chart at the bottom of the second page in Section I). The expenditure potential of residents living within five miles of the Lake Center District's Hub is about \$1 billion ($\$2.31 \text{ billion} \times 44\% = \$1,016,400,000$). These figures have been integrated into the various analytic models, and particularly the analyses of net import-export and “leakage”.

Sales Forecasting – Population growth has been slow to moderate within the City of Portage; the Lake Center District's primary trade area, and its two and five mile rings. However, income growth has been favorable and the city's per capita income is forecast to approach \$43,000 by the year 2025 - representing a 3.5% compound annual rate of growth.

The 3.5% compound annual growth rate in income can be useful in forecasting similar growth in sales for existing and new retailers. For example, if a merchant achieved \$3.0 million in annual retail sales for year-end 2019, then sales should theoretically increase to about \$3.7 million by the year 2025. Reminder: None of the sales figures in this report have been adjusted to account for economic and retail impacts from the current health pandemic brought on by COVID-19.

Additional Resources – The demographic profiles in attached [Section H](#) also include age brackets and marital status of residents within the two-mile and five-mile rings, the City of Portage, and Kalamazoo County. Other variables are provided in the Lake Center District's Housing Market Study, including households by income, housing units by tenure, and housing vacancies. In addition, the Lake Center District's Commercial Market Study includes some data on educational attainment and employment. Finally, demographic profiles for each of the city's five subareas are included in the city-wide housing study.

[Section I](#) – Retail Trends – Michigan and Nationwide

Introduction – The first exhibit in [Section I](#) is a map of the State of Michigan, which is a clue that the subsequent data is for that same geography. The first page of histograms includes two charts – a histogram at the top of the page, and a pie chart at the bottom.

Sales as a Share of Income (Market Share) – Average annual expenditures as a share of per capita income (a measure of “market share) has held relatively steady over time, with the exception of some declines during the Great Recession. On average, Michigan's residents spend about 50% of their income on retail, including 44% on brick-and-mortar sales and 6% on e-commerce sales offered by those same stores (see the pie chart). In addition, they spend about 7% of their income on restaurants, eateries, and drinking establishments. The balance of 43% is spent on other expenses, including mortgages, rents, debt, other e-commerce (excluding online sales by brick-and-mortar retailers), education, vacations, and investments.

Retail Sales per Square Foot – The second page of histograms demonstrates the average retail sales per square foot for all retailers in regional and neighborhood shopping centers, and generally excludes free-standing stores and downtown merchants. This exhibit shows the range of sales productivity that might theoretically be achieved by existing and new retailers.

For example, book stores typically achieve sales on only \$180 per square foot, and this low productivity has contributed to their gradual decline. At the high end, jewelry and fashion accessory stores can have sales approaching \$1,000 per square foot; and electronics and home entertainment stores could even surpass that. Note: this does not necessarily mean that electronics and home entertainment stores are always profitable.

The average productivity for all retailers across the State of Michigan is about \$350 per square foot. The Crossroads Mall should be able to approach this average; whereas stores within the Lake Center District and its Hub should anticipate significantly lower productivity levels, on the order of \$250 per square foot (-30% lower). Again, there will also be significant variances between retail subcategories; and high productivity is not necessarily a promise of profitability.

Monthly Sales Nationwide – Section I also includes four pages of line charts demonstrating monthly retail sales trends over time and since 1992. Aside from the Great Recession, retail sales have continued to increase over time. (Note: The data in the charts have not been adjusted for inflation.)

Downward trends and gradual losses in some of the retail subcategories can be attributed to an ongoing contraction and “right-sizing” of department stores, big-box formats, and chain stores across the nation, which has accelerated over the past decade. Even so, this is not indicative of a “retail apocalypse”. Rather, it is a correction that occurring in the industry as a response to over-building, poor choices in site selection, shifting consumer preferences, and some negative impacts from e-commerce.

Even with market transitions underway, the retail trade industry as a whole will continue to grow, and with some winners and some losers. Most grocery stores and restaurants will continue to thrive, as well as discount, dollar, home improvement, furniture, and home furnishings stores. In contrast, department stores and mall anchors will continue to downsize and close stores, which will impact apparel stores that traditionally relied on them to generate mall traffic. Other categories like electronics, appliances, and book stores will continue to be impacted by the ease of buying standardized merchandise categories online.

Trends in E-Commerce – Online accounted for about 2% of total retail sales in the early 1990s; and today it is now approaching 14%. Most industry analysts and economists agree that e-commerce will continue to grow (but at a slowing rate) until it captures about 30% of the industry – and then it will plateau. An additional histogram in Section I demonstrates that the rate of growth in the e-commerce sales is slowing, which will contribute to that inevitable plateau.

Chain Store Openings and Closings – Two other charts in Section I provide lists of national chains stores that either added or closed stores in 2019 and 2020, and prior to the recent pandemic and economic crisis. An estimated 45 national chain stores had been expanding; whereas about 52 chains had been contracting and downsizing. The 45 expanding chains were collectively opening 5,283 new establishments - which represents just 0.5% (half of one percent) of all retail establishments across the nation.

Including Payless Shoes, the downsizing chains were closing 10,119 establishments - which collectively represent just 1% of all retail establishments. In general, one new store is opening for every two stores that close. In addition, one new restaurant is opening for every store that closes. In other words, growth in the restaurant industry is helping offset losses among retailers.

Although big-box department stores, national apparel chains, electronic and book stores, and other categories are downsizing; other sub-categories of retail and smaller merchants are expected to continue growing. The stores that are closing are more likely to be chains that were over-built, were located in redundant locations, and failed to keep up with shifting lifestyle preferences and consumer trends. The newest stores are more likely to be small, independent merchants that are independently owned and operated. They are also tending to gravitate toward traditional downtowns, new town centers, and open-air pedestrian malls.

The Halo Effect of Omni-Channel Marketing – Near-term and as we recover from the economic crisis of 2020, independent merchants that successfully leverage the “halo effect” of omni-channel marketing will have the best chance of success. There is clear evidence that online sales, phone orders, click-and-collect (buy online, pick up at the store), and other strategies can help build customer loyalties and draw repeat shoppers back into the brick-and-mortar stores (see the very last page in [Section I](#) for a diagram).

Section J – The 2014 Comprehensive Plan

Introduction – The last section of this retail market study provide reference maps that have been extracted from the City of Portage's 2014 Comprehensive Plan. These maps include two pages of Lake Center Corridor Recommendations, plus city-wide maps showing the locations of community facilities and future land uses. The Lake Center Corridor Recommendations will be updated by Farr Associates based on stakeholder input during workshops and public events that will take place in the summer of 2020.

Average Daily Traffic Volumes – The very last exhibit in [Section J](#) shows average daily traffic volumes throughout the City of Portage. Average daily traffic volumes are highest along Interstate 94 and exceed 100,000 vehicles near the interchange with Highway 31. Average daily traffic volumes also exceed 40,000 along Westnedge Avenue and near the Crossroads Mall.

In comparison, average daily traffic volumes along Portage Road are almost 25,000 proximate to Interstate 94; and almost 20,000 near the Lake Center District's Hub. However, traffic volumes quickly decline south of the Hub. For this reason, most prospective new retailers and merchants will be best positioned to achieve optimal sales by choosing locations near or north of the district's Hub.

...

Closing and Next-Steps – This concludes the draft, interim, and preliminary narrative report for the Retail Market Study and for the City of Portage's Lake Center District. This narrative will remain in draft format until Farr Associates has completed the process of stakeholder engagement. The timing of those events will depend on the Governor's executive orders as they pertain to the current health and economic crisis.

LandUseUSA | Urban Strategies will participate in the stakeholder engagement process; listen to comments and questions; take notes; and then refine this narrative report. Until then, stakeholders are also welcome to contact LandUseUSA directly with any questions, information, or suggestions.

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Section A	Retail Gaps and Opportunities
Section B	Retail Leakage Net Import-Export
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Section G	Participation in Lifestyle Activities
Section H	Market Parameters by Geography
Section I	Retail Trends Michigan and Nationwide
Section J	2014 Comprehensive Plan (reference)

Section **A**

Retail Gaps and Opportunities



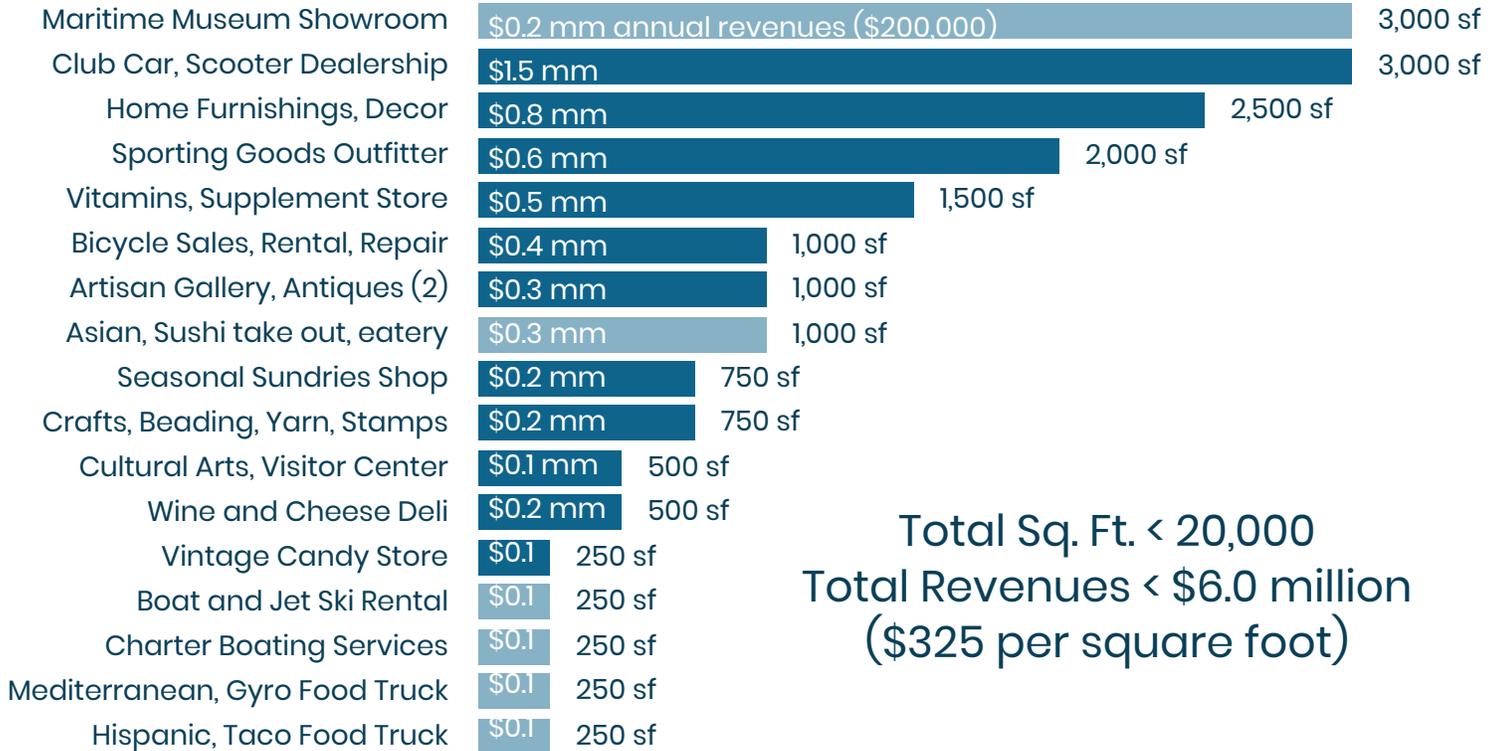
PORTAGE

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Retail Strategy | Lake Ctr District

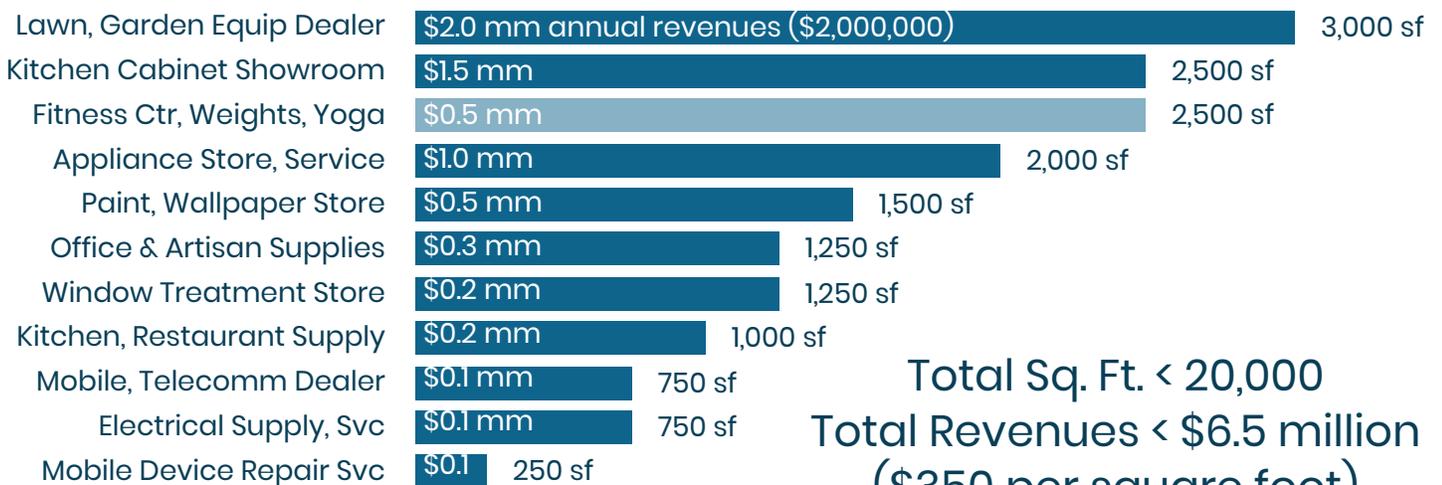
Based on transacted retail sales compared to resident expenditure potential.

In and near the Lake Center Hub



Total Sq. Ft. < 20,000
Total Revenues < \$6.0 million
(\$325 per square foot)

North and south along Portage Road



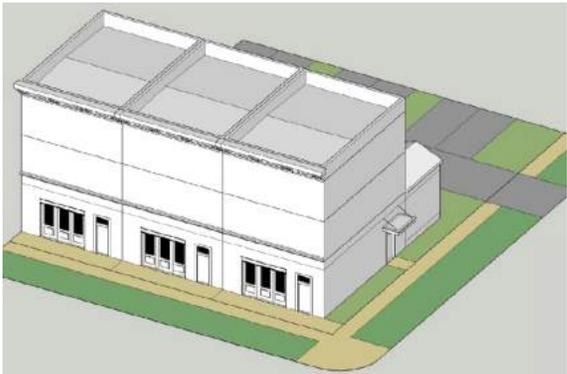
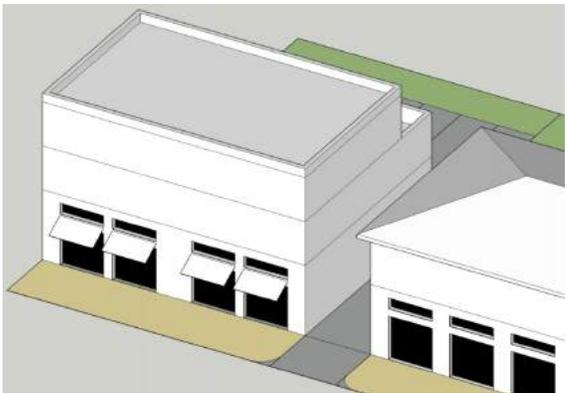
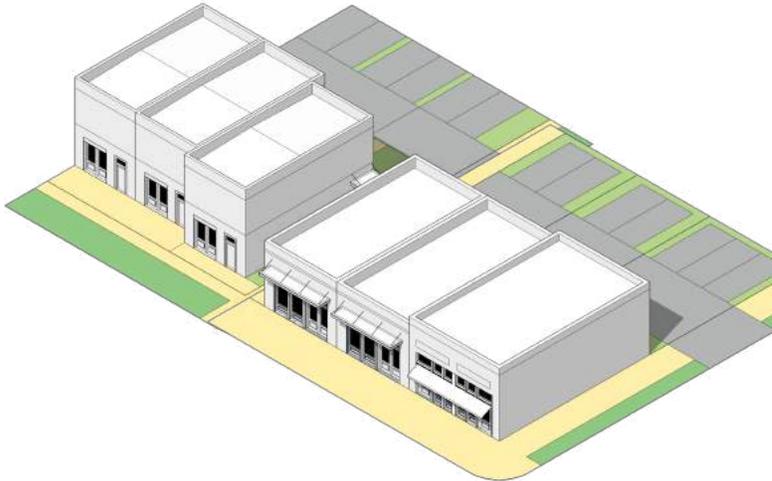
Total Sq. Ft. < 20,000
Total Revenues < \$6.5 million
(\$350 per square foot)

Underlying data (number of establishments and annual revenues) provided by ScanUS through 2019. Results based on a qualified market share analysis by LandUseUSA | Urban Strategies for the City of Portage, Michigan; March 2020.



LandUseUSA
UrbanStrategies

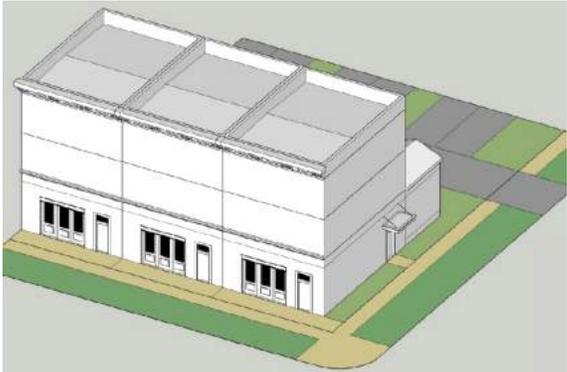
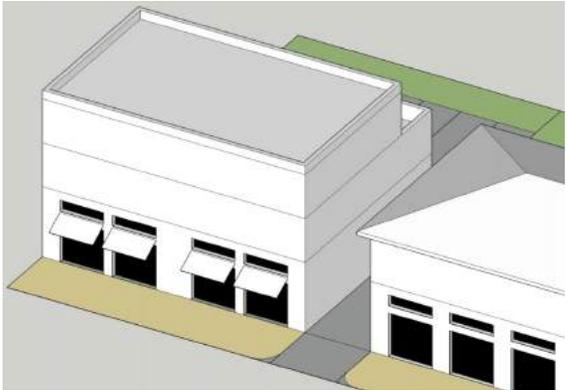
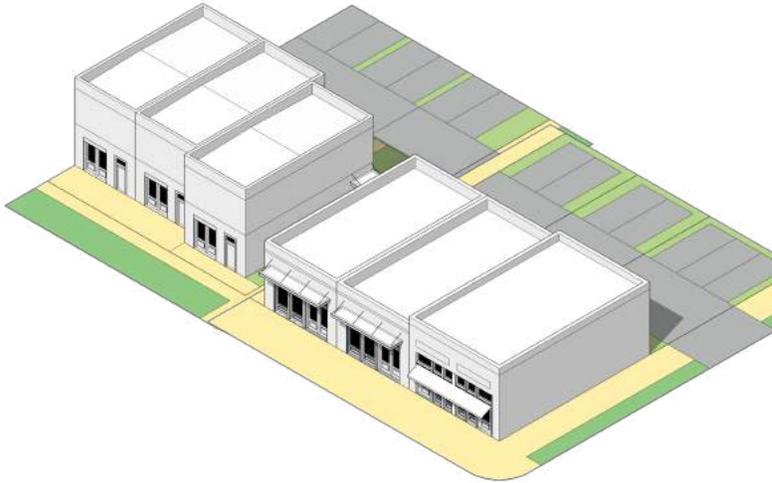
Retail and Mixed-Use Site Number 5 | Lake Center



LandUseUSA
UrbanStrategies



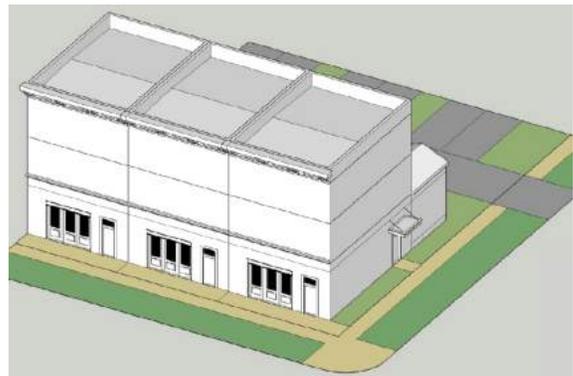
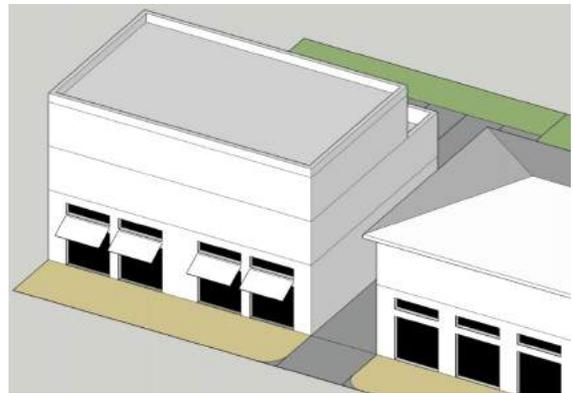
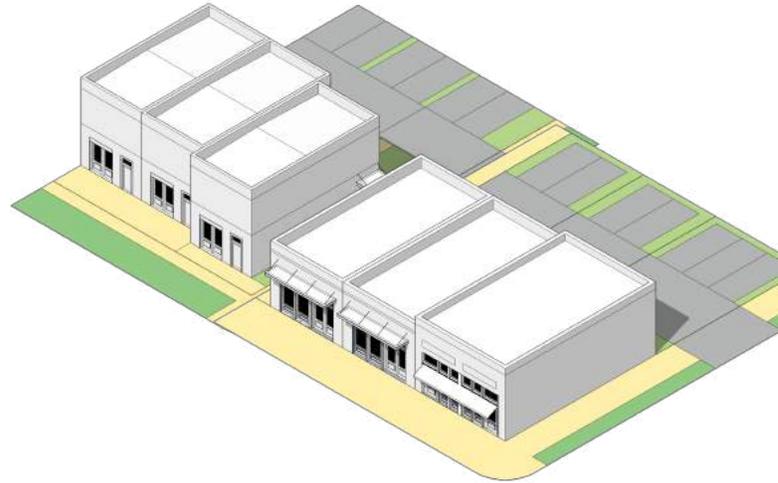
Retail and Mixed-Use Site Number 5 | Lake Center



LandUseUSA
UrbanStrategies



Retail and Mixed-Use Sites 1a, 2, 3, and 4 | Lake Center



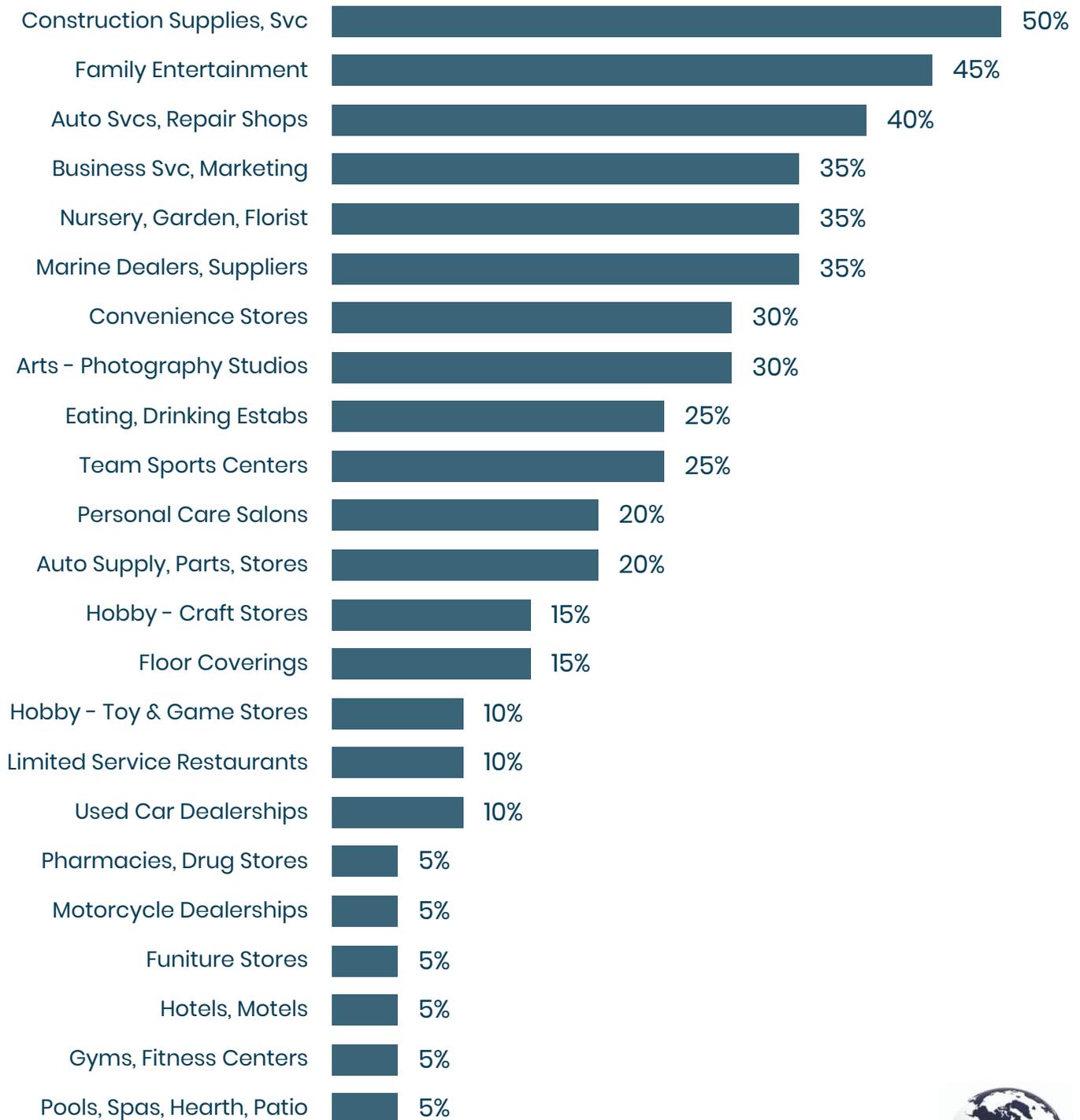


Lake Center District - Available Development Sites
Exhibit prepared by LandUseUSA with input from the City of Portage, May 2020.

Retail Strengths | Lake Ctr District

Based on transacted retail sales compared to resident expenditure potential.

Annual Net Import by Retail Subcategory



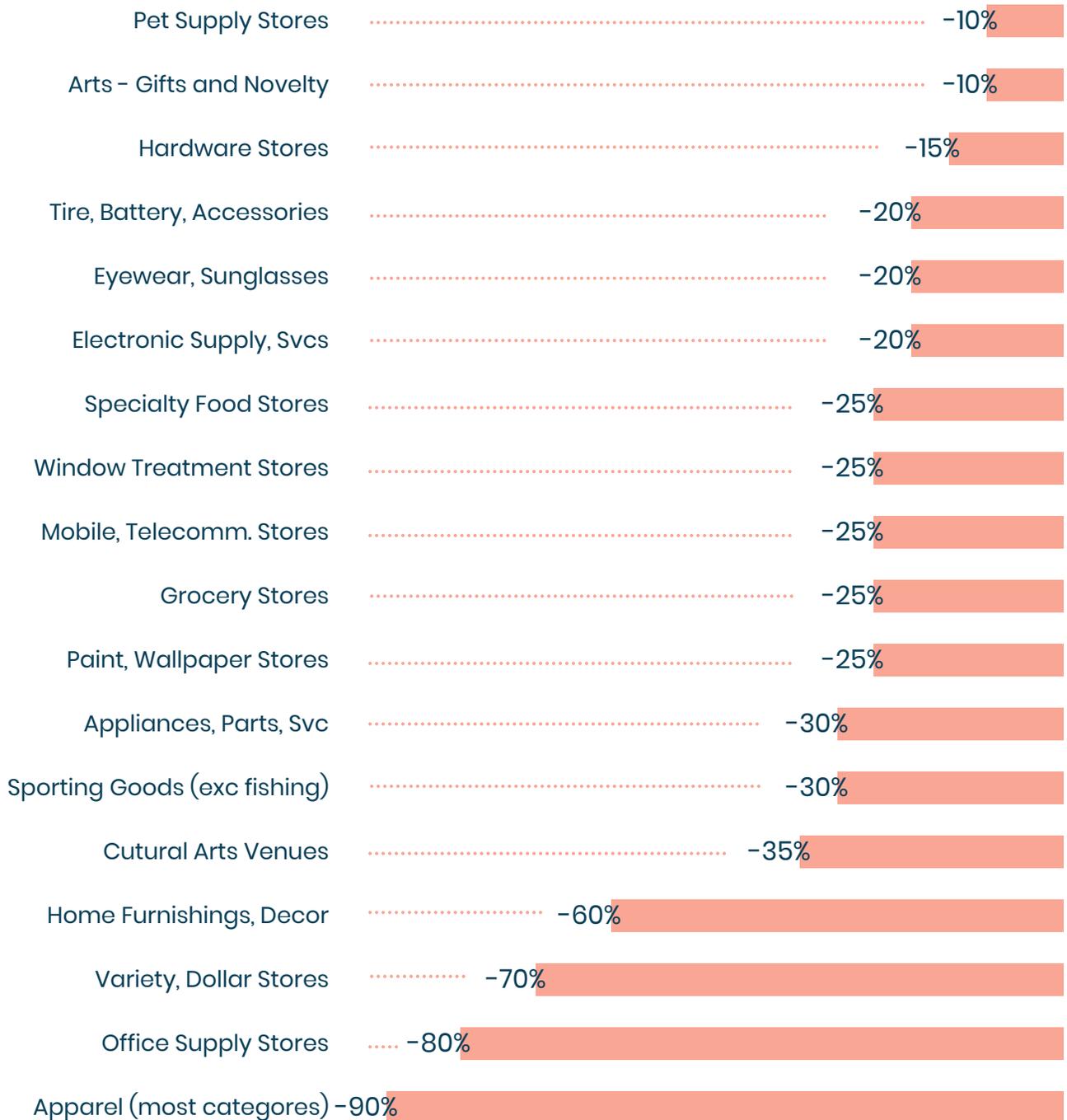
Underlying data (number of establishments and annual revenues) provided by ScanUS through 2019. Results based on a qualified market share analysis by LandUseUSA | Urban Strategies for the City of Portage, Michigan; March 2020.



Retail Gaps | Lake Ctr District

Based on transacted retail sales compared to resident expenditure potential.

Annual Net Export by Retail Subcategory



Underlying data (number of establishments and annual revenues) provided by ScanUS through 2019. Results based on a qualified market share analysis by LandUseUSA | Urban Strategies for the City of Portage, Michigan; March 2020.



Section **B**
Retail Leakage
Net Import-Export

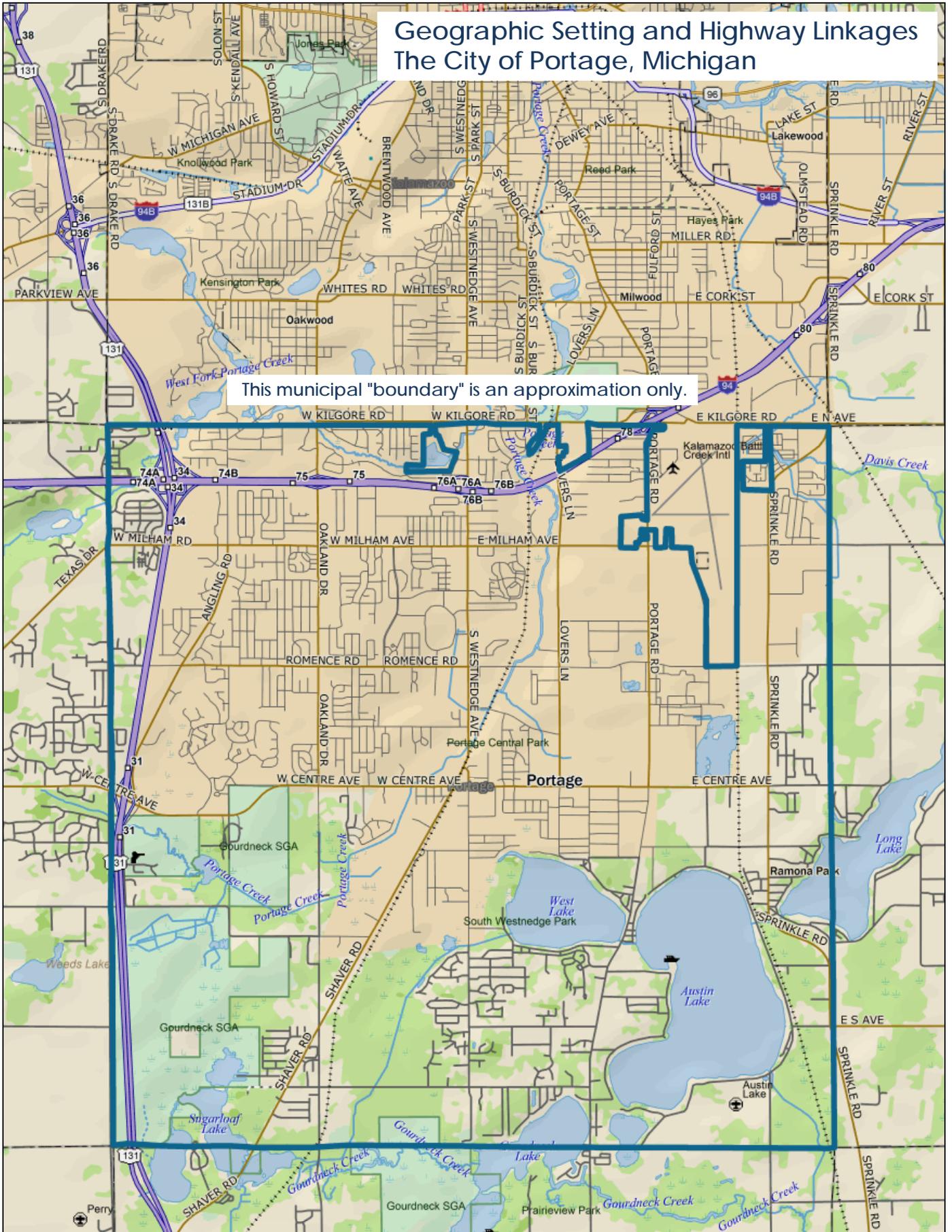


PORTAGE

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Geographic Setting and Highway Linkages The City of Portage, Michigan

This municipal "boundary" is an approximation only.



Underlying map provided by Delorme; exhibit prepared by LandUseUSA
Urban Strategies for the City of Portage; March, 2020.



1" = 1,270 ft

Market Share v. Per Capita Income

Clothing, Accessories Stores | NAICS 448

Selected Places in the State of Michigan

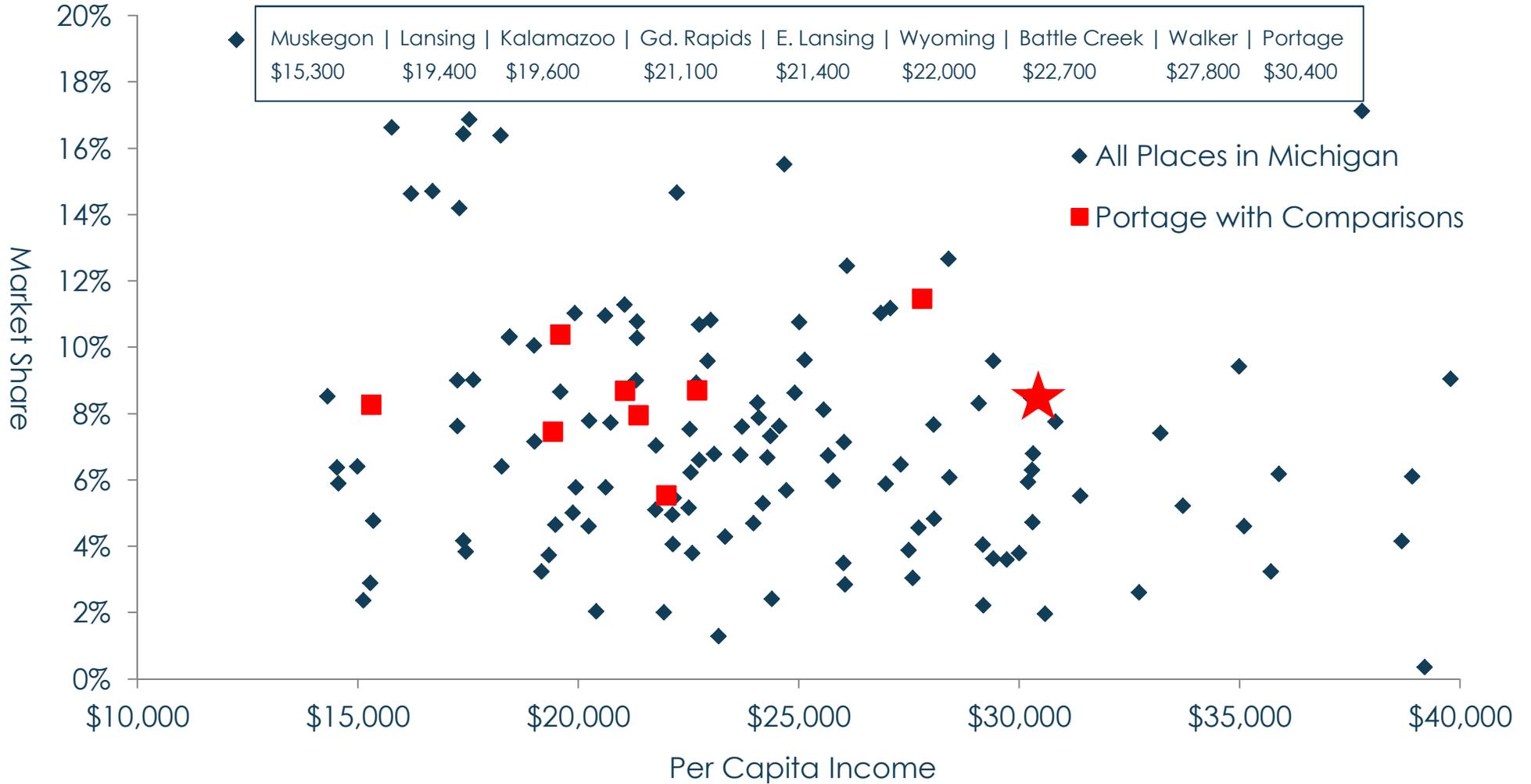


Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage, Michigan; March 2020.
 Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.
 Underlying data from the 2012 and 2017 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income

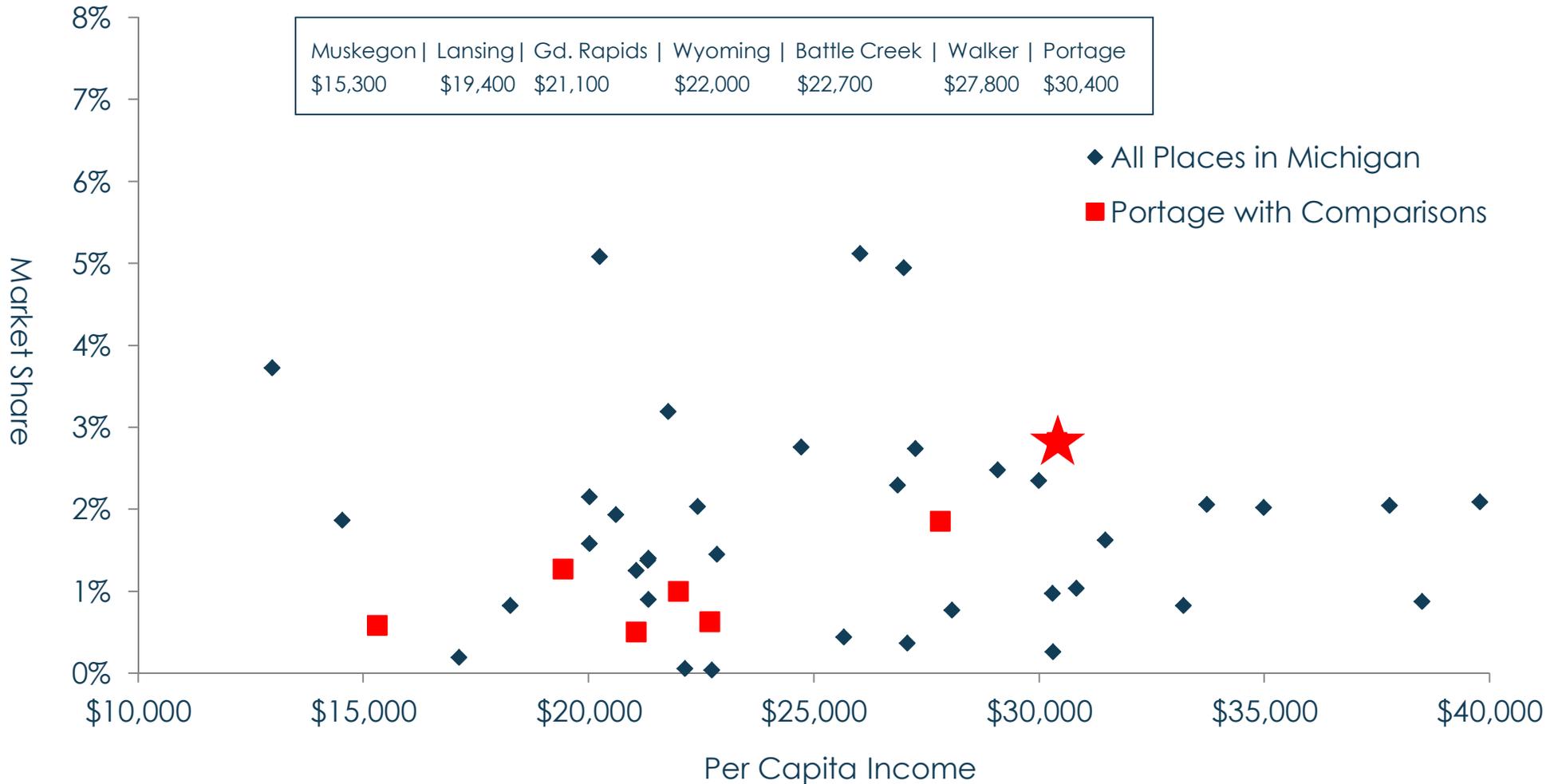
Restaurants, Drinking Establishments | NAICS 72

Selected Places in Michigan



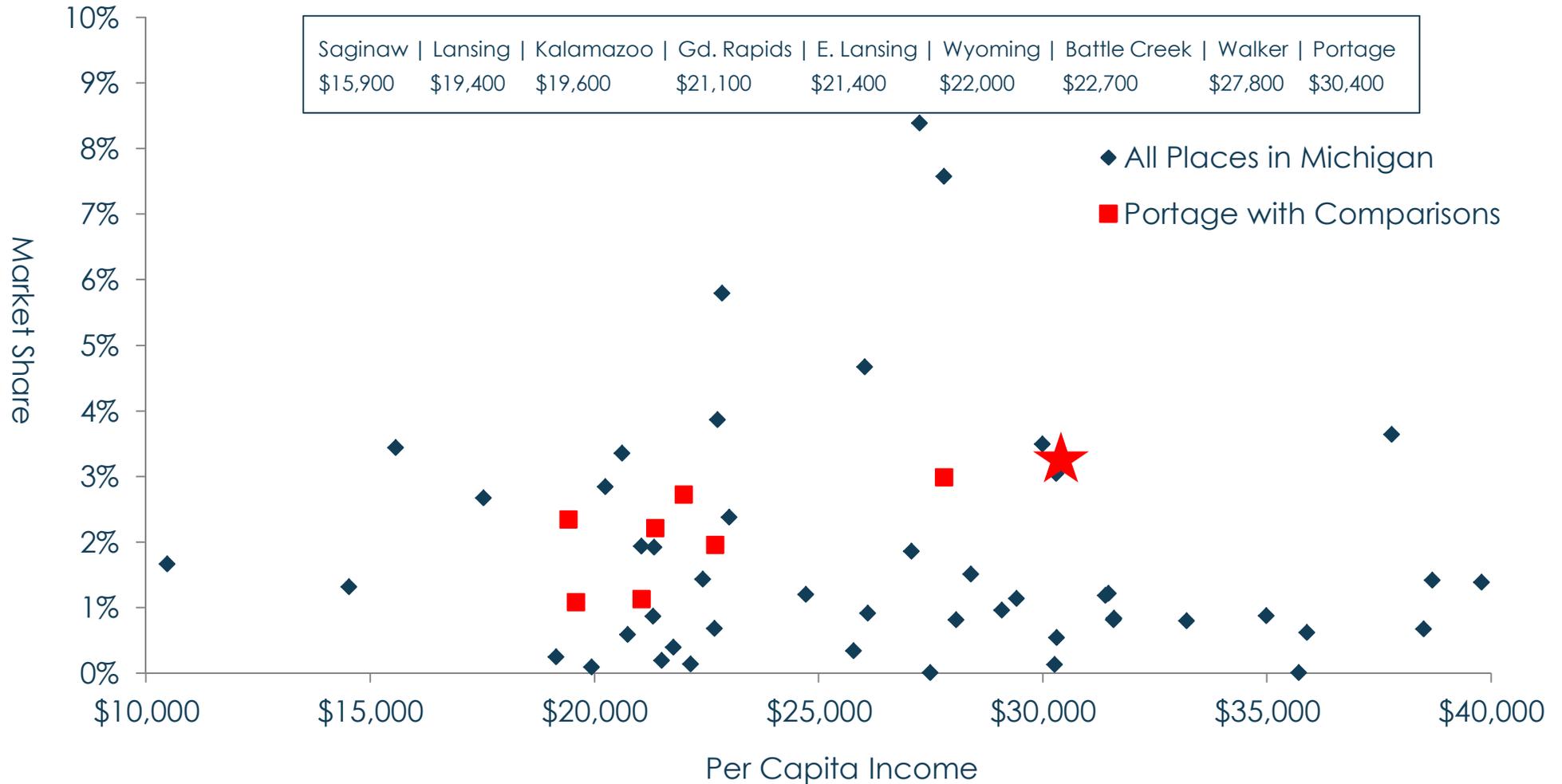
Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage, Michigan; March 2020.
 Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.
 Underlying data from the 2012 and 2017 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income Furniture, Home Furnishings | NAICS 442 Selected Places in the State of Michigan



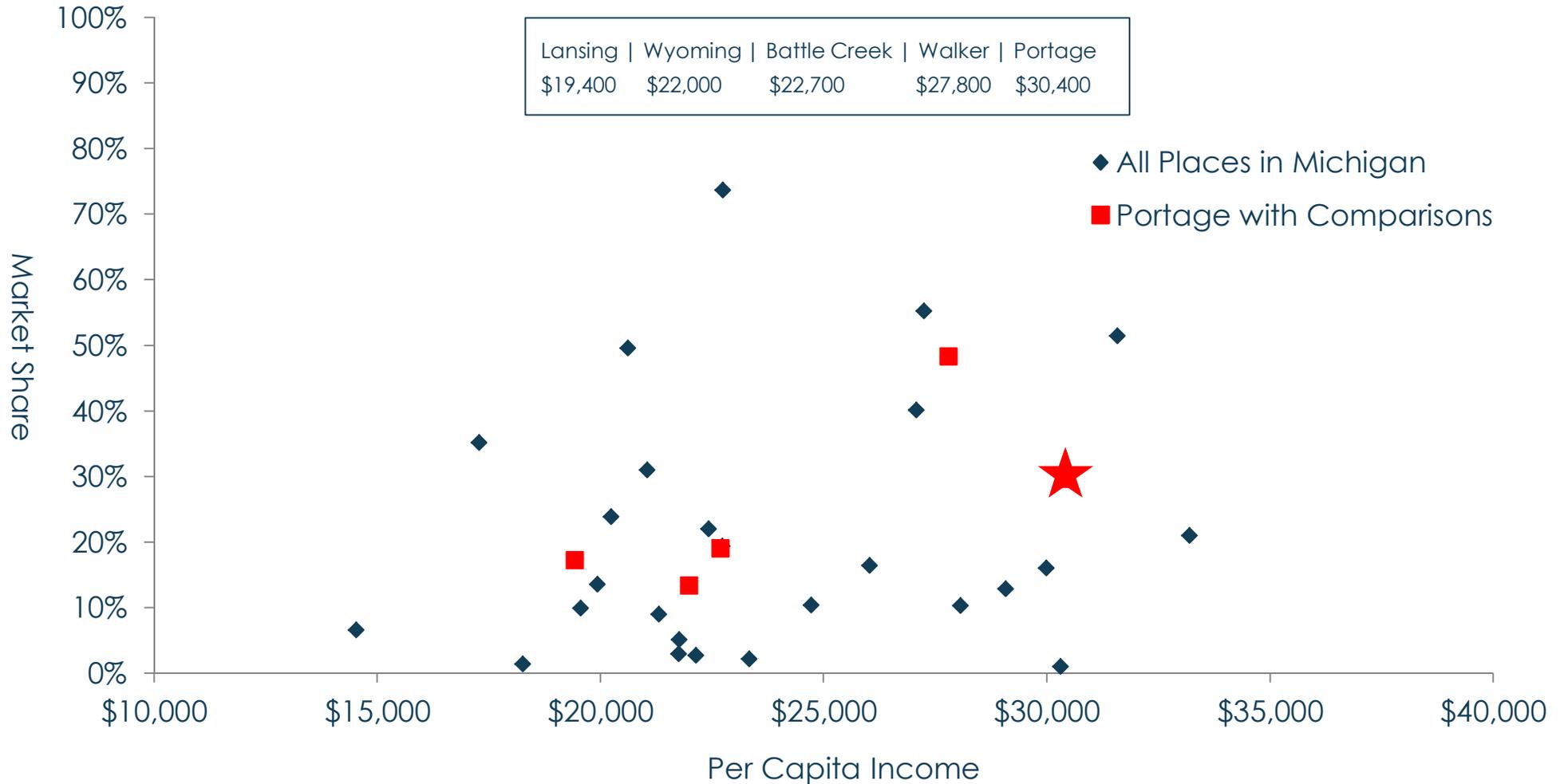
Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage, Michigan; March 2020.
 Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.
 Underlying data from the 2012 and 2017 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income Sporting Goods, Hobby, and Book Stores | NAICS 451 Selected Places in the State of Michigan



Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage, Michigan; March 2020.
 Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.
 Underlying data from the 2012 and 2017 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income General Merchandise Stores | NAICS 452 Selected Places in the State of Michigan

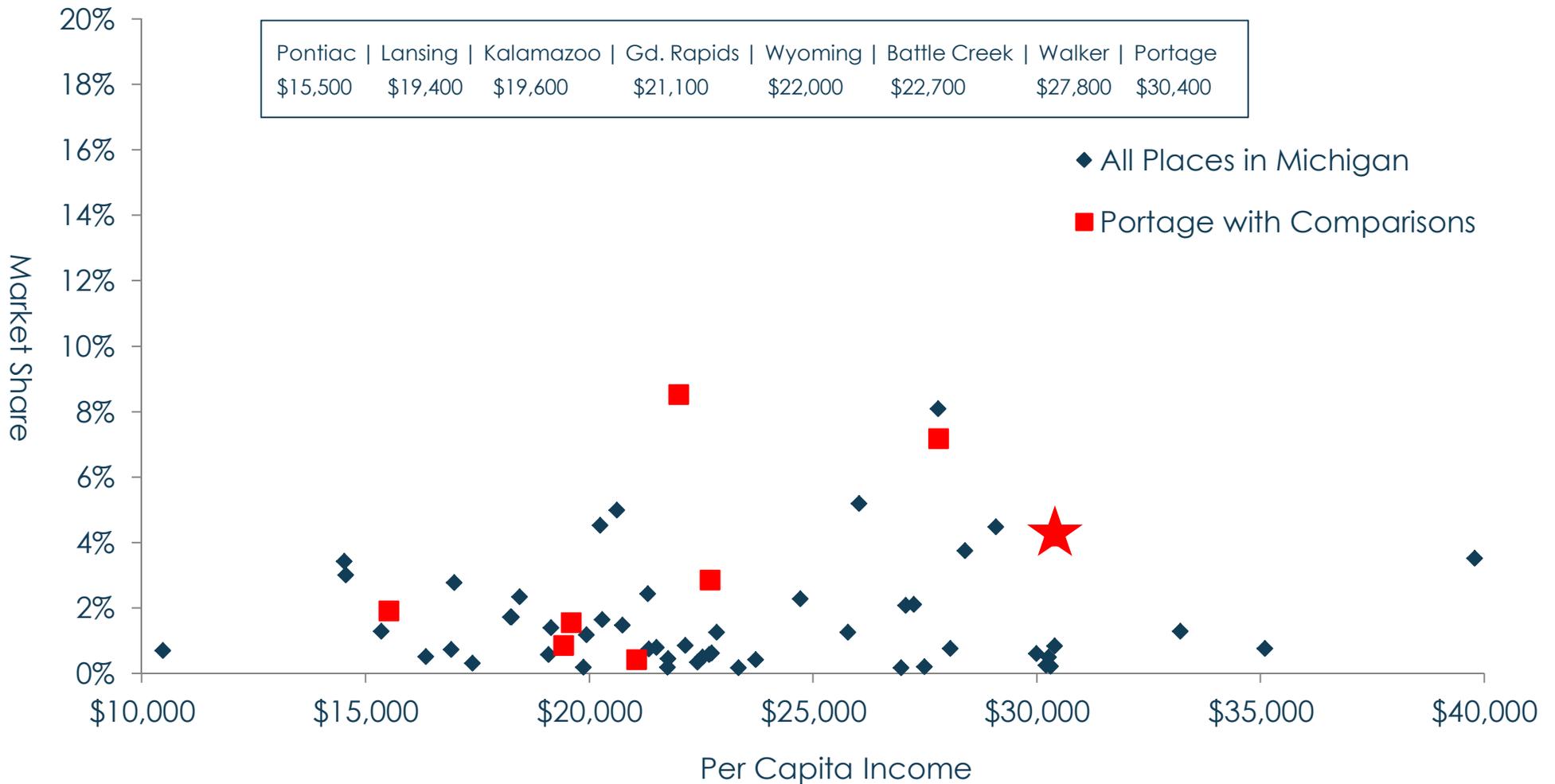


Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage, Michigan; March 2020.
 Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.
 Underlying data from the 2012 and 2017 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income

Electronics, Appliance Stores | NAICS 443

Selected Places (Cities, Villages) in the State of Michigan

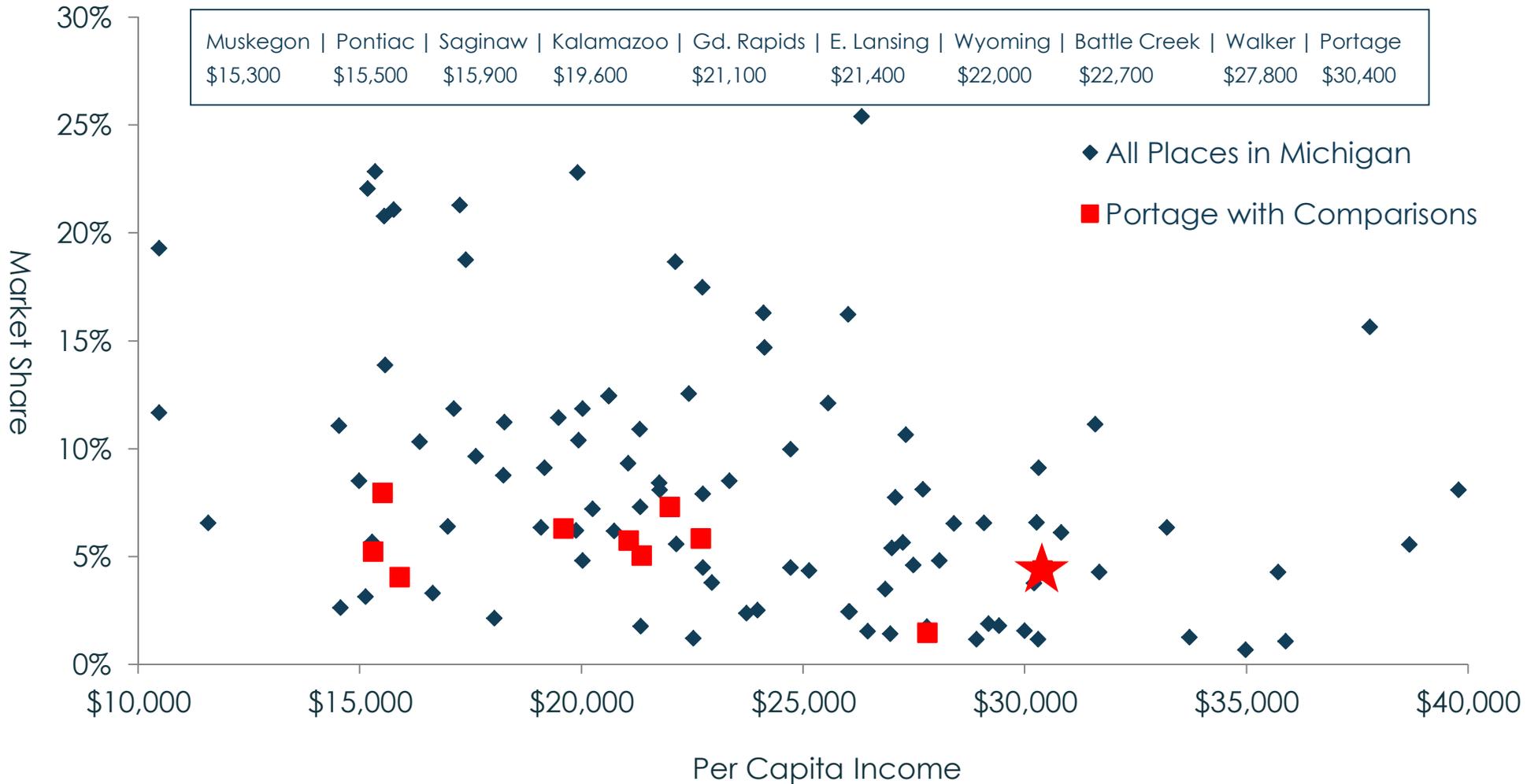


Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage, Michigan; March 2020.
 Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.
 Underlying data from the 2012 and 2017 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income

Food and Beverage Stores | NAICS 445

Selected Places (Cities, Villages) in the State of Michigan



Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage, Michigan; March 2020.
 Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.
 Underlying data from the 2012 and 2017 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income Pharmacies and Drug Stores | NAICS 446 Selected Places in Michigan



Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage, Michigan; March 2020.
 Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.
 Underlying data from the 2012 and 2017 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income

Automotive Parts, Tires, Accessories | NAICS 4413

Selected Places in the State of Michigan

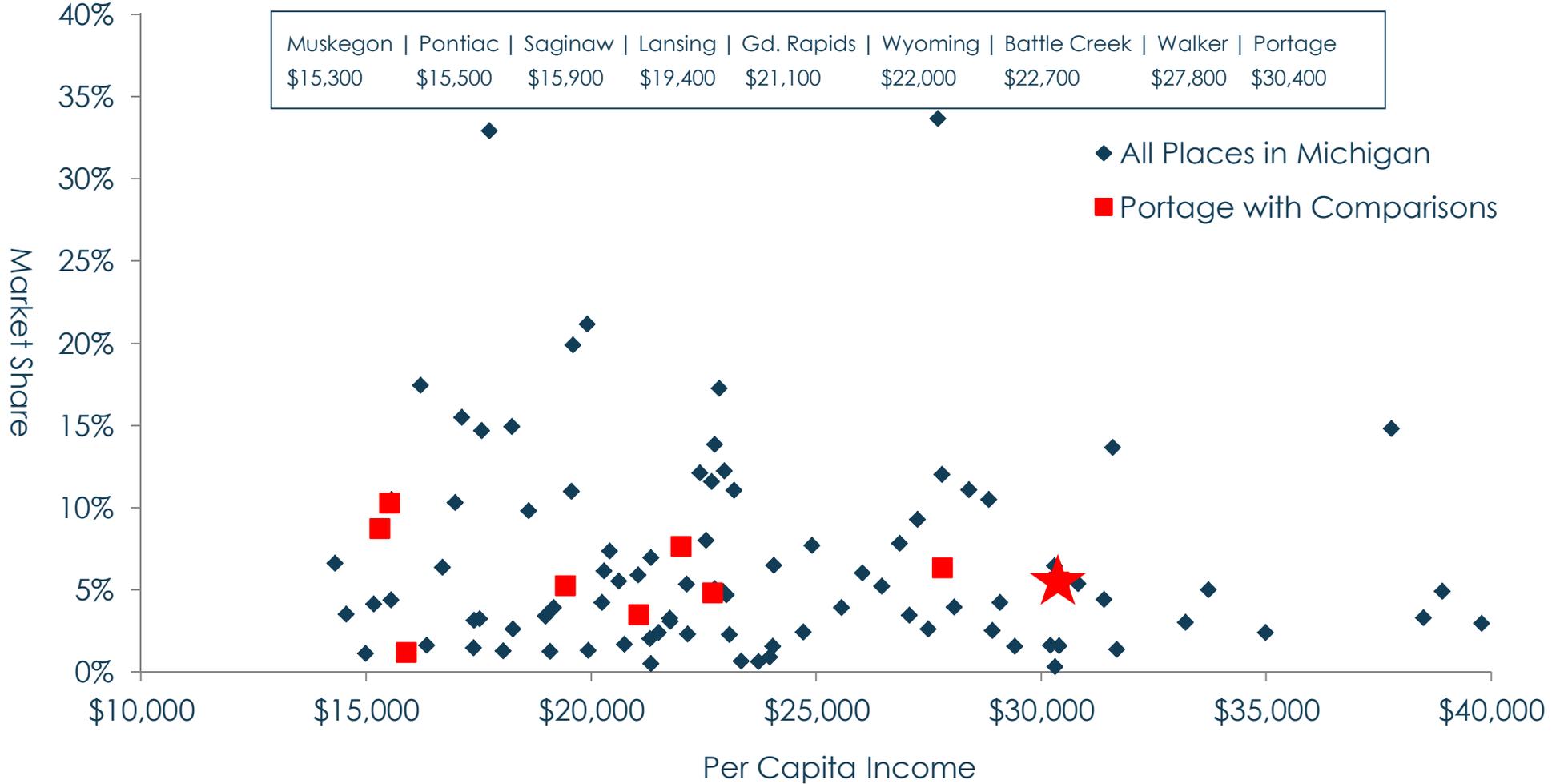


Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage, Michigan; March 2020.
 Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.
 Underlying data from the 2012 and 2017 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income

Building and Garden Materials, Supplies | NAICS 444

Selected Places in the State of Michigan

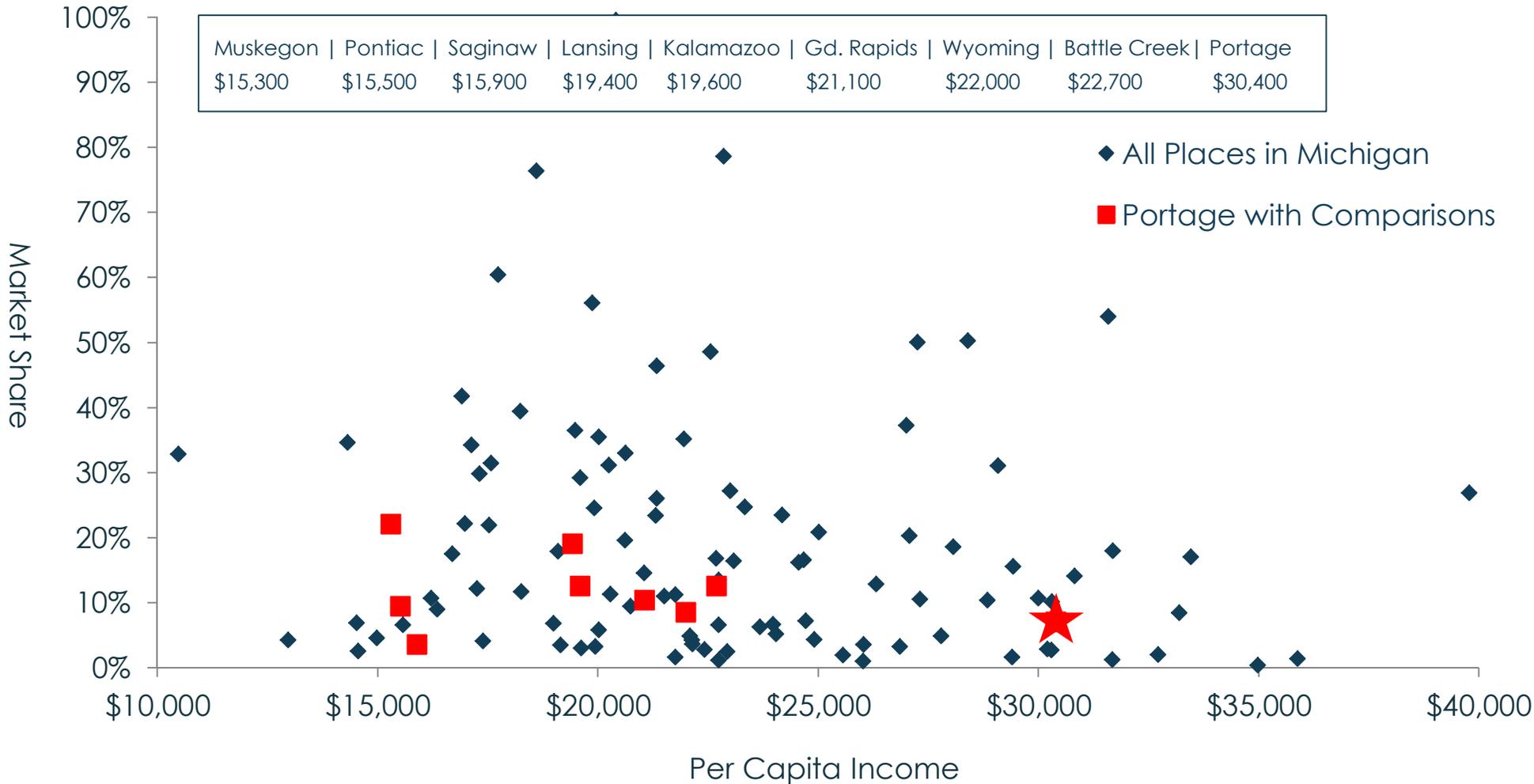


Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage, Michigan; March 2020.
 Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.
 Underlying data from the 2012 and 2017 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income

Motor Vehicle and Parts Dealers | NAICS 441

Selected Places in Michigan



Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage, Michigan; March 2020.
 Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.
 Underlying data from the 2012 and 2017 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Section **C**
Retail Sales per
Establishment

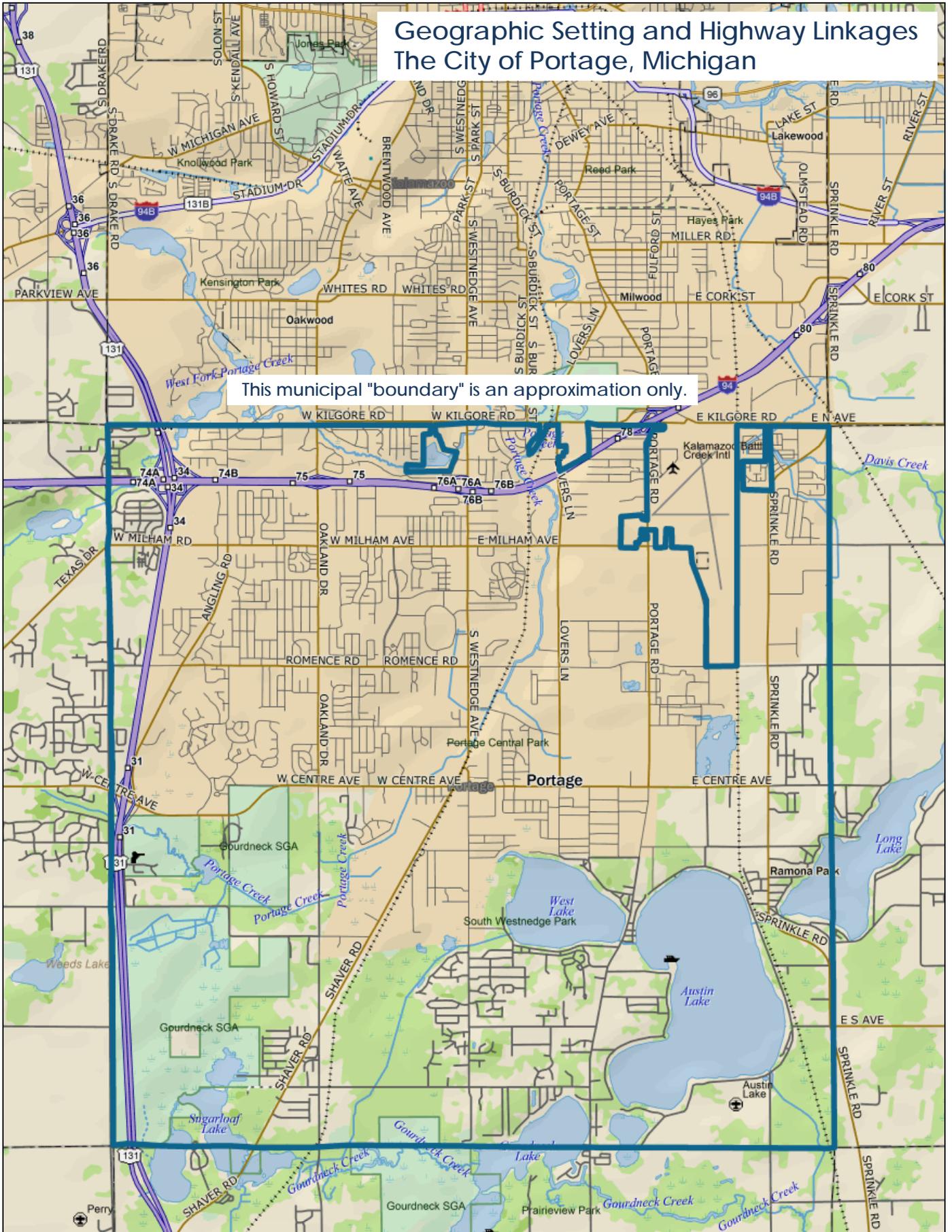


PORTAGE

A Great Place to Play

Geographic Setting and Highway Linkages The City of Portage, Michigan

This municipal "boundary" is an approximation only.



Underlying map provided by Delorme; exhibit prepared by LandUseUSA
Urban Strategies for the City of Portage; March, 2020.



1" = 1,270 ft

Top 40 Highest Performing, Large Retail Establishments The City of Portage, Michigan | Year 2019

Count	Retail Category	Annual Revenues	Total Employees
1	Supercenter, Discount Store	\$135,000,000	600
2	Grocery Store, Supermarket	\$47,500,000	300
3	Home Improvement	\$40,500,000	140
4	Electronics Store	\$35,000,000	150
5	New Car Dealership	\$33,500,000	60
6	New Car Dealership	\$28,000,000	50
7	Home Improvement	\$23,000,000	80
8	Automotive Service, Repair	\$22,500,000	22
9	Grocery Store, Supermarket	\$20,500,000	130
10	Furniture Store	\$14,000,000	80
11	Medical Equipment	\$11,500,000	100
12	Grocery Store, Supermarket	\$10,500,000	65
13	Convenience Store w/Gas	\$10,000,000	10
14	Pharmacy, Drug Store	\$10,000,000	30
15	Team Sports Center	\$9,500,000	70
16	Full Service Restaurant	\$7,500,000	160
17	Home Furnishings Store	\$7,500,000	33
18	Business - Construction	\$7,000,000	25
19	Home Furnishings Store	\$6,500,000	30
20	Sporting Goods Store	\$6,500,000	53
21	Pharmacy, Drug Store	\$6,500,000	20
22	Convenience Store w/Gas	\$6,000,000	6
23	Convenience Store w/Gas	\$6,000,000	6
24	Auto Parts & Supply Store	\$6,000,000	35
25	Other Vehicle Dealer	\$6,000,000	20
26	Restaurant - Italian, Pizza	\$6,000,000	125
27	Nursery, Garden Supply	\$6,000,000	30
28	Sporting Goods Store	\$5,500,000	45
29	Home Furnishings Store	\$5,500,000	25
30	Team Sports Center	\$5,500,000	40
31	Business - Construction	\$5,000,000	30
32	Office Supply Store	\$5,000,000	21
33	Other Vehicle Dealer	\$5,000,000	17
34	Convenience Store w/Gas	\$5,000,000	5
35	Convenience Store w/Gas	\$5,000,000	5
36	Appliance Store	\$5,000,000	20
37	Full Service Restaurant	\$5,000,000	105
38	Family Apparel	\$5,000,000	50
39	Office Supply Store	\$5,000,000	20
40	Pharmacy, Drug Store	\$5,000,000	15

Source: Underlying data provided by ScanUSA with analysis and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage; March 2020.

Large Retail Establishments | Portage

Existing competition along Westnedge Avenue and near the Crossroads Mall in Portage.



HOBBY LOBBY



Michaels
Where Creativity Happens

Harding's
FRIENDLY MARKETS



JOANN



THE HOME DEPOT

HomeGoods

Party City
NOBODY HAS MORE PARTY FOR LESS

meijer

Blair's
FARM & FLEET



Walmart *



Office DEPOT.



TARGET

BARNES & NOBLE
BOOKSELLERS

PET SUPPLIES PLUS

★ *macy's*

T.J. maxx

Medawar
Jewelers

JCPenney

Stein Mart

JARED
The Galleria Of Jewelry

KOHL'S

Burlington

HELZBERG
DIAMONDS.

H&M

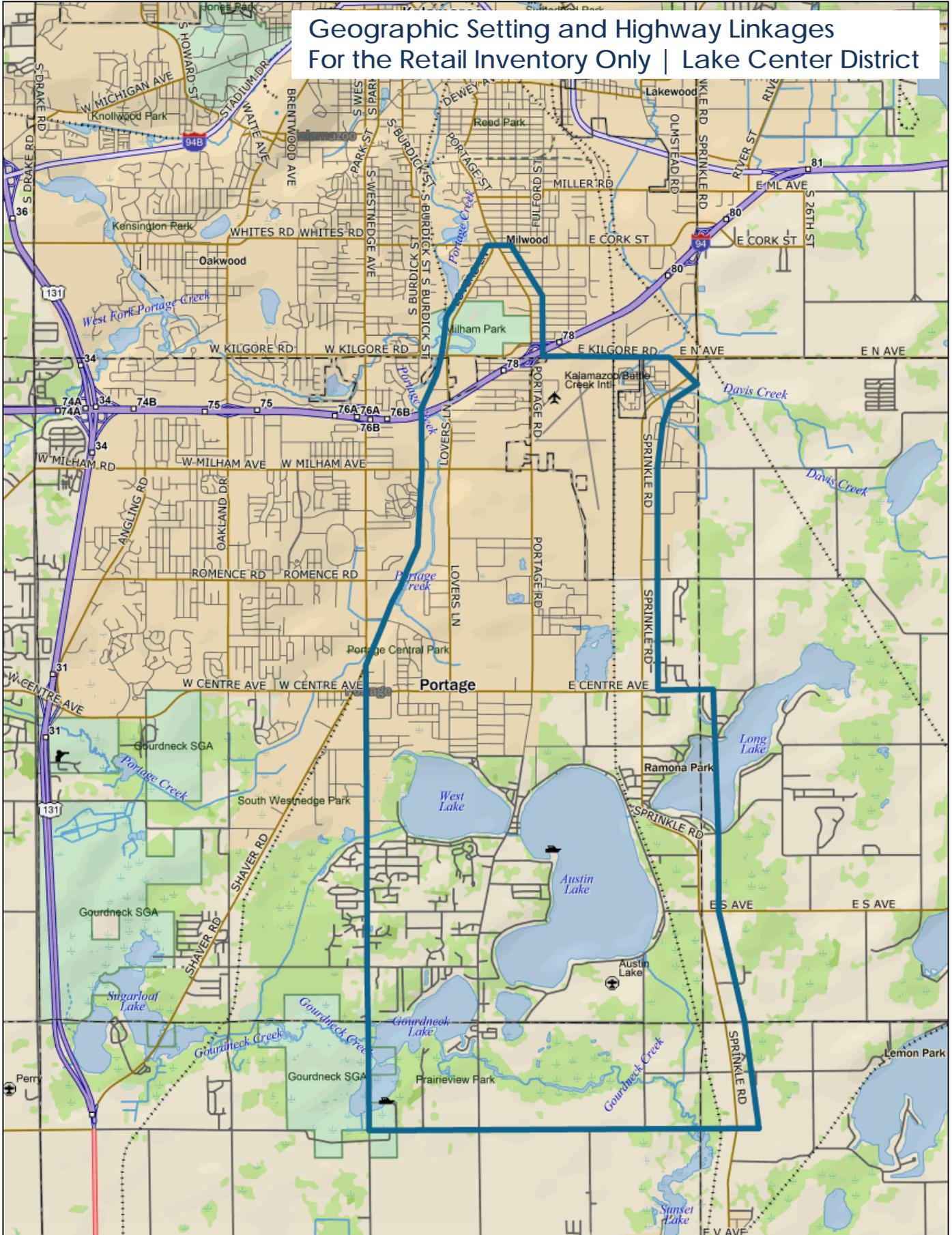


ULTA
BEAUTY

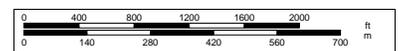
OLD NAVY

BIG!LOTS

Geographic Setting and Highway Linkages For the Retail Inventory Only | Lake Center District



Underlying map provided by Delorme; exhibit prepared by LandUseUSA
Urban Strategies for the City of Portage; March, 2020.



1" = 1,385 ft

Top 40 Highest Performing, Large Retail Establishments Retail Study Area for the Lake Center District | Year 2019

Count	Retail Category	Annual Revenues	Total Employees
1	Automotive Service, Repair	\$22,000,000	22
2	Convenience Store w/Gas	\$10,000,000	10
3	Team Sports Center	\$9,500,000	70
4	Convenience Store w/Gas	\$6,000,000	6
5	Other Vehicle Dealer	\$6,000,000	20
6	Team Sports Center	\$5,500,000	40
7	Business - Construction	\$5,000,000	30
8	Other Vehicle Dealer	\$5,000,000	17
9	Pharmacy, Drug Store	\$5,000,000	15
10	Grocery Store, Supermarket	\$4,500,000	30
11	Pharmacy, Drug Store	\$4,500,000	14
12	Used Car Dealership	\$4,000,000	7
13	Sporting Goods Store	\$4,000,000	30
14	Business - Construction	\$3,500,000	15
15	Marine Dealership, Supply	\$3,500,000	10
16	Liquor Store	\$3,000,000	25
17	Business - Construction	\$3,000,000	10
18	Bar, Tavern, Brew Pub	\$3,000,000	60
19	Restaurant - Italian, Pizza	\$3,000,000	60
20	Catering Services	\$3,000,000	58
21	Auto Parts & Supply Store	\$2,500,000	15
22	Convenience Store w/Gas	\$2,500,000	16
23	Full Service Restaurant	\$2,500,000	50
24	Restaurant - Ethnic Cuisine	\$2,500,000	48
25	Restaurant - Fast Food	\$2,000,000	45
26	Auto Parts & Supply Store	\$2,000,000	12
27	Business - Construction	\$2,000,000	7
28	Boys & Girls Campground	\$2,000,000	12
29	Appliance Store	\$2,000,000	7
30	Electronic Store	\$1,500,000	15
31	Gym, Fitness Center	\$1,500,000	15
32	Full Service Restaurant	\$1,500,000	35
33	Bar, Tavern, Brew Pub	\$1,500,000	40
34	Home Improvement Store	\$1,500,000	6
35	Business - Construction	\$1,000,000	4
36	Used Car Dealership	\$1,000,000	2
37	Convenience Store	\$1,100,000	7
38	Hobby Store - Sports	\$1,000,000	8
39	Full Service Restaurant	\$1,000,000	20
40	Restaurant - Ethnic Cuisine	\$1,000,000	20

Source: Underlying data provided by ScanUSA with analysis and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage; March 2020.

Section D

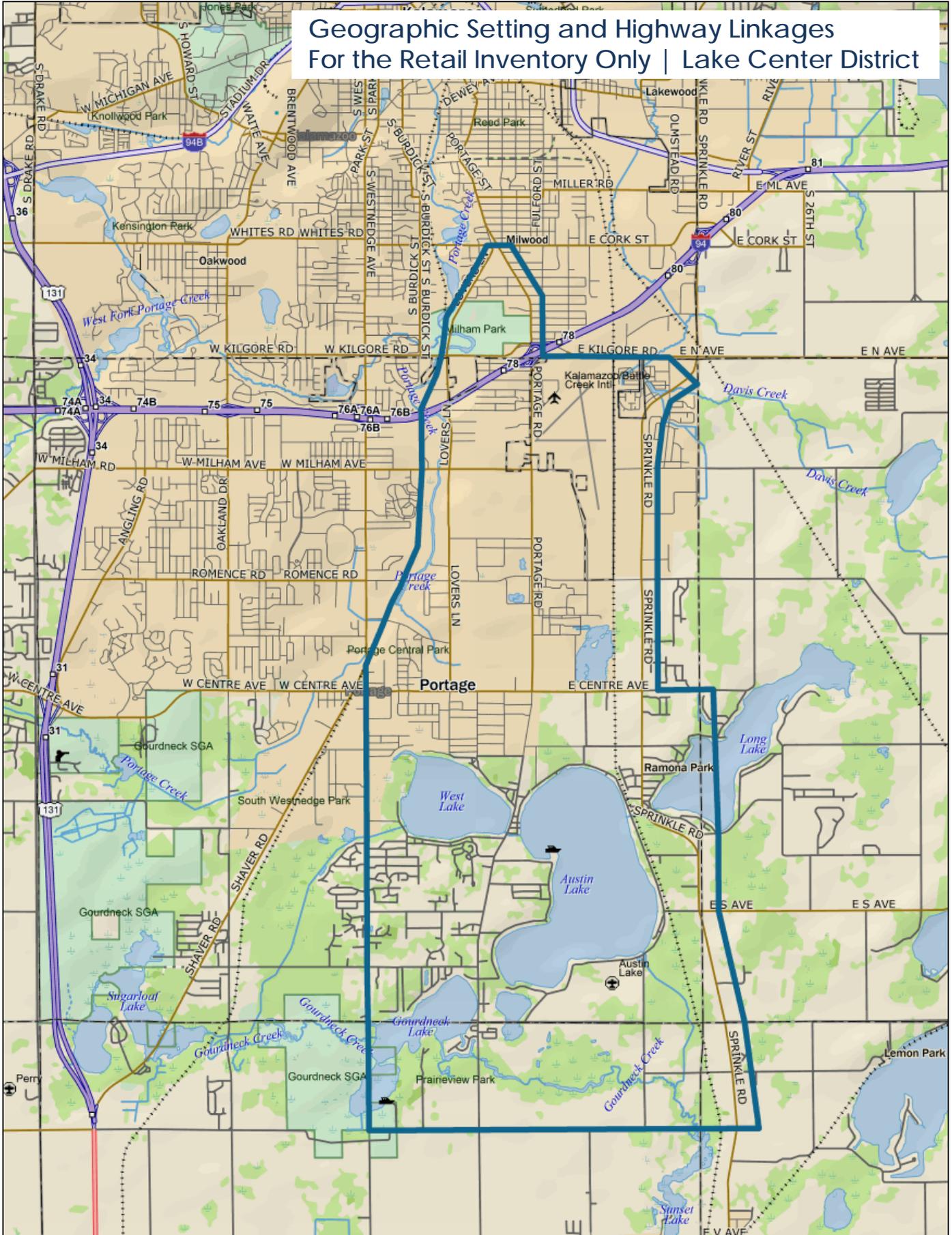
Retail Inventory by Subcategory



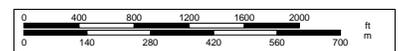
PORTAGE

A Great Place to Play

Geographic Setting and Highway Linkages For the Retail Inventory Only | Lake Center District



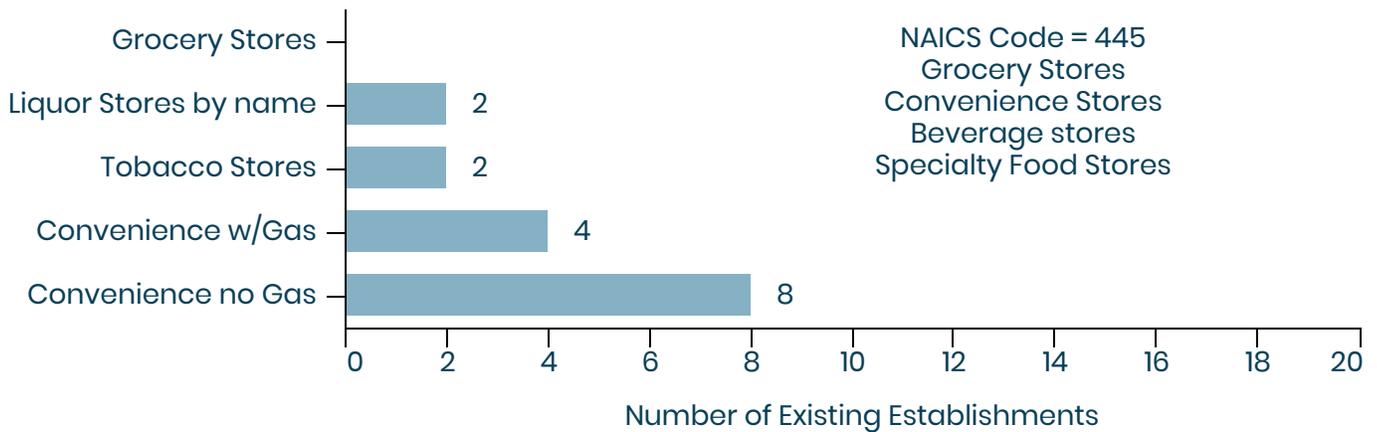
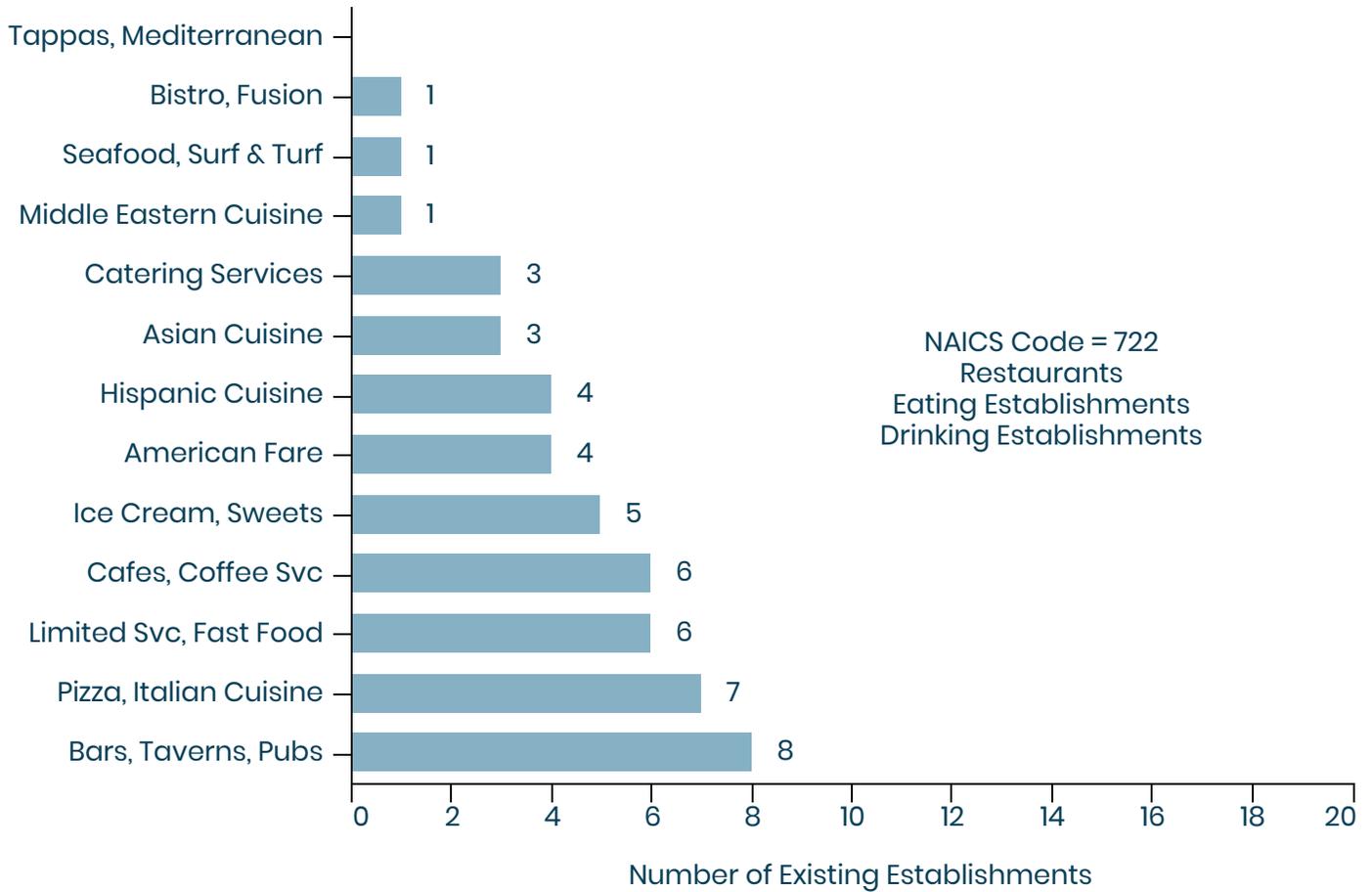
Underlying map provided by Delorme; exhibit prepared by LandUseUSA
Urban Strategies for the City of Portage; March, 2020.



1" = 1,385 ft

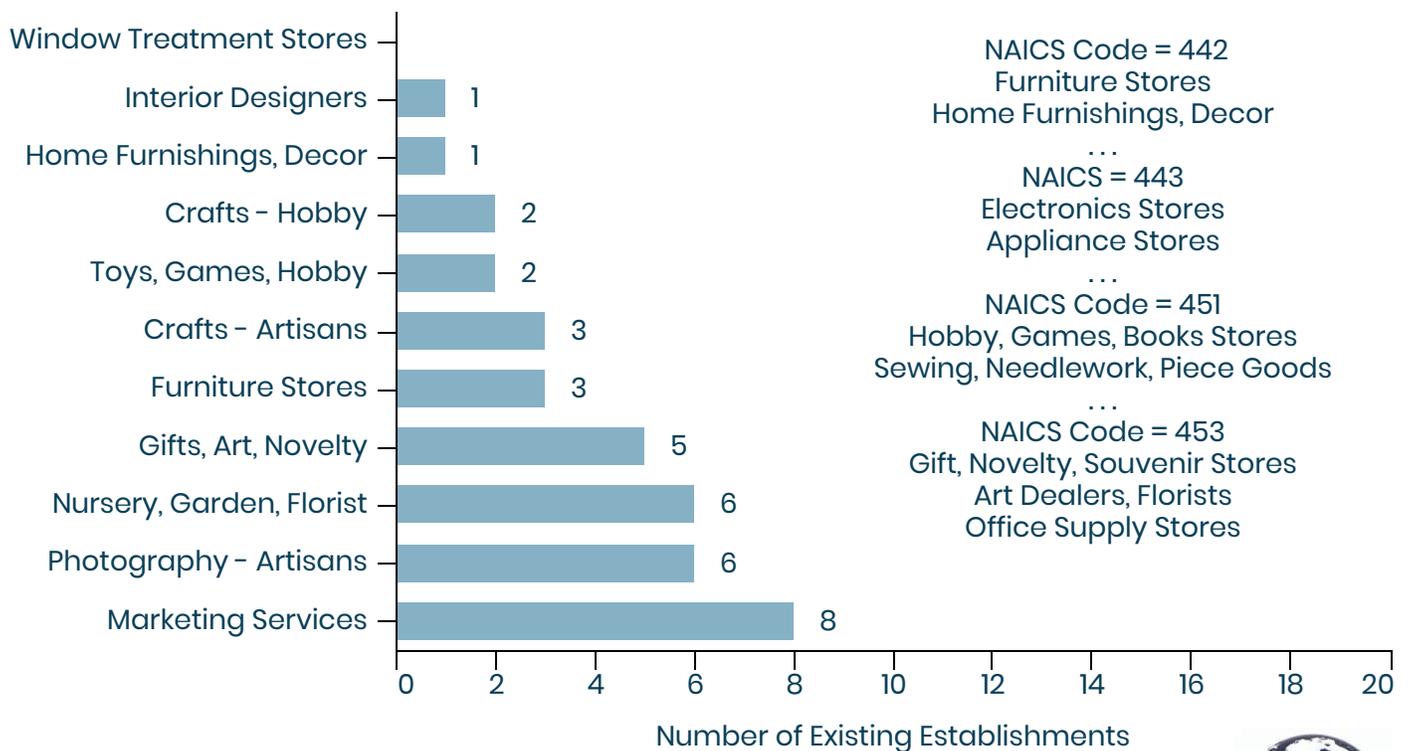
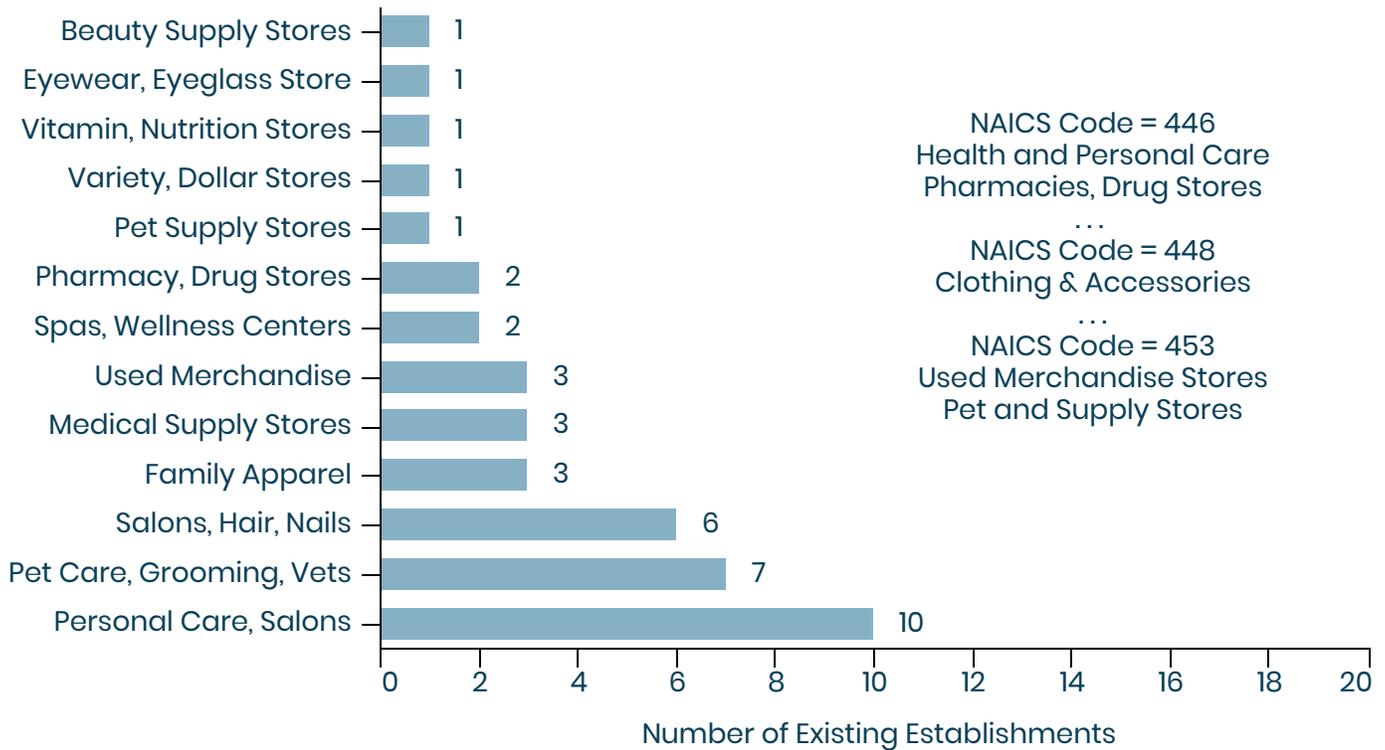
Retail Inventory | Lake Center District

Existing retail choices along Lover's Lane, Centre Avenue, Portage Road, and Sprinkle Road.



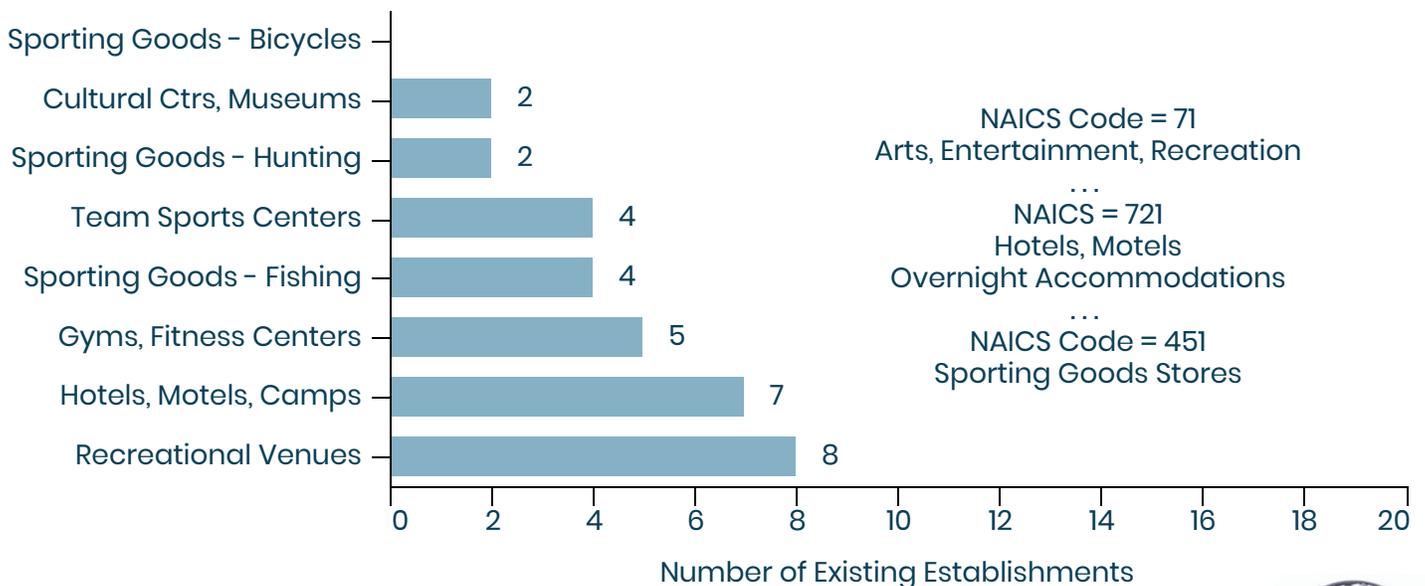
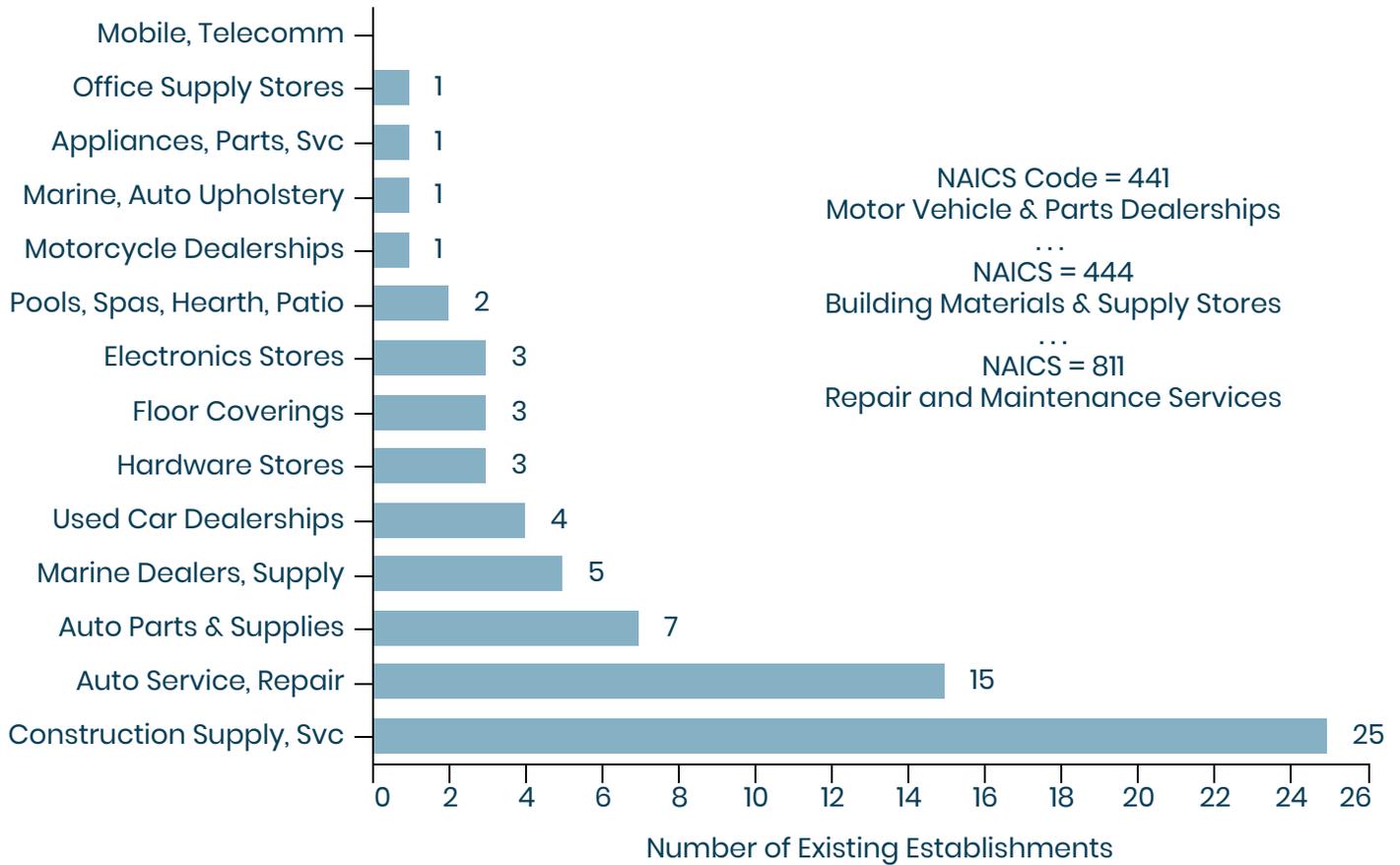
Retail Inventory | Lake Center District

Existing retail choices along Lover's Lane, Centre Avenue, Portage Road, and Sprinkle Road.



Retail Inventory | Lake Center District

Existing retail choices along Lover's Lane, Centre Avenue, Portage Road, and Sprinkle Road.



Catering, Cafes, Coffee, Pubs, Unique Cuisine | March 2020
Retail Study Area | The Lake Center District

Count	Business Name	General Category	Main Corridor	Direction from Lake Ctr District
1	Bucky's Catering	Catering Services	Portage Rd	Center
2	catering by daane's	Catering Services	Portage Rd	Center
3	chicken coop inc	Catering Services	Centre Ave	West
1	Biggby Coffee	Café, Coffee, Tea	Portage Rd	Center
2	biggby coffee	Café, Coffee, Tea	Portage Rd	Center
3	bucky's cafe	Café, Coffee, Tea	Portage Rd	Center
4	cafe meli	Café, Coffee, Tea	Portage Rd	North
5	daily grind cafe	Café, Coffee, Tea	Portage Rd	Center
6	Summer Thyme Café	Café, Coffee, Tea	Portage Rd	North
1	Latitude 42 Brewing Co	Bar, Tavern, Brew Pub	Portage Rd	Center
2	long lake tavern	Bar, Tavern, Brew Pub	Sprinkle Rd	Center
3	One Well Brewing	Bar, Tavern, Brew Pub	Portage Rd	North
4	Presidential Brewing Co	Bar, Tavern, Brew Pub	Portage Rd	Center
5	rj's sports bar & grill	Bar, Tavern, Brew Pub	Portage Rd	Center
6	Tap Room @ Airway Fun Ctr	Bar, Tavern, Brew Pub	Portage Rd	North
7	Traveler's Café and Pub	Bar, Tavern, Brew Pub	Portage Rd	North
8	VFW - the bar	Bar, Tavern, Brew Pub	Sprinkle Rd	Center
1	Bab El Salam	Restaur - Middle Eastern	Centre Ave	West
1	Lo Do Co Fushion	Restaur - Bistro, Fusion	Centre Ave	West
1	Cove Lakeside Bistro, Seafood	Restaur - Seafood	Portage Rd	Center

Source: Field and internet research by LandUseUSA | Urban Strategies for the City of Portage; March 2020 and prior to COVID-19. Subject to refinement based on stakeholder input. List is not intended to be all-inclusive and imperfections are unlikely to alter the conclusions.

Restaurants, Eating Establishments | March 2020
Retail Study Area | The Lake Center District

Count	Business Name	General Category	Main Corridor	Direction from Lake Ctr District
1	Great Wall Express	Restaurant - Asian	Sprinkle Rd	North
2	Joy Fong Restaurant	Restaurant - Asian	Portage Rd	Center
3	ziki japanese sushi-steak hse	Restaurant - Asian	Centre Ave	West
1	la finca mexican rest	Restaurant - Hispanic	Portage Rd	Center
2	taco bell	Restaurant - Hispanic	Portage Rd	North
3	taco bob's	Restaurant - Hispanic	Sprinkle Rd	Center
4	taco bob's	Restaurant - Hispanic	Portage Rd	North
1	Angelo's Italian Eatery	Restaur - Italian, Pizza	Portage Rd	North
2	chicago style pizza	Restaur - Italian, Pizza	Portage Rd	Center
3	cottage inn pizza	Restaur - Italian, Pizza	Sprinkle Rd	North
4	Erbelli's Gourmet Pizzeria	Restaur - Italian, Pizza	Portage Rd	Center
5	franco's sub-sta & italian	Restaur - Italian, Pizza	Centre Ave	West
6	jaspare's pizza portage	Restaur - Italian, Pizza	Sprinkle Rd	North
7	Pizza King of Portage	Restaur - Italian, Pizza	Portage Rd	North
1	Brewsters Junction	Full Service Restaurants	Portage Rd	North
2	Lindbergh's Landing	Full Service Restaurants	Portage Rd	North
3	Yogi's Family Restaurant	Full Service Restaurants	Portage Rd	South
4	Uncle Ernie's Pancake House	Full Service Restaurants	Portage Rd	North
1	mc donald's	Restaurants - Fast Food	Portage Rd	Center
2	McDonald's	Restaurants - Fast Food	Portage Rd	North
3	subway	Restaurants - Fast Food	Centre Ave	West
4	subway	Restaurants - Fast Food	Portage Rd	North
5	jersey giant subs	Restaurants - Fast Food	Sprinkle Rd	North
6	Youz Guys Sausage Deli	Restaurants - Limited Svc	Portage Rd	Center

Source: Field and internet research by LandUseUSA | Urban Strategies for the City of Portage; March 2020 and prior to COVID-19. Subject to refinement based on stakeholder input. List is not intended to be all-inclusive and imperfections are unlikely to alter the conclusions.

Grocery, Convenience, Liquor, Specialty | March 2020
Retail Study Area | The Lake Center District

Count	Business Name	General Category	Main Corridor	Direction from Lake Ctr District
1	H & B Market	Convenience Store	Portage Rd	Center
2	Lakeshore Market of Kazoo	Convenience Store	Sprinkle Rd	Center
3	circle k	Convenience Store	Portage Rd	North
4	Johnny's Markets	Convenience Store	Portage Rd	North
5	on the wings	Convenience Store	Portage Rd	North
6	Twelve Baskets Food Pantry	Convenience Store	Portage Rd	Center
7	Sweet Convenience Foods	Convenience Store	Centre Ave	West
8	Gourdneck Lake Market	Convenience Store	Portage Rd	South
1	shell food mart	Convenience w/Gas	Portage Rd	North
2	speedway	Convenience w/Gas	Portage Rd	North
3	speedway	Convenience w/Gas	Portage Rd	Center
4	sprinkle citgo	Convenience w/Gas	Sprinkle Rd	North
1	daane's wine & liquor	Liquor Store by name	Portage Rd	Center
2	sprinkle beer mart	Liquor Store by name	Sprinkle Rd	Center
1	Green Earth Hydroponic	Tobacco Stores	Portage Rd	Center
2	Pure Tobacco Supplies	Tobacco Stores	Portage Rd	Center
1	dairy queen	Specialty - Sweets	Centre Ave	West
2	Bakewell Company	Specialty - Sweets	Portage Rd	North
3	Keto Kravings Bakeshop	Specialty - Sweets	Oakside St	Center
4	taste of heaven	Specialty - Sweets	Portage Rd	North
5	y'opa frozen yogurt	Specialty - Sweets	Centre Ave	West

Source: Field and internet research by LandUseUSA | Urban Strategies for the City of Portage; March 2020 and prior to COVID-19. Subject to refinement based on stakeholder input. List is not intended to be all-inclusive and imperfections are unlikely to alter the conclusions.

Pharmacies, Apparel, Personal Care | March 2020
Retail Study Area | The Lake Center District

Count	Business Name	General Category	Main Corridor	Direction from Lake Ctr District
1	Portage Cleaners, Laundry	Laundry, Tailoring Svc	Portage Rd	Center
1	5092 supplements inc	Vitamins, Supplements	Sprinkle Rd	North
1	Progressive Eyecare Centre	Eyewear, Eyeglass Store	Centre Road	West
1	CosmoProf	Beauty Supply Store	Portage Rd	North
1	portage pharmacy	Pharmacy, Drug Store	Centre Ave	Center
2	westlake drug	Pharmacy, Drug Store	Portage Rd	Center
1	beltone audiology hearing	Medical Supplies	Lovers Lane	North
2	Perspective Enterprises	Medical Supplies	Sprinkle Rd	Center
3	Center Medical Supply Co	Medical Supplies	Sprinkle Rd	North
1	Vallar Nail Salon	Personal Care - nails	Centre Ave	West
2	Shear Reflections Salon	Personal Care - hair	Portage Rd	Center
3	Abstract Salon & Spa	Personal Care - hair	Portage Rd	Center
4	M&T Hair Design	Personal Care - hair	Portage Rd	Center
5	Hairmania	Personal Care - hair	Lovers Ln	North
6	Alano Salon	Personal Care - hair	Lovers Ln	Center
1	Centre Spa & Wellness	Personal Care - wellness	Centre Ave	Center
2	Lake Effect Health Consult	Personal Care - wellness	Portage Rd	Center
1	Cato Co	Apparel - Women's	Lovers Ln	North
2	Back of the Net Sports	Apparel - Uniforms	Sprinkle Rd	North
3	Aramark Uniform Services	Apparel - Uniforms	Sprinkle Rd	North

Source: Field and internet research by LandUseUSA | Urban Strategies for the City of Portage; March 2020 and prior to COVID-19. Subject to refinement based on stakeholder input. List is not intended to be all-inclusive and imperfections are unlikely to alter the conclusions.

Automotive Dealers, Parts | March 2020
Retail Study Area | The Lake Center District

Count	Business Name	General Category	Main Corridor	Direction from Lake Ctr District
1	deals unlimited inc	Used Car Dealerships	Portage Rd	Center
2	gentry auto sales	Used Car Dealerships	Sprinkle Rd	Center
3	brenda gentry	Used Car Dealerships	Centre Ave	West
4	BDA Spanish	Used Car Dealerships	Portage Rd	North
1	perry harley davidson cmty	Motorcycle Dealers	Sprinkle Rd	North
1	Bandit Upholstery Shop	Marine, Auto Repair Svc	Lovers Ln	North
1	The Edge Honda Marine	Marine Dealers, Supply	Portage Rd	Center
2	Boat City Marine	Marine Dealers, Supply	Portage Rd	Center
3	Docks Unlimited	Marine Dealers, Supply	Portage Rd	Center
4	Lifts, Ladders, Docks	Marine Dealers, Supply	Shaver Rd	South
5	Nelson Hardware's docks	Marine Dealers, Supply	Portage Rd	Center
1	action motorcycle parts	Auto Parts & Supplies	Lovers Ln	North
2	auto value	Auto Parts & Supplies	Portage Rd	North
3	mullins auto svc	Auto Parts & Supplies	Sprinkle Rd	Center
4	Napa Auto Parts, Ridge	Auto Parts & Supplies	Centre Ave	West
5	Napa Auto Parts	Auto Parts & Supplies	Vicksburg	South
6	R & N Buggy & Truck	Auto Parts & Supplies	Sprinkle Rd	Center
7	best fire inc	Auto Parts & Supplies	Sprinkle Rd	Center

Source: Field and internet research by LandUseUSA | Urban Strategies for the City of Portage; March 2020 and prior to COVID-19. Subject to refinement based on stakeholder input. List is not intended to be all-inclusive and imperfections are unlikely to alter the conclusions.

Automotive Service and Repair | March 2020
Retail Study Area | The Lake Center District

Count	Business Name	General Category	Main Corridor	Direction from Lake Ctr District
1	Allcraft Of Michigan	Auto Service, Repair	Lovers Ln	North
2	B & S Auto	Auto Service, Repair	Portage Rd	South
3	Best Tire Inc	Auto Service, Repair	Sprinkle Rd	Center
4	bullseye windshield repair	Auto Service, Repair	Portage Rd	North
5	CARSTAR Portage	Auto Service, Repair	Lovers Ln	North
6	crossroads auto svc	Auto Service, Repair	Lovers Ln	North
7	D & A Auto Body	Auto Service, Repair	Sprinkle Rd	Center
8	Dave's Details Inc	Auto Service, Repair	Portage Rd	Center
9	Graham's Towing, Recovery	Auto Service, Repair	Lovers Ln	North
10	Keystone Auto Repair Inc	Auto Service, Repair	Portage Rd	Center
11	Mullin's Auto Service, Inc.	Auto Service, Repair	Sprinkle Rd	Center
12	Noggle Auto Repair LLC	Auto Service, Repair	Lovers Ln	North
13	postula's auto glass ctr	Auto Service, Repair	Portage Rd	Center
14	Precision Glass & Glazing	Auto Service, Repair	Sprinkle Rd	North
15	RPM Oil & Lube Center	Auto Service, Repair	Portage Rd	Center

Source: Field and internet research by LandUseUSA | Urban Strategies for the City of Portage; March 2020 and prior to COVID-19. Subject to refinement based on stakeholder input. List is not intended to be all-inclusive and imperfections are unlikely to alter the conclusions.

Furniture, Electronics, Nurseries | March 2020
Retail Study Area | The Lake Center District

Count	Business Name	General Category	Main Corridor	Direction from Lake Ctr District
1	Halls Closets & More	Interior Designers	Portage Rd	Center
1	lighting & decor by j s m	Home Furnishings	Sprinkle Rd	North
1	liberty square furniture	Furniture Stores - Amish	Portage Rd	Center
2	seat n sleep	Furniture Stores	Sprinkle Rd	Center
3	KalamazooKitty.com	Furniture Stores - Used	Portage Rd	North
1	omega computer svc	Electronics	Lovers Ln	North
2	portage typewriter sales	Electronics	Portage Rd	Center
3	roe-comm two-way radios	Electronics	Lovers Ln	North
1	Kiester Appliance Repair Svc	Appliances	Portage Rd	Center
1	Corstange Greenhouses	Nursery, Garden, Florist	Centre Ave	Center
2	Earth-Works Lawn, Landscape	Nursery, Garden, Florist	Portage Rd	Center
3	Garden Spot Greenhouse	Nursery, Garden, Florist	Lovers Ln	North
4	Key Blooms, Inc. Wholesale	Nursery, Garden, Florist	Sprinkle Rd	South
5	poldermans flower shop	Nursery, Garden, Florist	Portage Rd	Center
6	Three Brothers' Tree Farm	Nursery, Garden, Florist	S Ave East	East
1	Modern Flooring America	Floor Coverings	Lovers Ln	North
2	Floor Coverings International	Floor Coverings	Sprinkle Rd	North
3	Erickson's Flooring, Supply	Floor Coverings	Sprinkle Rd	North
1	Nelson Hardware	Hardware Stores	Portage Rd	Center
2	Right-Way Rental	Hardware Stores	Portage Rd	Center
3	Outdoor Power Equipment	Hardware Stores	Portage Rd	Center
1	Michigan Swim Pools & Spas	Pools, Spas, Hearth, Patio	Portage Rd	North
2	roodbergen pools & spas	Pools, Spas, Hearth, Patio	Portage Rd	North

Source: Field and internet research by LandUseUSA | Urban Strategies for the City of Portage; March 2020 and prior to COVID-19. Subject to refinement based on stakeholder input. List is not intended to be all-inclusive and imperfections are unlikely to alter the conclusions.

Home Improvement, Construction Services | March 2020
Retail Study Area | The Lake Center District

Count	Business Name	General Category	Main Corridor	Direction from Lake Ctr District
1	Aqua Plumbing Services	Construction Supply, Svc	Osterhout Ave	South
2	Austin Construction Co	Construction Supply, Svc	Portage Rd	Center
3	Condo Barns Interior Electronic	Construction Supply, Svc	Portage Rd	Center
4	Dan Wood Co - Heating	Construction Supply, Svc	Sprinkle Rd	North
5	Depatie Fluid Power Hardware	Construction Supply, Svc	Sprinkle Rd	North
6	Diversified Service - Roofing	Construction Supply, Svc	Coxs Dr	East
7	Drain Monkeys - Plumbers	Construction Supply, Svc	Portage Rd	Center
8	fawley overhead door inc	Construction Supply, Svc	Lovers Ln	North
9	Fox Brothers Co. Doors & Roofs	Construction Supply, Svc	Sprinkle Rd	North
10	Hansons Door Supplier	Construction Supply, Svc	Portage Rd	Center
11	Home Acres Building Supply	Construction Supply, Svc	Sprinkle Rd	North
12	Howe Roofing Handyman Svc	Construction Supply, Svc	Portage Rd	Center
13	Ingersoll Watson Mc Surveyors	Construction Supply, Svc	Lovers Ln	North
14	J & T Plastering & Stucco LLC	Construction Supply, Svc	Portage Rd	Center
15	Jergens Piping North Fab Shop	Construction Supply, Svc	Portage Rd	Center
16	Kasten Insulation Services	Construction Supply, Svc	Coxs Dr	East
17	MI Construction & Remodeling	Construction Supply, Svc	Portage Rd	Center
18	nxtwall usa llc	Construction Supply, Svc	Sprinkle Rd	North
19	Pella Windows & Doors	Construction Supply, Svc	Lovers Ln	North
20	quality air filtration svc	Construction Supply, Svc	Sprinkle Rd	North
21	wagner door co	Construction Supply, Svc	Portage Rd	Center
22	granite counter tops	Construction Supply, Svc	Portage Rd	Center
23	Rollie Williams Paint Spot	Construction Supply, Svc	Portage Rd	Center
24	solid rock foundation repair	Construction Supply, Svc		
25	Tyler Home Improvements	Construction Supply, Svc	Coxs Dr	East

Source: Field and internet research by LandUseUSA | Urban Strategies for the City of Portage; March 2020 and prior to COVID-19. Subject to refinement based on stakeholder input.
List is not intended to be all-inclusive and imperfections are unlikely to alter the conclusions.

General Merchandise, Sporting Goods, Pets | March 2020
Retail Study Area | The Lake Center District

Count	Business Name	General Category	Main Corridor	Direction from Lake Ctr District
1	Dollar General	Variety, Dollar Stores	Sprinkle Rd	North
1	Salvation Army Thrift Store	Used Merchandise	Portage Rd	North
3	Thrift Center Bibles for Missions	Used Merchandise	Portage Rd	North
1	FedEx Shipping Center	Office Supplies	Sprinkle Rd	North
1	andy & damon sales	Sporting Goods - Hunting	Portage Rd	North
2	tactical advantage	Sporting Goods - Hunting	Portage Rd	Center
1	Double L Bait & Tackle	Sporting Goods - Fishing	Sprinkle Rd	South
2	RWR Bait & Tackle	Sporting Goods - Fishing	Portage Rd	Center
3	rwr bait & tackle	Sporting Goods - Fishing		
4	stankx bait co	Sporting Goods - Fishing	Pleasant Dr	Center
1	Paver Pet Supply	Pets - Supplies	Portage Rd	Center
1	Dogs by Design	Pets - care	Portage Rd	Center
2	Greathouse Darrell DVM Vet	Pets - care	Portage Rd	Center
3	Kalamazoo Humane Society	Pets - care	East U Ave	South
4	Lakeview Animal Hospital	Pets - care	Portage Rd	Center
5	Ruff Cuts Grooming Salon	Pets - care	Portage Rd	Center
6	VCA Animal Hospital	Pets - care	Portage Rd	Center
7	Wiggles, Waggles & Tails	Pets - boarding	Portage Rd	Center
8	Michigander Retrievers	Pets - boarding	East S Ave	East

Source: Field and internet research by LandUseUSA | Urban Strategies for the City of Portage; March 2020 and prior to COVID-19. Subject to refinement based on stakeholder input. List is not intended to be all-inclusive and imperfections are unlikely to alter the conclusions.

Hobby, Crafts, Arts, Marketing Services | March 2020
Retail Study Area | The Lake Center District

Count	Business Name	General Category	Main Corridor	Direction from Lake Ctr District
1	Field's Fabrics	Hobby - Crafts	Portage Rd	North
2	jest paint llc	Hobby - Crafts	Lovers Ln	North
1	hobby-sports.com	Toys/Games - General	Portage Rd	Center
2	Rocket Comics	Toys/Games - Comics	Portage Rd	North
1	PJ's Frame-Up	Gifts, Art, Novelty	Vicksburg	South
2	Laurie's Hodgepodgery Crafts	Gifts, Art, Novelty	Bacon Ave	Center
3	twelve baskets	Gifts, Art, Novelty	Portage Rd	South
4	Westlake Giftshop	Gifts, Art, Novelty	Portage Rd	Center
5	Crown Trophy	Gifts, Art, Novelty	Lovers Ln	North
1	Gary Lewis Painting	Artisans - Paintings	Osterhout Ave	Center
2	Clo-Cliffwood	Artisans - Woodworking	Osterhout Ave	Center
3	Forbes Piano Lessons, tuning	Artisans - Music Lessons	Portage Rd	Center
1	Captured in Time Photography	Artisans - Photography	Osterhout Ave	Center
2	Kzoo Studios	Artisans - Photography	Coxs Dr	Center
3	Natalia Mae Photography	Artisans - Photography	Centre Ave	West
4	Amanda Yassay Photography	Artisans - Photography	Centre Ave	West
5	Allanlee Photography & Film	Artisans - Photography	Sprinkle Rd	North
6	FTL Photos	Artisans - Photography	Sprinkle Rd	North
1	A 1 Signs	Business - Marketing	Portage Rd	North
2	Bart's Banners & Signs	Business - Marketing	Portage Rd	South
3	Creative Marketing Group	Business - Marketing	Lovers Ln	North
4	Howard Printing	Business - Marketing	Sprinkle Rd	North
5	ImageStream	Business - Marketing	Portage Rd	North
6	Park Productions	Business - Marketing	Osterhout Ave	Center
7	Printing Services	Business - Marketing	Sprinkle Rd	Center
8	west michigan stamp	Business - Marketing	Portage Rd	Center

Source: Field and internet research by LandUseUSA | Urban Strategies for the City of Portage; March 2020 and prior to COVID-19. Subject to refinement based on stakeholder input. List is not intended to be all-inclusive and imperfections are unlikely to alter the conclusions.

Hotels, Sports Centers, Family Entertainment | March 2020
Retail Study Area | The Lake Center District

Count	Business Name	General Category	Main Corridor	Direction from Lake Ctr District
1	airport inn	Hotels, Motels	Portage Rd	North
2	Comfort Inn Wings Stadium	Hotels, Motels	Portage Rd	North
3	Country Inn Suites Carlson	Hotels, Motels	Portage Rd	North
4	Days Inn & Suites	Hotels, Motels	Portage Rd	North
5	Hampton Inn Kalamazoo	Hotels, Motels	Portage Rd	North
6	Residence Inn by Marriott	Hotels, Motels	Portage Rd	North
7	latora leg camp	Boys, Girls Campground	Centre Ave	West
1	rockstar auto conference	Event Organizers	Coxs Dr	East
1	military road show, traveling	Cultural Ctrs, Museums	Portage Rd	North
2	Indo American Cultural Ctr	Cultural Ctrs, Museums	Portage Rd	North
1	kalamazoo kingdom soccer	Team Sports Centers	Centre Ave	East
2	soccer zone	Team Sports Centers	Sprinkle Rd	North
3	Ramona Park Sports Complex	Team Sports Centers	Sprinkle Rd	Center
4	Indian Run Golf Club	Team Sports Centers	S Av East	East
5	portage city parks & rec dept	Team Sports Centers	Centre Ave	West
1	Ramona Park Beach	Family Entertainment	Sprinkle Rd	Center
2	Airway Fun Center *	Family Entertainment	Portage Rd	North
3	Air Zoo	Family Entertainment	Portage Rd	North
4	Sky Zone Kalamazoo	Family Entertainment	Sprinkle Rd	North
5	jungle joe's family fun ctr	Family Entertainment	Sprinkle Rd	North
6	great skate roller rink	Family Entertainment	Portage Rd	South
7	Shamrock Boarding Stables	Family Entertainment	S Av East	East
1	anytime fitness	Gyms, Fitness Centers	Centre Ave	West
2	crossfit azo	Gyms, Fitness Centers	Lovers Ln	North
3	Southside DoJo Martial Arts	Gyms, Fitness Centers	Portage Rd	Center
4	Walker's Tae Kwon Do Acad	Gyms, Fitness Centers	Portage Rd	Center
5	Courthouse Athletic Center	Gyms, Fitness Centers	Sprinkle Rd	North
6	Extreme Cop Fitness program	Fitness Programs	Stanley Ave	Center

Examples of Local Retail Closures Since 2010 Retail Study Area for the Lake Center District

Count	Business Name	General Category	Main Corridor	Direction from Lake Ctr District
1	Country Maid Bakery	Specialty - Bakery	Portage Rd	Center
2	El Dorado Country Maid Bakery	Specialty - Bakery	Portage Rd	Center
3	Nickles Cupcakes	Specialty - Bakery	Portage Rd	Center
4	Canary Gift Shop & Pasties	Specialty - Pasties	Portage Rd	Center
1	Beading Bar	Hobby - Crafts	Portage Rd	.
2	Avalon Bookshop	Hobby - Books	Portage Rd	.
3	L & J Hobbies	Hobby - Trains	Portage Rd	Center
4	Train Barn/Hobby Shop, Museum	Hobby - Trains	Sprinkle Rd	Center
5	Crazy Mike's Fireworks	Hobby - Fireworks	Sprinkle Rd	Center
1	oakley's catering	Catering Services	.	.
2	Beacon Club Members Club	Full Service Restaurants	Portage Rd	North
3	Callahans Family Restaurant	Full Service Restaurants	Portage Rd	North
4	kalamazoo bbq & grill	Full Service Restaurants	.	.
5	Kap's Kitchen	Full Service Restaurants	Portage Rd	.
6	west lake drive-in	Full Service Restaurants	Portage Rd	Center
7	El Dorado Country Maid Café	Restaurant - Hispanic	Portage Rd	Center
8	bravo!	Restaur - Italian, Pizza	Portage Rd	North
1	Centre Street Market	Convenience Store	Centre Ave	West
2	Lover's Lane Mart	Convenience Store	Centre Ave	West
3	Brew Time Beverage	Liquor Store	Portage Rd	South
1	sundown enterprises	Appliances	.	.
2	Lake Center Computers	Electronics	Portage Rd	Center
3	trivalent group	Electronics	.	.
1	Early America Ent - Lighting	Home Improve - Lighting	Mandigo Ave	East
2	Powers Total Bath Remodeling	Home Improve - Bath	Portage Rd	.
3	Portage Flooring	Home Improve - Flooring	Portage Rd	.
4	B & D Flooring	Home Improve - Flooring	Lakeview Dr	.
5	Sackett's Fireplace	Home Improve - Hearth	Sprinkle Rd	.
6	BAM Heating & Cooling	Business - Construction	Coxs Dr	.
1	Garden Partners	Nursery, Garden, Florist	Centre Ave	East
1	Consigned Design Décor	Home Furnishings	Portage Rd	.
1	CNT's Racewear	Family Apparel - Uniforms	Portage Rd	.
2	Mad Hatter's Leather Shop	Accessories - Leather	Portage Rd	.
1	Lazer Center	Recreational Venue	Portage Rd	Center
2	Repetitions Gym	Gyms, Fitness Centers	Centre Ave	West
3	Academy of Arts & Dance	Gyms, Fitness Centers	Portage Rd	.
1	Something for All Seasons	Auto Service, Repair	Portage Rd	South
2	Bills Sound Center	Auto Parts & Supplies	.	.
3	Kalamazoo Choppers	Motorcycle Dealers	Portage Rd	Center

Source: Field and internet research by LandUseUSA | Urban Strategies for the City of Portage; March 2020 and prior to COVID-19. Subject to refinement based on stakeholder input.

List is not intended to be all-inclusive and imperfections are unlikely to alter the conclusions.

Section E

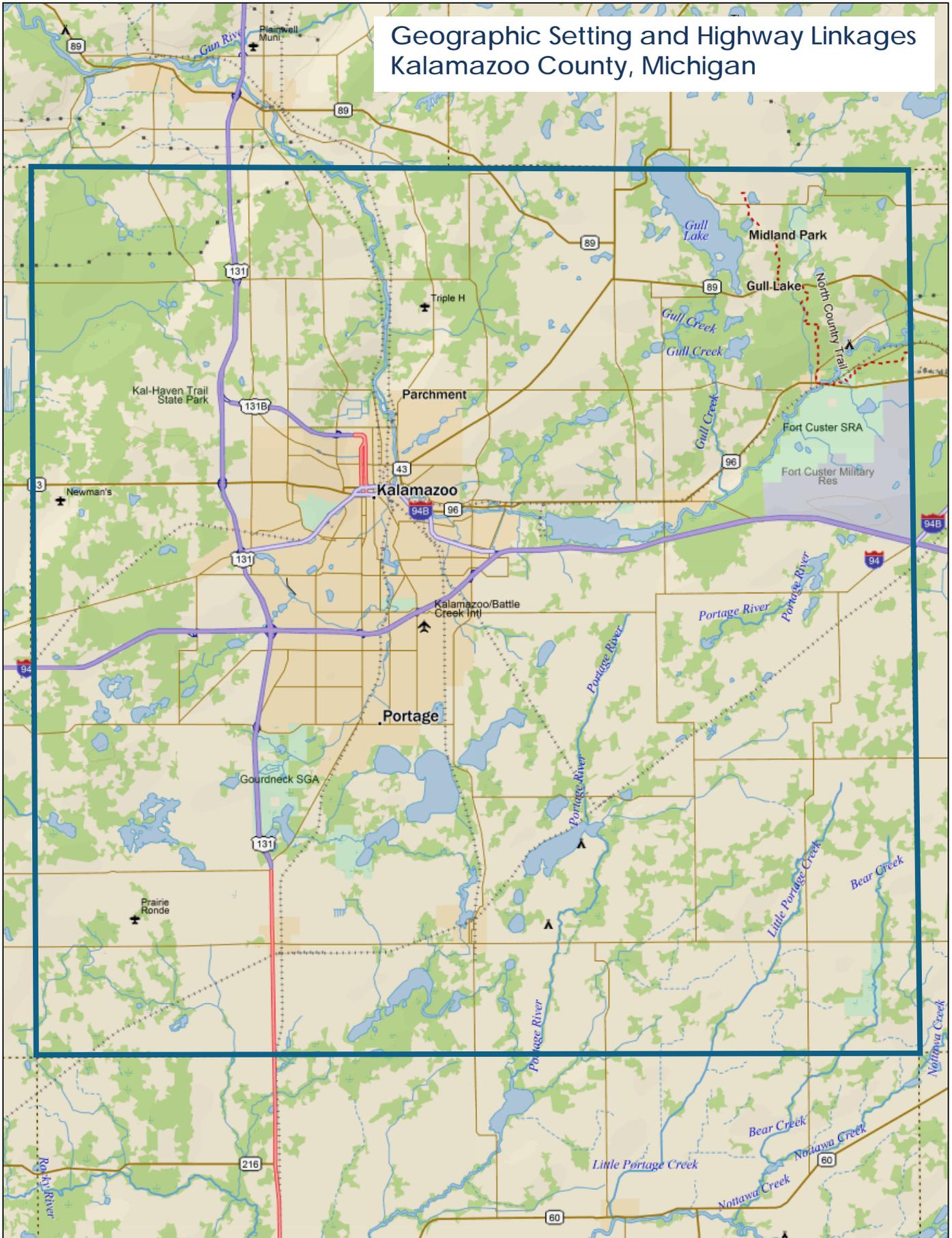
Change in Share of Employment



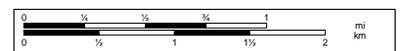
PORTAGE

A Great Place to Play

Geographic Setting and Highway Linkages Kalamazoo County, Michigan



Underlying map provided by Delorme; exhibit prepared by LandUseUSA
Urban Strategies for the City of Portage; March, 2020.



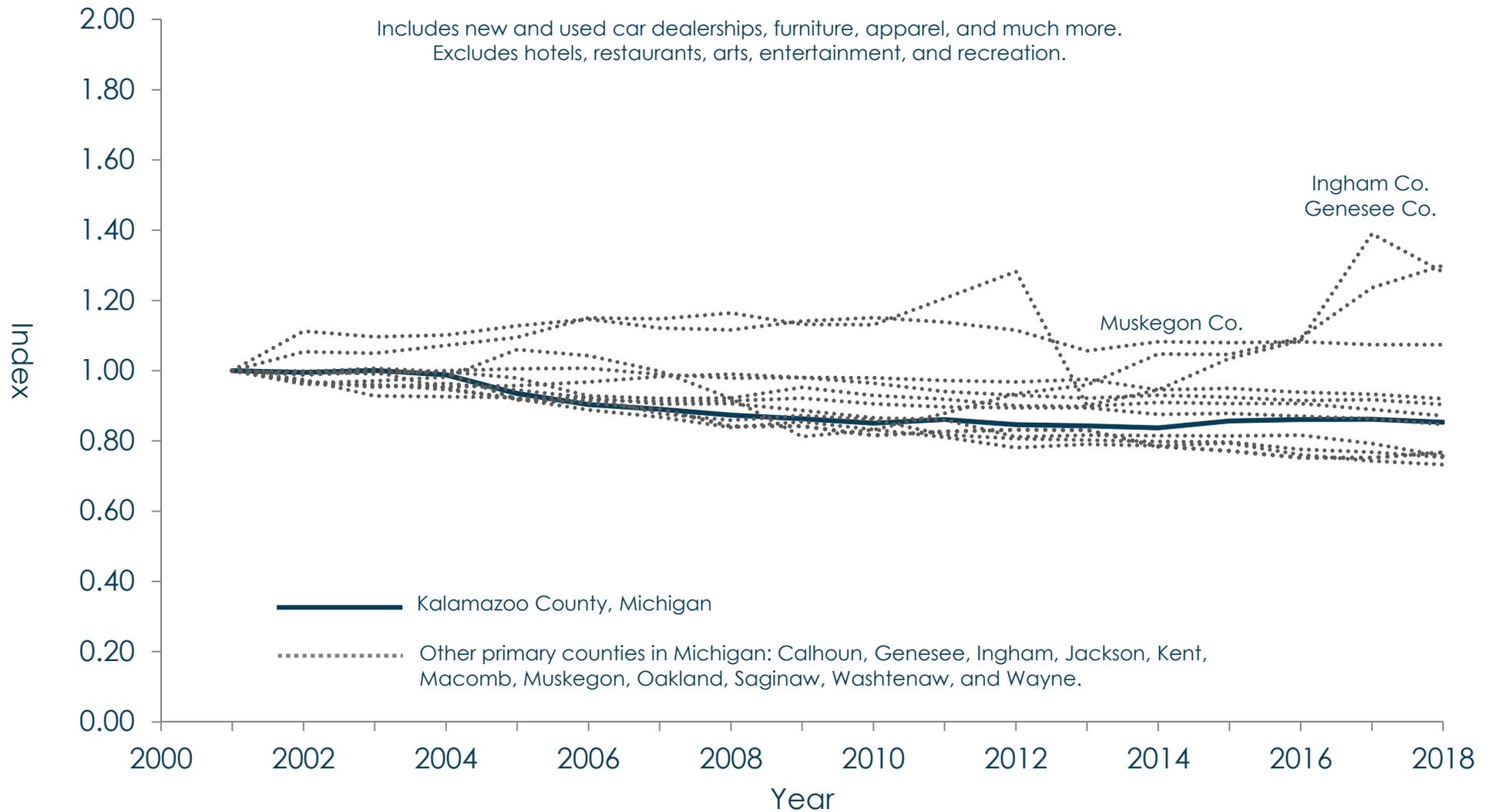
1" = 4,155 ft

Retail Trade

Change in Share of Total Employment (Index)

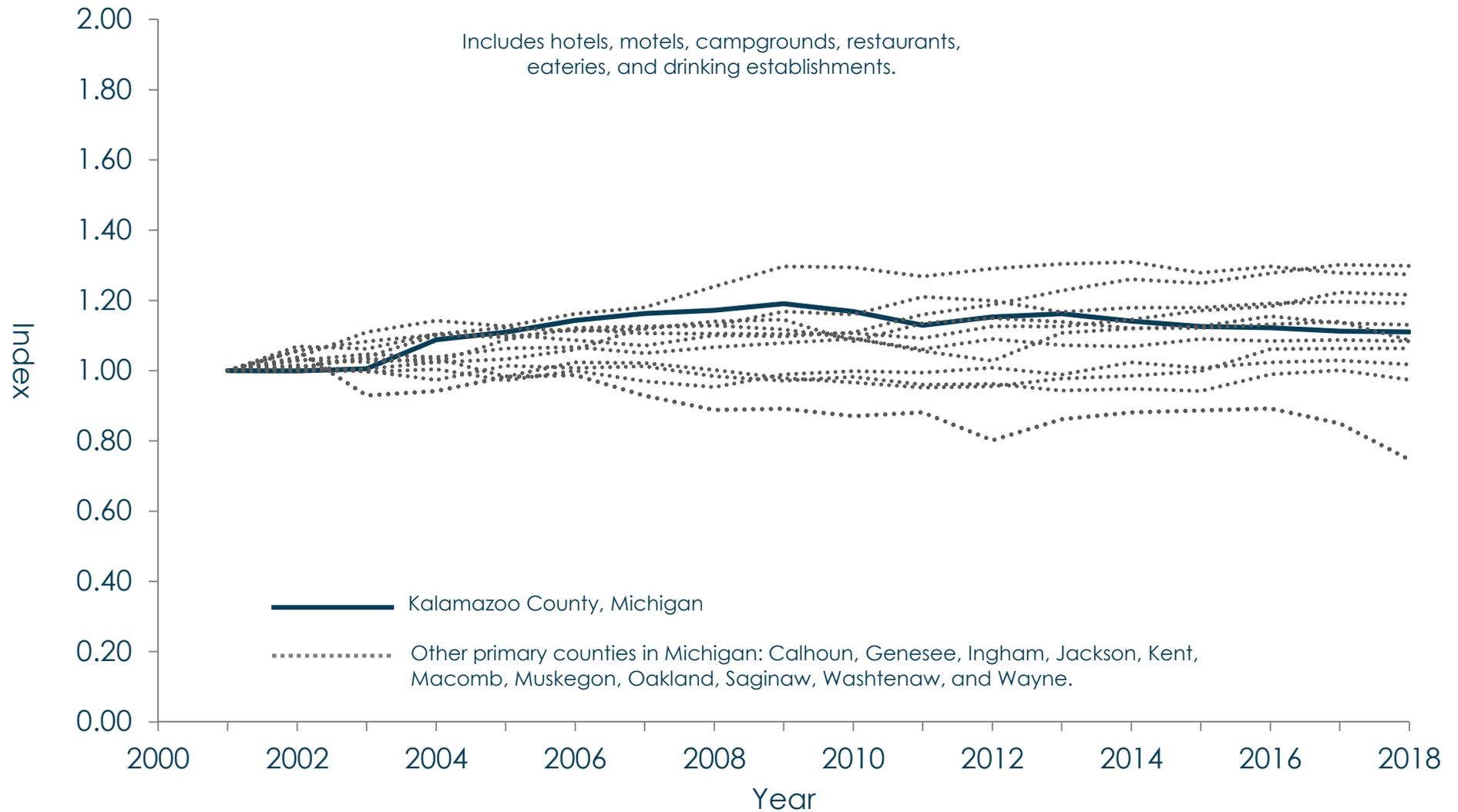
Kalamazoo County v. Other Counties

Includes new and used car dealerships, furniture, apparel, and much more.
Excludes hotels, restaurants, arts, entertainment, and recreation.



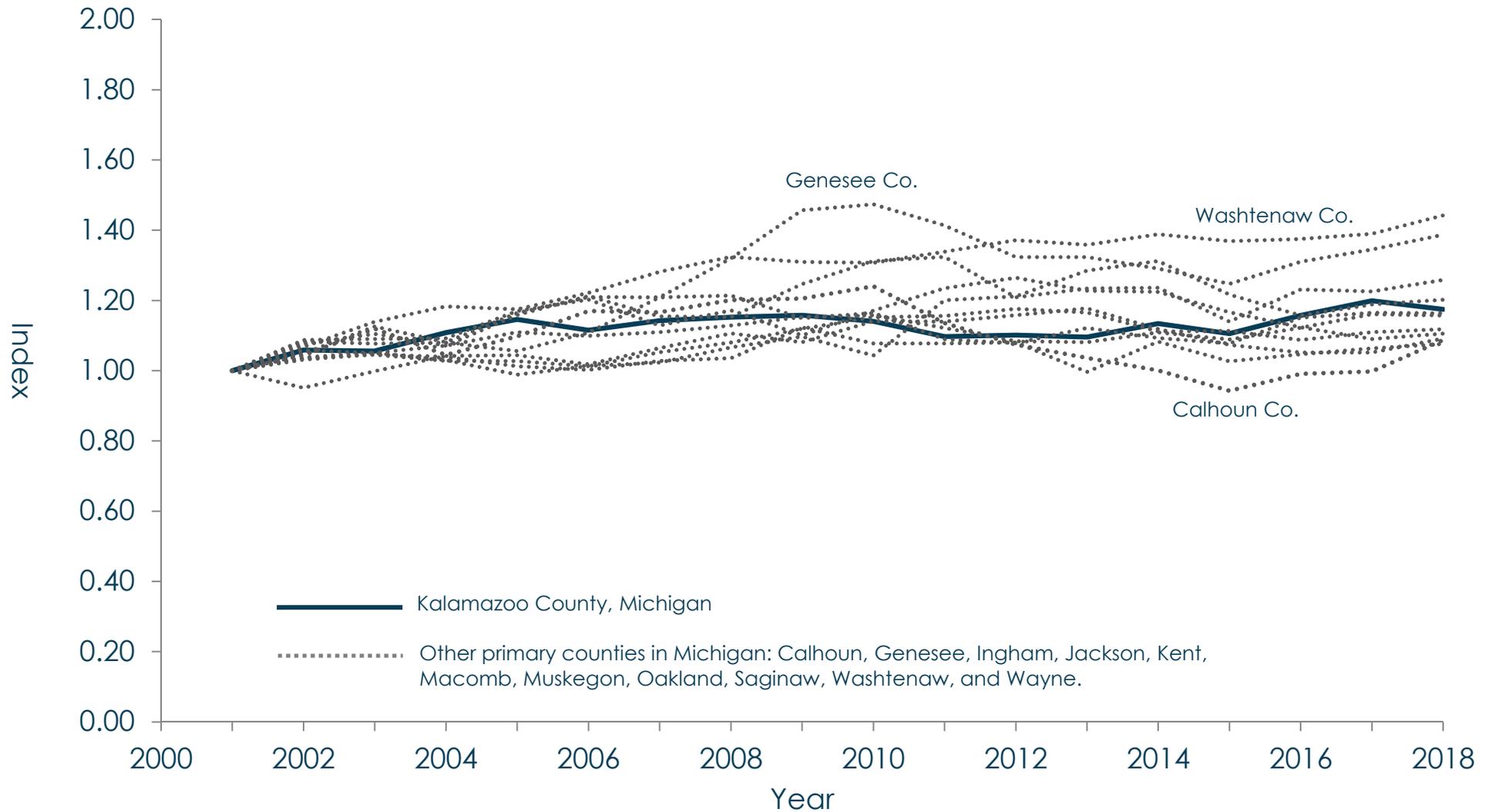
Source: Underlying data provided by the Bureau of Economic Analysis. Calculations, interpolations, analysis, and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage; March 2020.

Accommodations and Food Service Change in Share of Total Employment (Index) Kalamazoo County v. Other Counties



Source: Underlying data provided by the Bureau of Economic Analysis. Calculations, interpolations, analysis, and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage; March 2020.

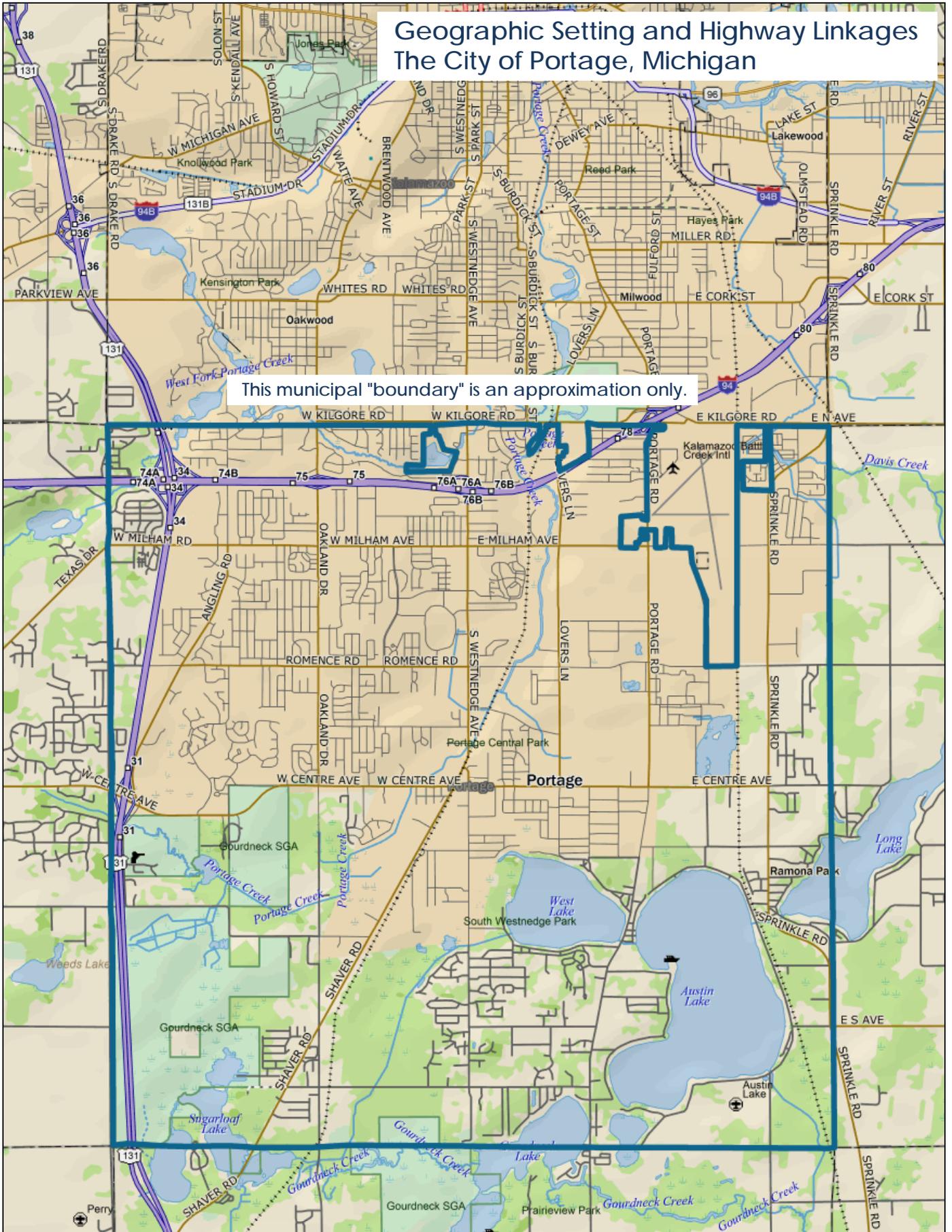
Arts, Entertainment, Recreation Change in Share of Total Employment (Index) Kalamazoo County v. Other Counties



Source: Underlying data provided by the Bureau of Economic Analysis. Calculations, interpolations, analysis, and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage; March 2020.

Geographic Setting and Highway Linkages The City of Portage, Michigan

This municipal "boundary" is an approximation only.



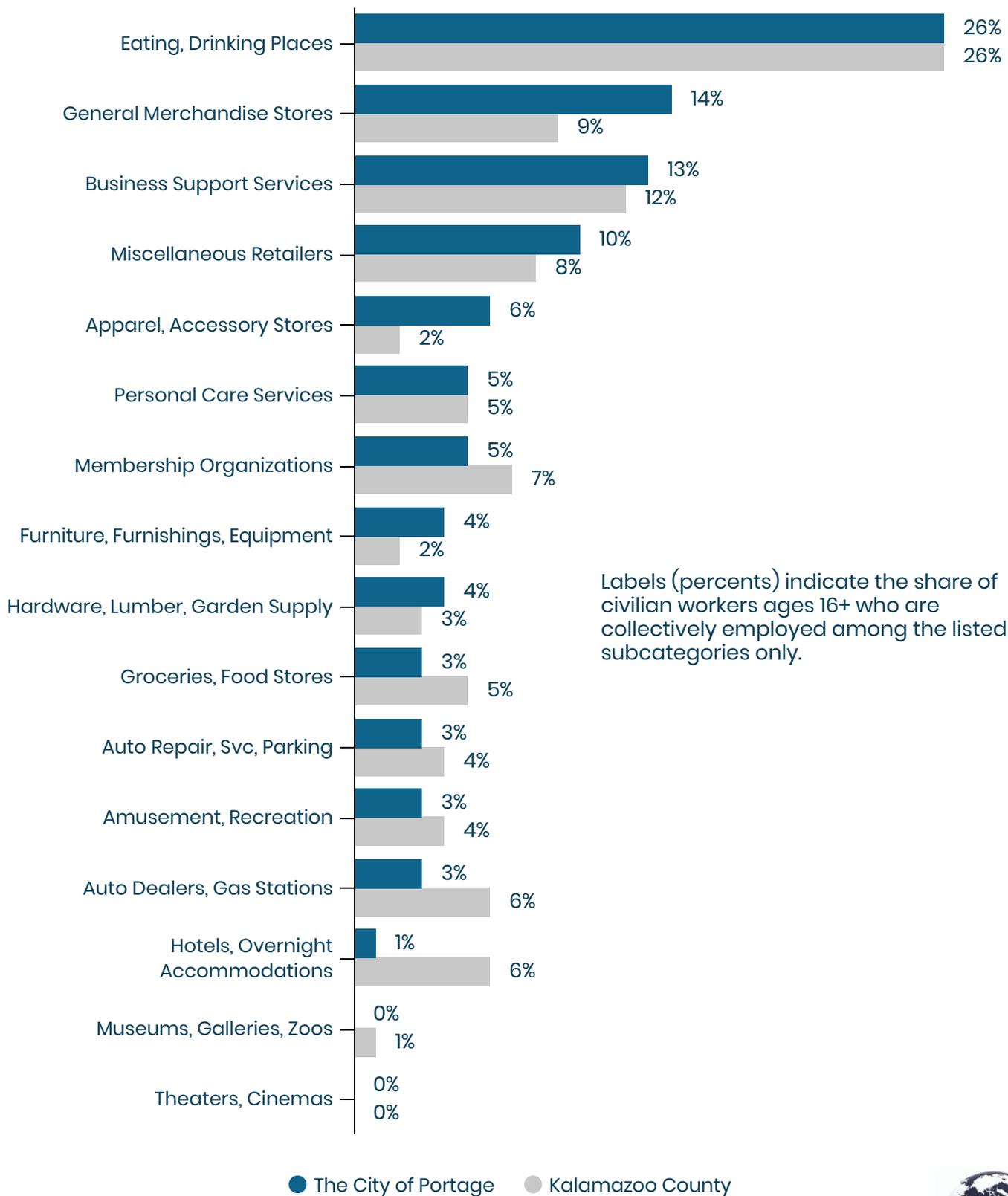
Underlying map provided by Delorme; exhibit prepared by LandUseUSA
Urban Strategies for the City of Portage; March, 2020.



1" = 1,270 ft

Employment by Retail Sector | Portage

A geographic comparison of total employment for retail and related subcategories.



Section **F**

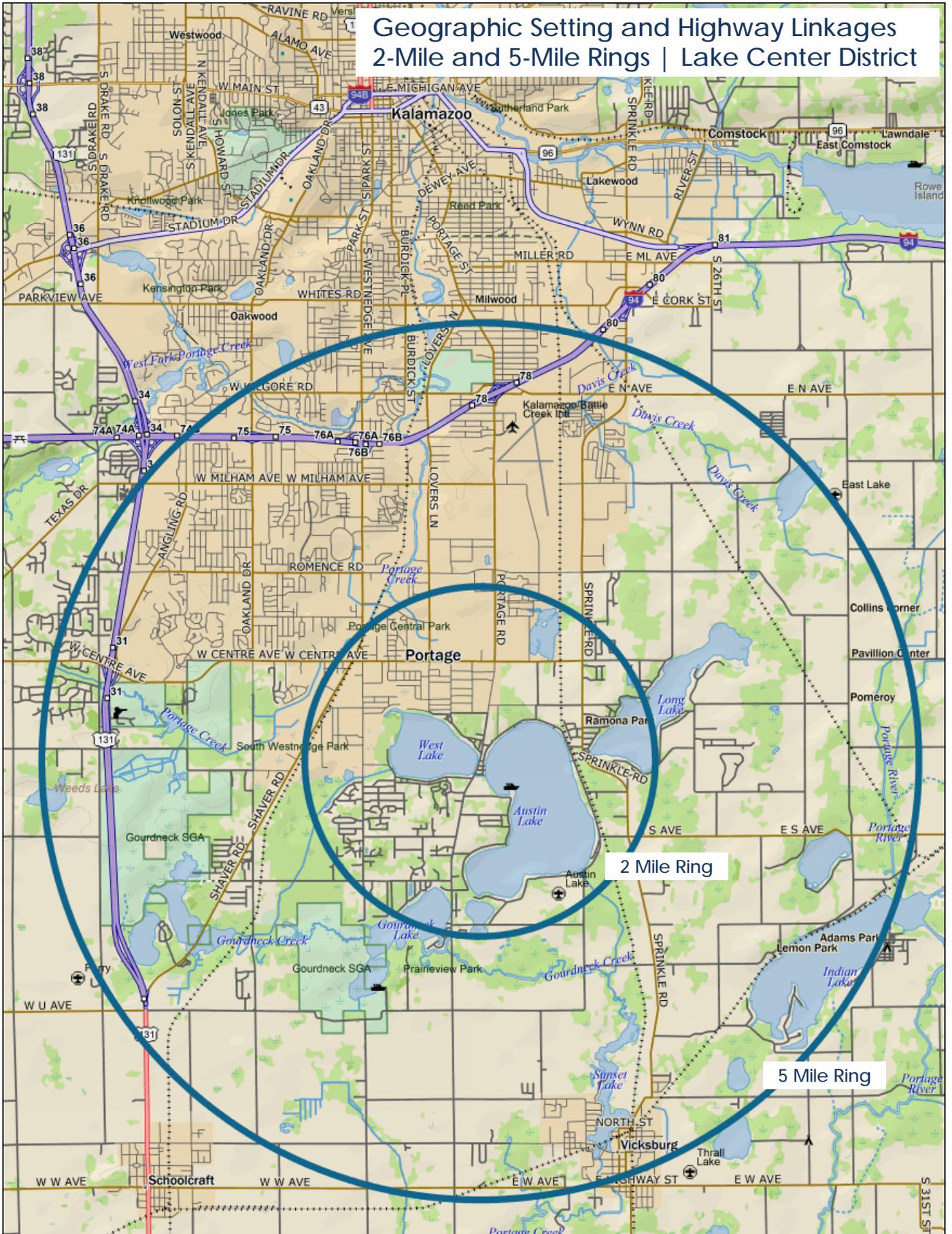
71 Lifestyle Clusters



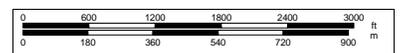
PORTAGE

A Great Place to Play

Geographic Setting and Highway Linkages 2-Mile and 5-Mile Rings | Lake Center District



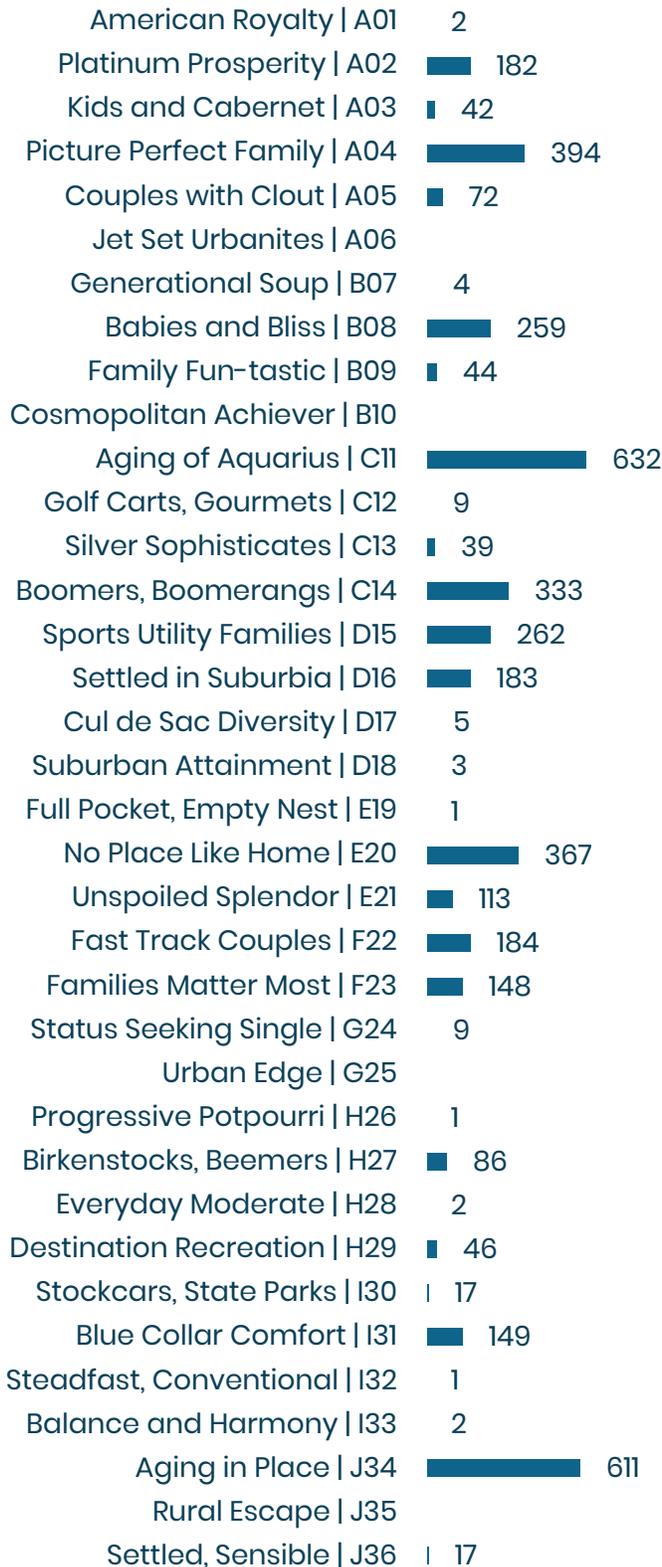
Underlying map provided by Delorme; exhibit prepared by LandUseUSA
Urban Strategies for the City of Portage; March, 2020.



1" = 1,730 ft

1-36 Lifestyle Clusters | Lake Ctr 2 Miles

The number of existing households living within two miles of the Lake Center District.



2020 Total Households = 5,270
 Owners and renters combined.
 80% are represented by these clusters.

37-71 Lifestyle Clusters | Lake Ctr 2 Miles

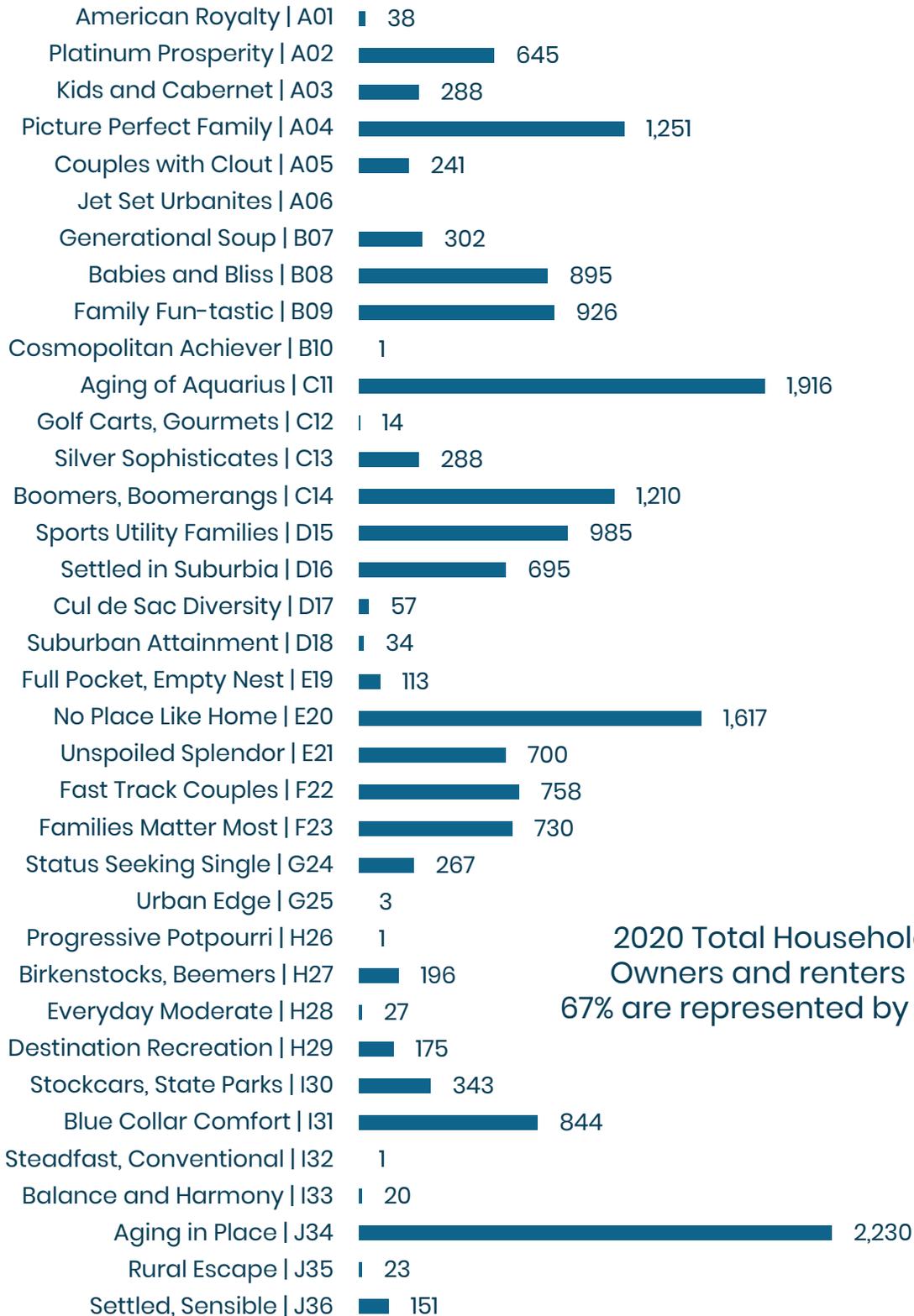
The number of existing households living within two miles of the Lake Center District.

Wired for Success K37	29
Gotham Blend K38	
Metro Fusion K39	2
Bohemian Groove K40	25
Booming, Consuming L41	15
Rooted Flower Power L42	53
Homemade Happiness L43	1
Red, White, Bluegrass M44	5
Infants, Debit Cards M45	30
True Grit American N46	63
Countrified Pragmatic N47	2
Rural Southern Bliss N48	1
Touch of Tradition N49	
Full Steam Ahead O50	11
Digitally Dependent O51	188
Urban Ambition O52	4
Colleges, Cafes O53	
Striving Single Scene O54	8
Family Trooper O55	20
Mid-Scale Medley P56	4
Modest Metro Means P57	
Heritage Heights P58	
Expanding Horizon P59	
Striving Forward P60	1
Humble Beginning P61	
Reaping Rewards Q62	279
Footloose, Family Free Q63	12
Town Elder, Leader Q64	156
Senior Towers Q65	100
Daring to Dream R66	5
Hope for Tomorrow R67	
Small Town, Shallow Pocket S68	34
Urban Survivor S69	
Tight Money S70	
Tough Times S71	3

2020 Total Households = 5,270
 Owners and renters combined.
 20% are represented by these clusters.

1-36 Lifestyle Clusters | Lake Ctr 5 Miles

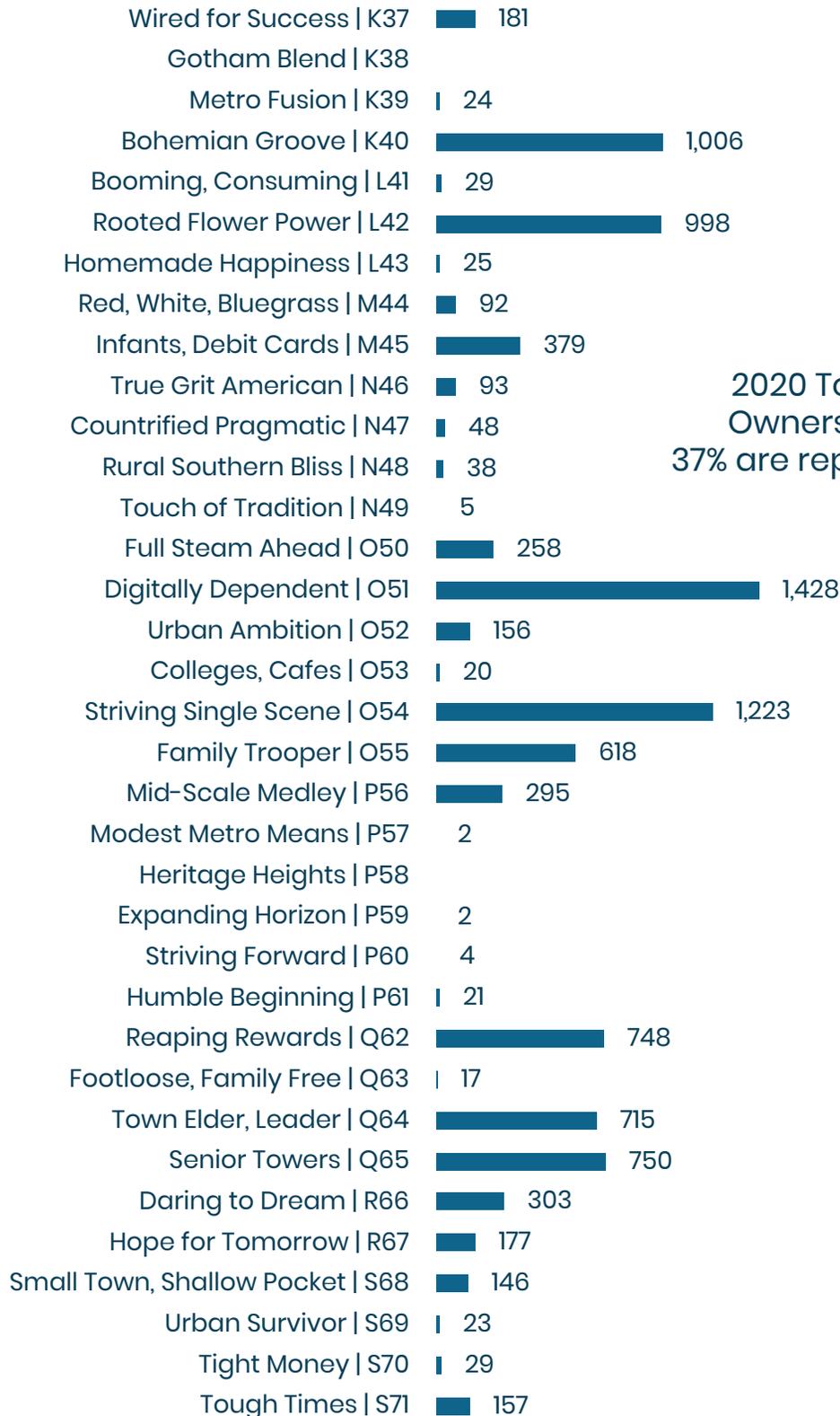
The number of existing households living within five miles of the Lake Center District.



2020 Total Households = 28,000
 Owners and renters combined.
 67% are represented by these clusters.

37-71 Lifestyle Clusters | Lake Ctr 5 Miles

The number of existing households living within five miles of the Lake Center District.



2020 Total Households = 28,000
 Owners and renters combined.
 37% are represented by these clusters.

Underlying Mosaic Lifestyle Clusters provided by Experian Decision Analytics through year-end 2019 and forecast to 2020 by LandUseUSA | Urban Strategies. Analysis & exhibit prepared by LandUseUSA for the City of Portage; February 2020.



Half of all Lifestyle Clusters | Nationwide

A01 – J36 | Better-to-Upper Incomes

- A01 | American Royalty - Wealthy influential couples and families in prestigious communities - Suburbs.
A02 | Platinum Prosperity - Wealthy and established empty-nesting couples - Suburbs.
A03 | Children & Cabernet - Prosperous, middle-aged married couples focused on their children's lives - Suburbs.
A04 | Picture Perfect Families - Established families of child-raising households in wealthy communities - Suburbs.
A05 | Couples with Clout - Middle-aged childless couples living in affluent areas - Metros.
A06 | Jet Set Urbanites - Mix of affluent singles and couples enjoying diverse neighborhoods - Urban.
- B07 | Generational Soup - Affluent couples and multi-generational families, wide range of lifestyles - Suburbs.
B08 | Babies & Bliss - Middle-aged couples with large families and active lives - Suburbs.
B09 | Family Funtastic - Upscale, middle-aged families with busy lives focused on older children - Satellite Cities.
B10 | Cosmopolitan Achievers - Affluent middle-aged, established couples & families, dynamic lifestyles - Metros.
- C11 | Aging of Aquarius, Settled - Upscale boomer couples settled in detached houses - Cities, Nearby Suburbs.
C12 | Golf Carts & Gourmets - Upscale retirees & empty-nesters in comfortable golf communities - Urban Edges.
C13 | Silver Sophisticates - Mature, upscale couples & singles in larger detached houses - Suburbs.
C14 | Boomers & Boomerangs - Baby boomer adults with young adult children sharing their house - Suburbs.
- D15 | Sports Utility Families - Upscale, multi-generational, middle-aged families, active lifestyles - Outer Suburbs.
D16 | Settled in Suburbia - Upper-middle-income diverse families & empty nesters - Established Suburbs.
D17 | Cul de Sac Diversity - Culturally diverse, middle-aged families settling into emerging communities - Suburbs.
D18 | Suburban Attainment - Upper middle-class couples and families moving to newer communities - Suburbs.
- E19 | Full Pockets & Empty Nests - Empty-nesters, discretionary income and sophisticated lifestyles - Most Cities.
E20 | No Place Like Home - Middle-to-upper income, multi-generational households, detached houses - Urban Edges.
E21 | Unspoiled Splendor - Comfortably established baby boomer couples, detached houses - Small Cities, Rural.
F22 | Fast Track Couples - Young, upwardly-mobile couples with active lifestyles - Inner Suburbs.
F23 | Families Matter Most - Young, middle-to-upper income families with active, family-focused lives - Suburbs.
- G24 | Status Seeking Singles - Young, upwardly-mobile singles balancing work and leisure - Metros, Urban.
G25 | Urban Edge - Younger, up-and-coming singles living big-city lifestyles - Largest Metros.
- H26 | Progressive Potpourri - Mature couples with comfortable and active lives - Suburbs.
H27 | Birkenstocks & Beemers - Middle-to-upper income couples living leisurely lifestyles - Small Cities.
H28 | Everyday Moderates - Multi-cultural couples & families choosing modest lifestyles - Suburbs to Mid-sized Cities.
H29 | Destination Recreation - Middle-aged couples working hard to support active lifestyles - Small Cities, Suburbs.
- I30 | Stockcars & State Parks - Middle-income couples & families seeking affordable entertainment - Small Cities.
I31 | Blue Collar Comfort - Middle-income families working solid, blue-collar jobs - Small Cities.
I32 | Steadfast Conventionalists - Conventional Gen-X families in conventional detached houses - Coastal Cities.
I33 | Balance & Harmony - Middle-income families with lively lifestyles - City-Centric Neighborhoods.
- J34 | Aging in Place Already - Middle-income seniors established in their homes, preferring to stay - Suburban.
J35 | Rural Escape - Older, middle-income couples & singles, living modestly, comfortably - Small Cities, Rural Edges.
J36 | Settled & Sensible - Older, middle-income, empty nest couples & singles living sensibly - City Neighborhoods.

Half of all Lifestyle Clusters | Nationwide

K37 – S71 | Lower-to-Moderate Incomes

- K37 | Wired for Success - Young, middle-income singles and couples living socially-active lives - Cities.
- K38 | Gotham Blend - Middle-aged, middle-income singles & couples with big city lifestyles - Urban, Large Cities.
- K39 | Metro Fusion - Middle-aged singles living active lifestyles with a wide range of backgrounds - Urban.
- K40 | Bohemian Groove - Older, unattached singles enjoying settled lives in detached houses - Urban Neighborhoods.
- L41 | Booming & Consuming - Older empty nester couples and singles enjoying relaxed lifestyles - Small Cities.
- L42 | Rooted Flower Power - Middle-income baby boomer singles & couples, rooted & nearing retirement - Suburban.
- L43 | Homemade Happiness - Middle-income baby boomers in detached houses - Small Cities, Rural.
- M44 | Red, White, Bluegrass - Middle-income families with diverse household dynamics - Rural.
- M45 | Infants and Debit Cards - Young, working families & single parents in small houses - Urban Neighborhoods.
- N46 | True Grit Americans - Older, middle-income households located in nation's mid-section - Small Cities, Rural.
- N47 | Countrified Pragmatics - Middle-income couples and singles with casual lifestyles - Rural.
- N48 | Rural Country Bliss - Middle-income, multi-generational families in the nation's south - Small Cities, Rural.
- N49 | Touch of Tradition - Working, middle-aged couples and singles in detached houses - Rural.
- O50 | Full Steam Ahead - Young and middle-aged singles on the move forward and upward - Mid-Sized Cities.
- O51 | Digital Dependents - Gen-X and Gen-Y singles living digitally-driven lifestyles - Urban.
- O52 | Urban Ambition - Gen-Y singles, some with children, moving into urban places - Mid-Sized Cities, Urban.
- O53 | Colleges & University Affiliates - Young singles, alumni, recent grads, staff connected to colleges - College Towns.
- O54 | Striving Single Scene - Young singles, upwardly mobile, aspiring in early careers - City Centers, Urban.
- O55 | Family Troopers - Families & single parents, with current or recent connections to the military - Nationwide.
- P56 | Mid-Scale Medley - Middle-aged, moderate-income singles, many starting over - Mid-Sized Cities.
- P57 | Modest Metro Means - Moderate-income singles settled in moderate communities - Inner-City Neighborhoods.
- P58 | Heritage Heights - Moderate-income singles & families settled in apartments - Urban, Compact Neighborhoods.
- P59 | Expanding Horizons - Middle-aged, middle-income families - Border Towns.
- P60 | Striving Forward - Moderate-income families & single parents in newer communities - Urban Edges.
- P61 | Humble Beginnings - Multi-cultural singles, some with children, starting in apartments - Inner-Cities, Urban.
- Q62 | Reaping Rewards - Retired couples and widowed singles living relaxed, quiet lives in detached houses - Suburban.
- Q63 | Footloose and Family Free - Older couples and widowed singles living active, comfortable lives - Urban Edges.
- Q64 | Town Elders & Leaders - Elders and community leaders settled into small houses and living frugally - Small Cities.
- Q65 | Senior Discounts & Towers - Low-income seniors in apartments with some rent assistance - Metros, City Edges.
- R66 | Daring to Dream - Aspiring young couples & singles, some with children, just starting out - Inner-City, Urban.
- R67 | Hoping Tomorrow - Hopeful, young, single parents with low-incomes, living in apartments - Mid-Sized Cities.
- S68 | Small Towns & Shallow Pockets - Older, low-income empty nesters & singles, tight budgets. - Small Satellite Cities.
- S69 | Urban Survivors - Older, low-income singles, some with children, settled & living modestly - Urban Neighborhoods.
- S70 | Tight Money - Middle-aged, low-income, unattached singles seeking to move upward - Small Cities, Urban Edges.
- S71 | Tough Times - Older, low-income singles, struggling to get by, apartments - Inner-Cities, Compact Neighborhoods.

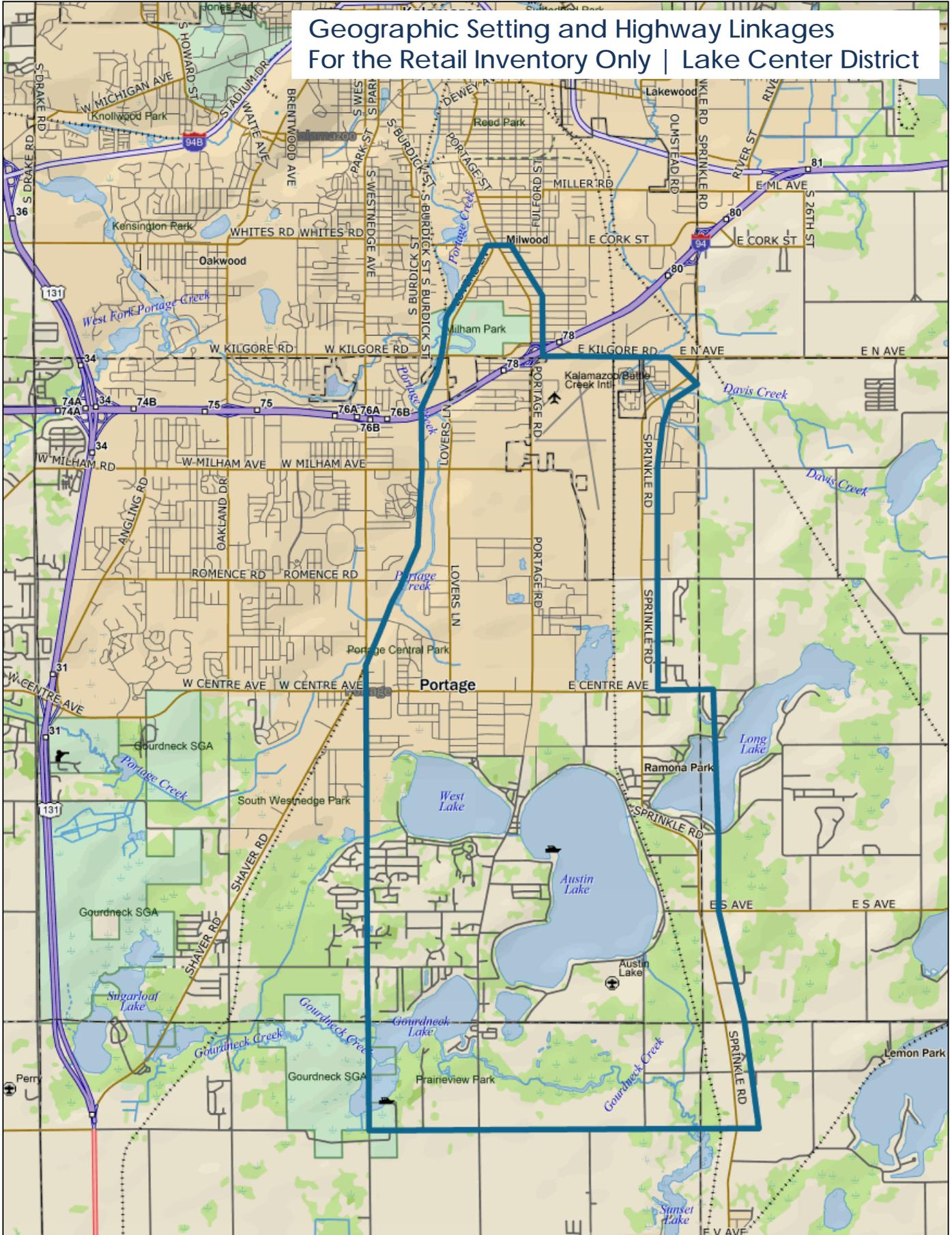
Section **G**
Participation in
Lifestyle Activities



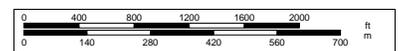
PORTAGE

A Great Place to Play

Geographic Setting and Highway Linkages For the Retail Inventory Only | Lake Center District



Underlying map provided by Delorme; exhibit prepared by LandUseUSA
Urban Strategies for the City of Portage; March, 2020.

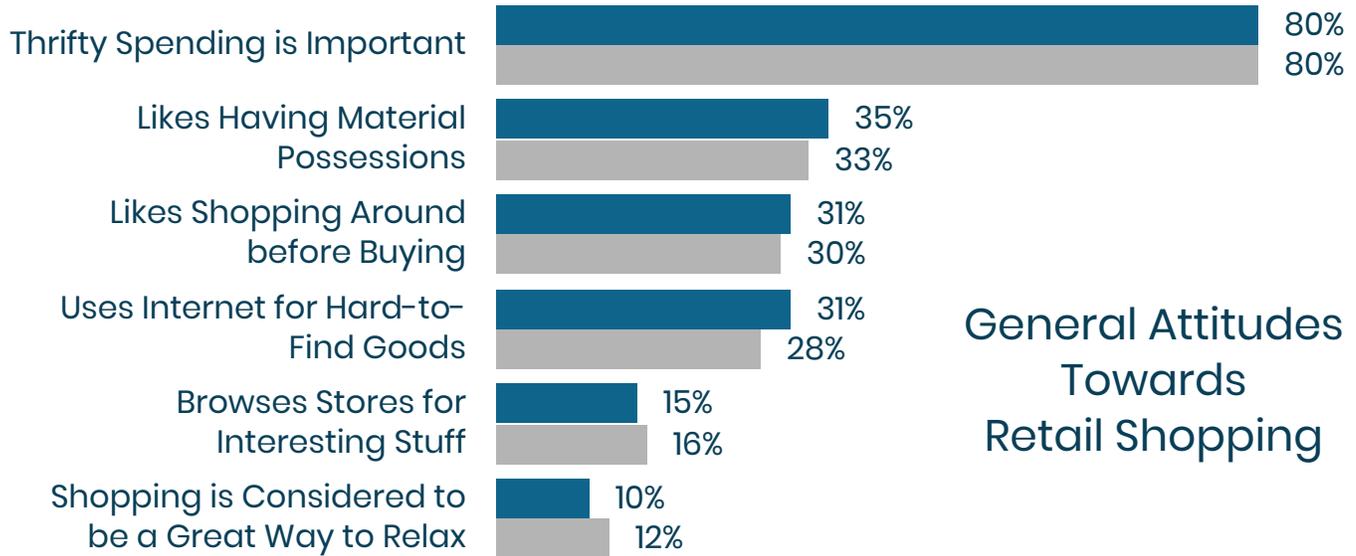


1" = 1,385 ft

Lifestyle Preferences | Lake Ctr District

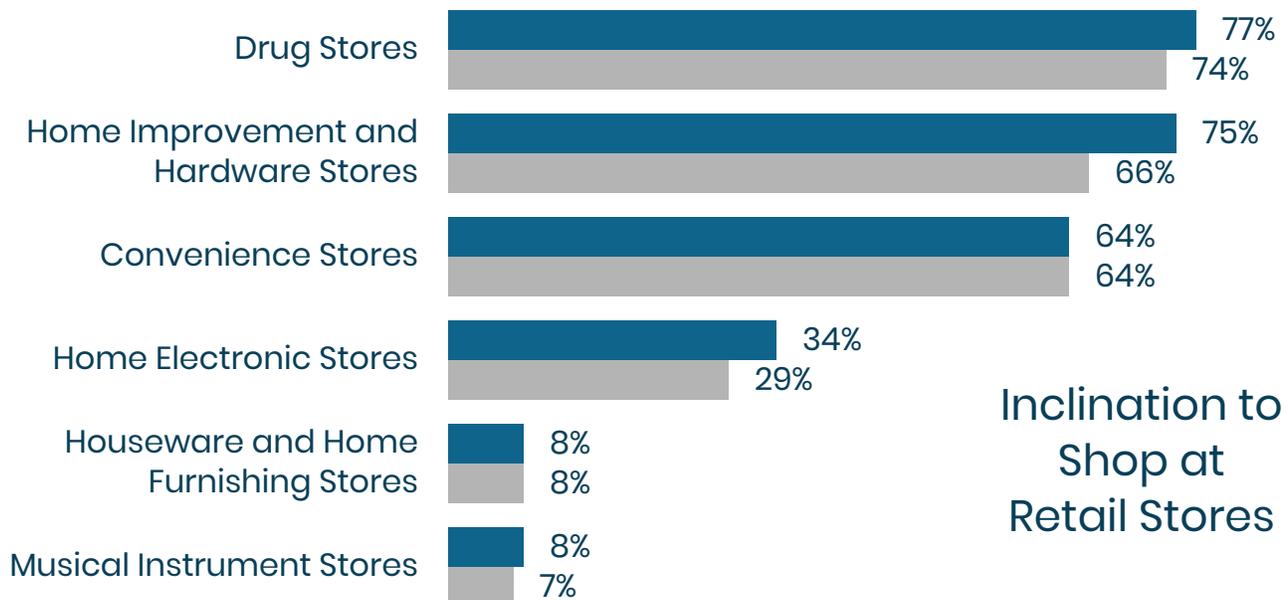
Share of established residents that participate in lifestyle types of activities.

Share of Households Participating in Lifestyle Types of Activities



General Attitudes Towards Retail Shopping

● Portage Lake Center District ● The State of Michigan



Inclination to Shop at Retail Stores

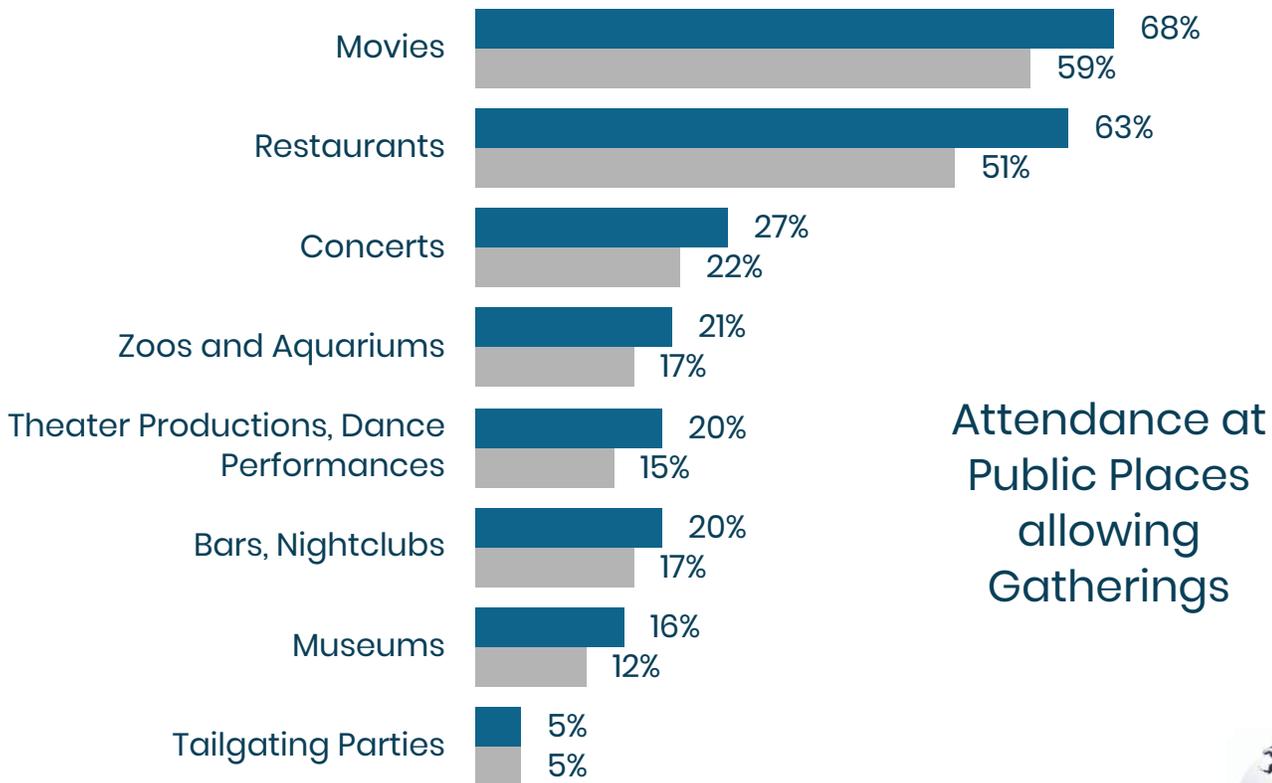
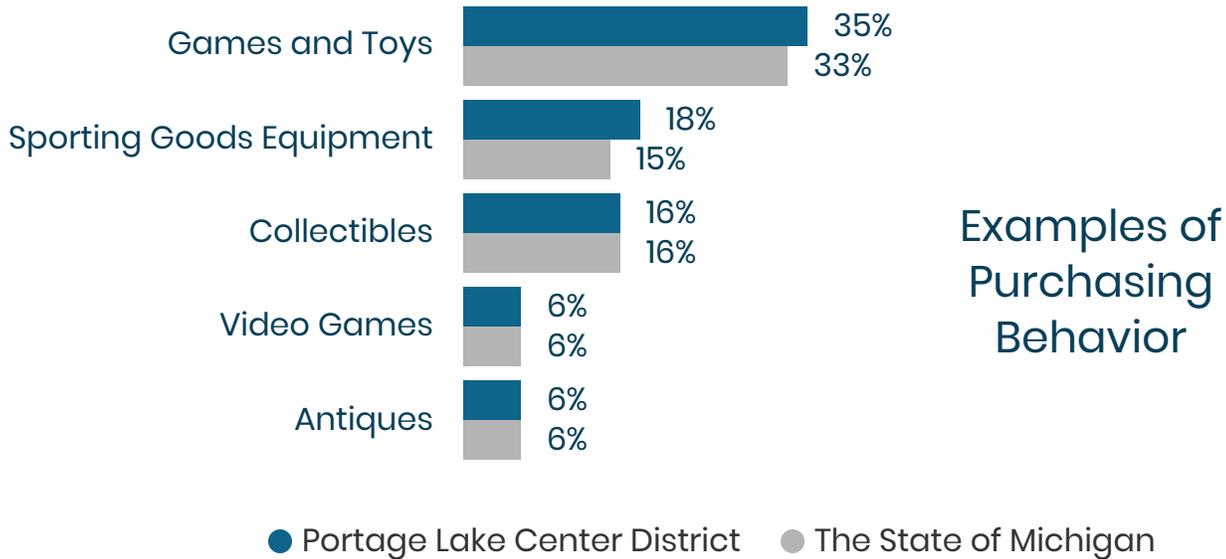
Underlying data (number of establishments and annual revenues) provided by ScanUS through 2019. Results based on a qualified market share analysis by LandUseUSA | Urban Strategies for the City of Portage, Michigan; May 2020.



Lifestyle Preferences | Lake Ctr District

Share of established residents that participate in lifestyle types of activities.

Share of Households Participating in Lifestyle Types of Activities



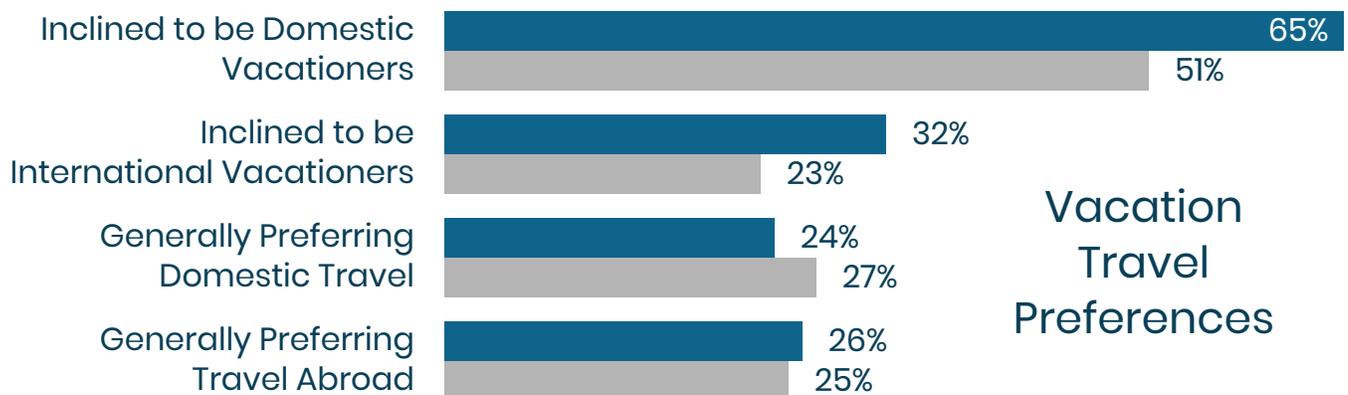
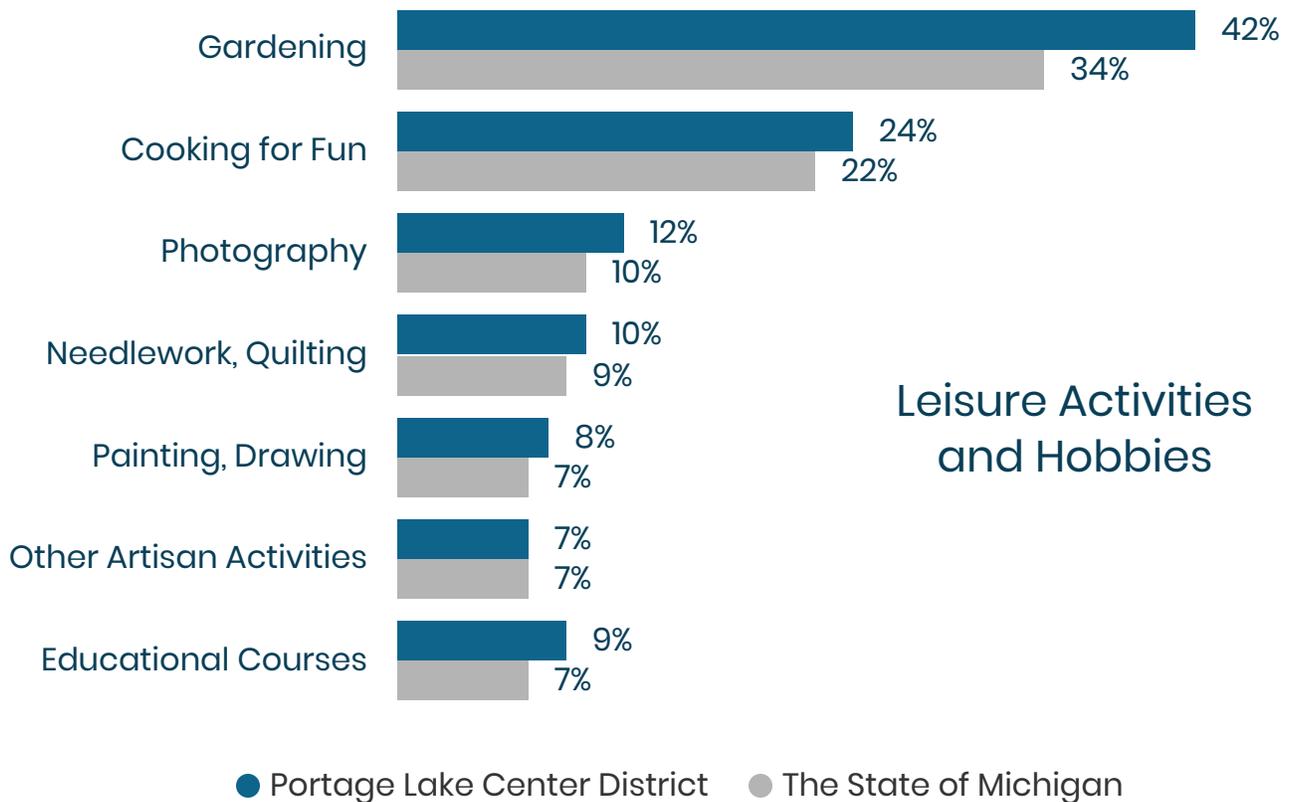
Underlying data (number of establishments and annual revenues) provided by ScanUS through 2019. Results based on a qualified market share analysis by LandUseUSA | Urban Strategies for the City of Portage, Michigan; May 2020.



Lifestyle Preferences | Lake Ctr District

Share of established residents that participate in lifestyle types of activities.

Share of Households Participating in Lifestyle Types of Activities



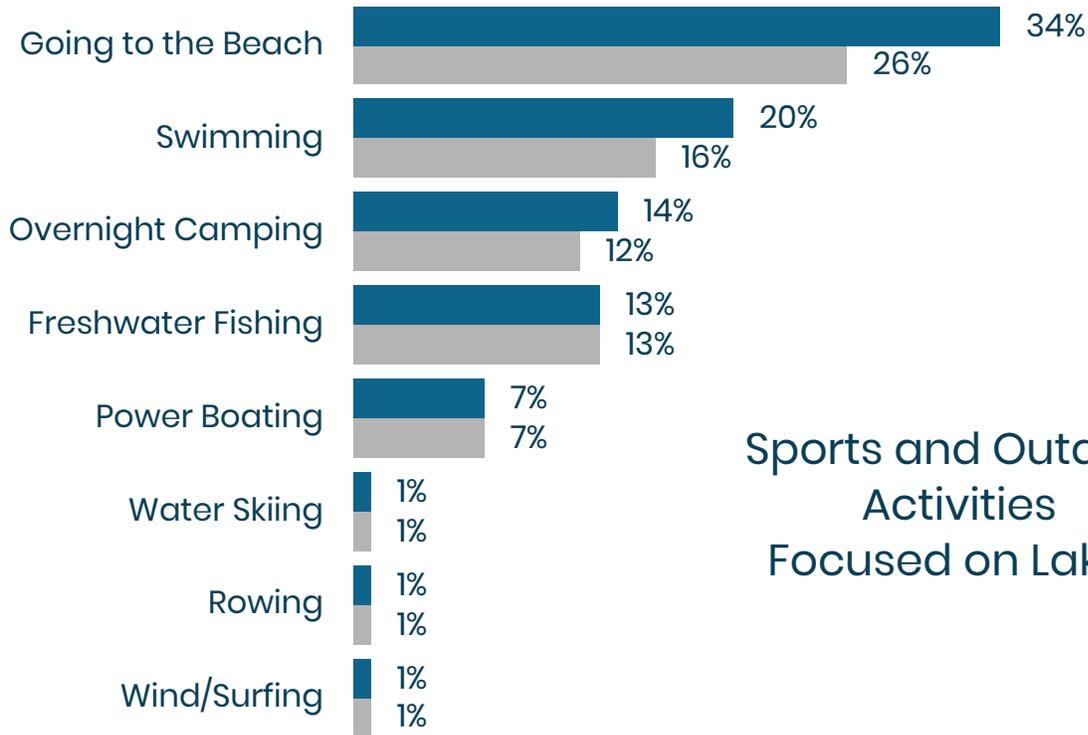
Underlying data (number of establishments and annual revenues) provided by ScanUS through 2019. Results based on a qualified market share analysis by LandUseUSA | Urban Strategies for the City of Portage, Michigan; March 2020.



Lifestyle Preferences | Lake Ctr District

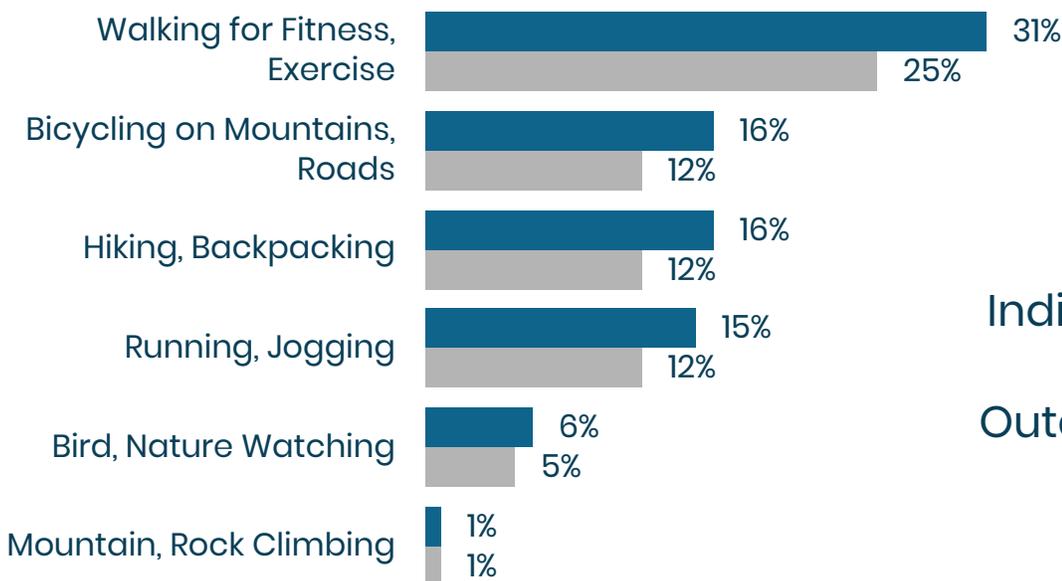
Share of established residents that participate in lifestyle types of activities.

Share of Households Participating in Lifestyle Types of Activities



Sports and Outdoor Activities Focused on Lakes

● Portage Lake Center District ● The State of Michigan



Other Individual Sports and Outdoor Activities

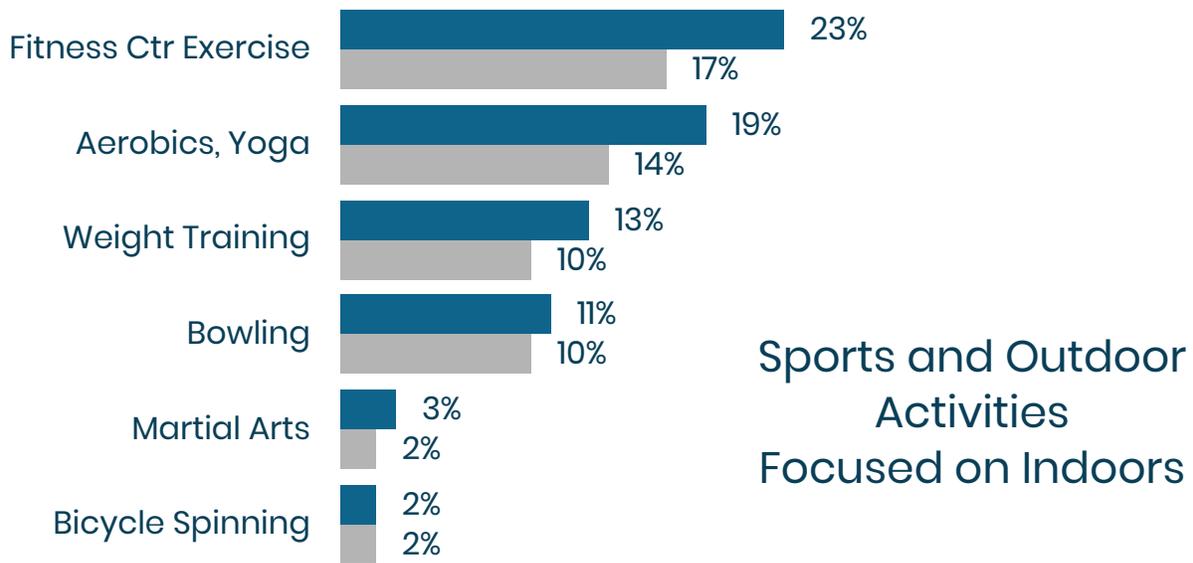
Underlying data (number of establishments and annual revenues) provided by ScanUS through 2019. Results based on a qualified market share analysis by LandUseUSA | Urban Strategies for the City of Portage, Michigan; May 2020.



Lifestyle Preferences | Lake Ctr District

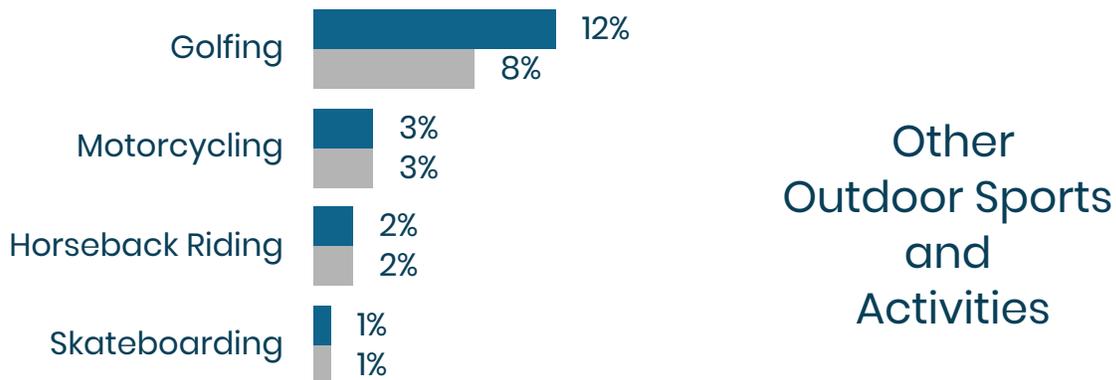
Share of established residents that participate in lifestyle types of activities.

Share of Households Participating in Lifestyle Types of Activities



Sports and Outdoor Activities Focused on Indoors

● Portage Lake Center District ● The State of Michigan



Other Outdoor Sports and Activities

Underlying data (number of establishments and annual revenues) provided by ScanUS through 2019. Results based on a qualified market share analysis by LandUseUSA | Urban Strategies for the City of Portage, Michigan; May 2020.



Section H

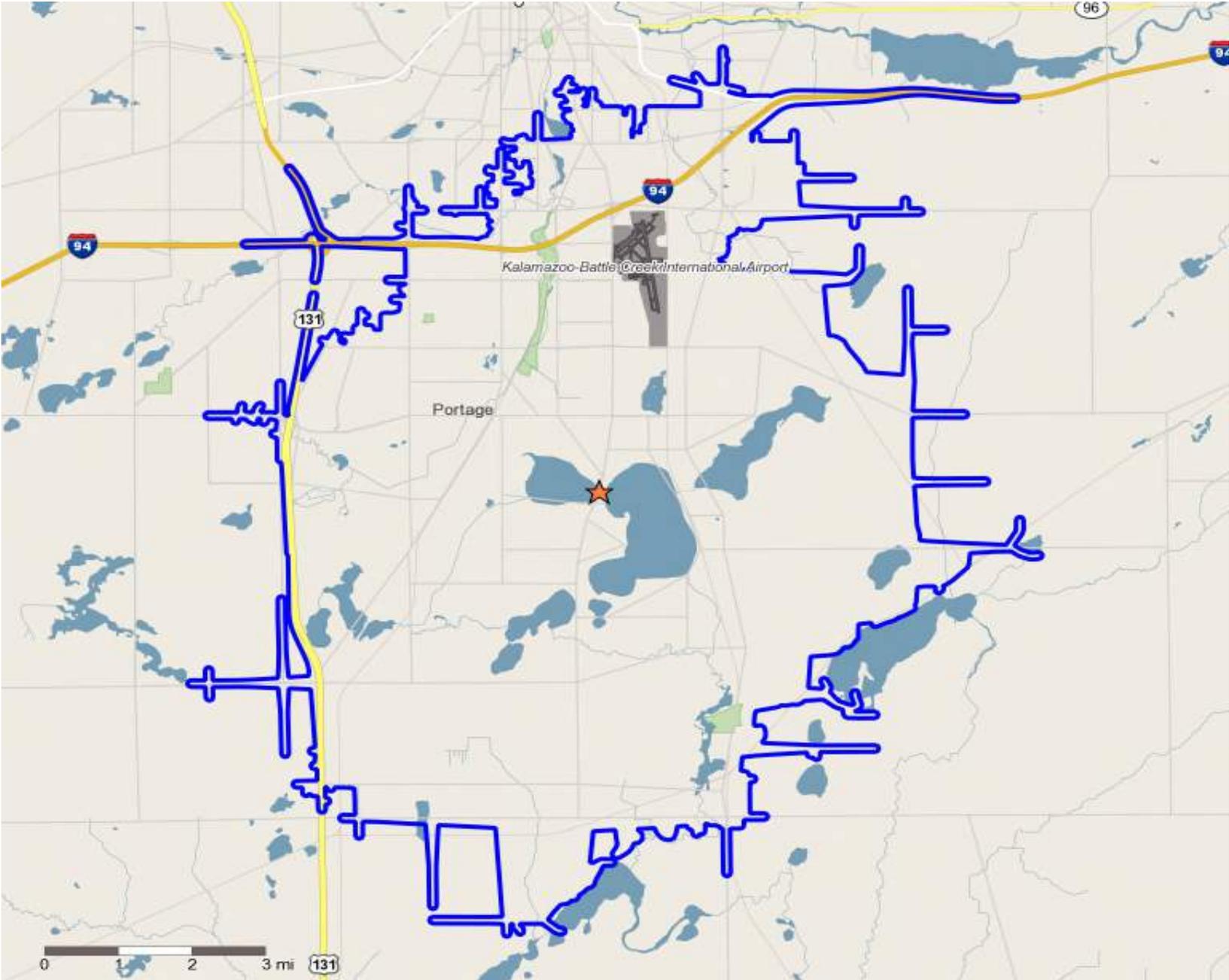
Market Parameters by Geography



PORTAGE

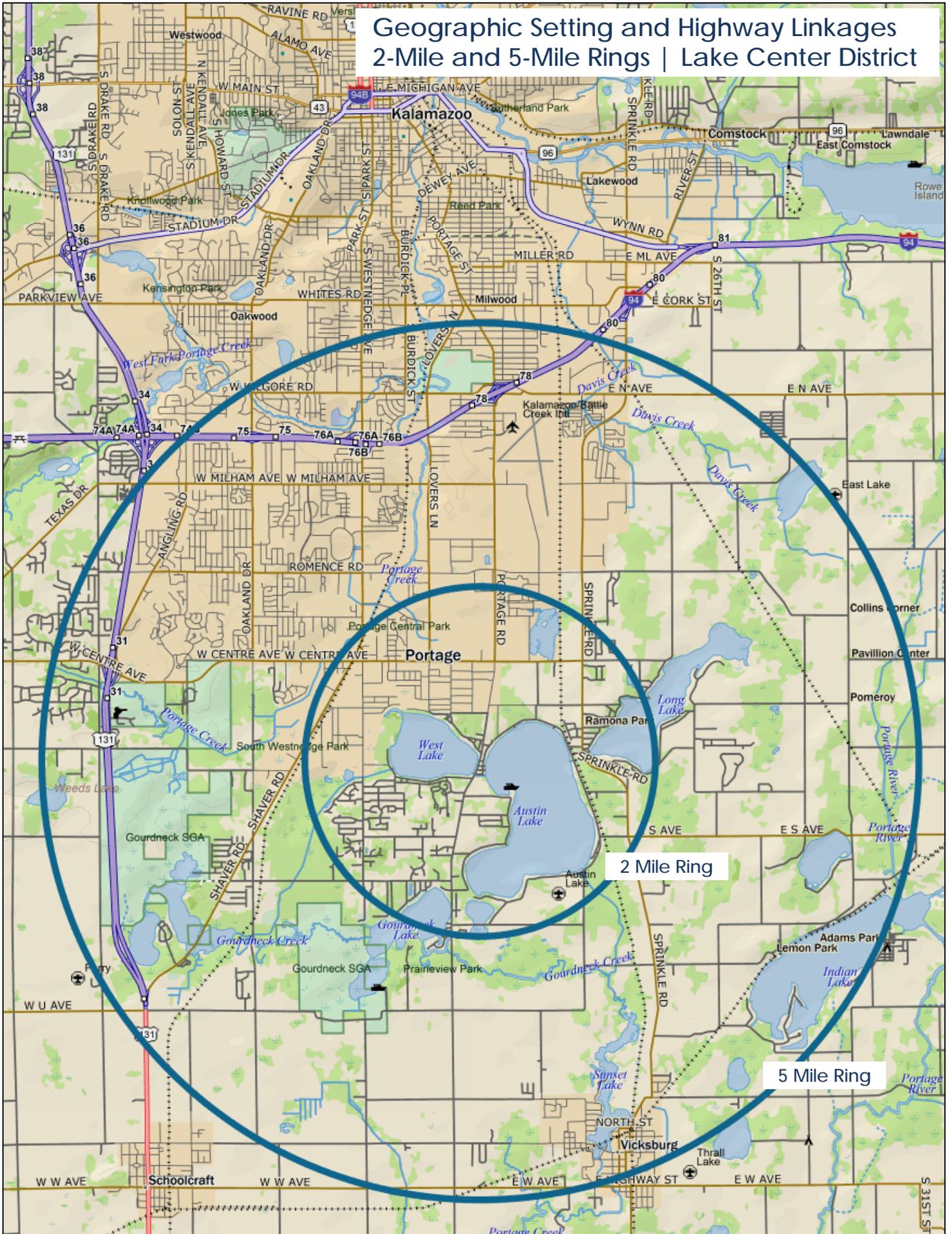
A Great Place to Play

Geographic Setting and Highway Linkages
Fifteen (15) Minute Drive Time Analysis | Lake Center District

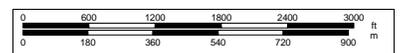


Underlying map and drive-time analysis provided by Experian Decision Analytics; exhibit prepared by LandUseUSA Urban Strategies for the City of Portage; March, 2020.

Geographic Setting and Highway Linkages 2-Mile and 5-Mile Rings | Lake Center District



Underlying map provided by Delorme; exhibit prepared by LandUseUSA
Urban Strategies for the City of Portage; March, 2020.



1" = 1,730 ft

Retail Market Parameters | Age, Income, Marital Status 2-Mile Radius | Lake Center District | Portage, Michigan

	2000	2000	2010	2010	2019	2019
Population by Age	Census	Share	Census	Share	Estimates	Share
0 to 4	619	5.7%	788	6.5%	714	5.6%
5 to 14	1,596	14.6%	1,648	13.6%	1,689	13.3%
15 to 19	660	6.0%	716	5.9%	724	5.7%
20 to 24	471	4.3%	460	3.8%	646	5.1%
25 to 34	1,338	12.2%	1,363	11.2%	1,315	10.3%
35 to 44	1,863	17.0%	1,710	14.1%	1,666	13.1%
45 to 54	1,717	15.7%	1,801	14.8%	1,655	13.0%
55 to 64	1,096	10.0%	1,654	13.6%	1,775	14.0%
65 to 74	857	7.8%	1,032	8.5%	1,475	11.6%
75 to 84	554	5.1%	709	5.8%	737	5.8%
85+	171	1.6%	272	2.2%	326	2.6%
Total Population (sum)	10,941	100%	12,153	100%	12,721	100%
Median Age	40	.	41	.	43	.
Per Capita Income	\$25,673	.	\$29,958	.	\$37,461	.
	2000	2000	2010	2010	2019	2019
Marital Status Ages 15+	Census	Share	Census	Share	Estimates	Share
Married, Spouse Present	5,317	61%	5,826	60%	5,923	57%
Married, Spouse Absent	186	2%	96	1%	146	1%
Divorced	931	11%	1,167	12%	1,200	12%
Widowed	530	6%	677	7%	654	6%
Never Married	1,760	20%	1,952	20%	2,396	23%
Total Pop Ages 15+ (sum)	8,724	100%	9,718	100%	10,319	100%
Census Pop Ages 15+	8,727	100%	9,718	100%	10,319	100%

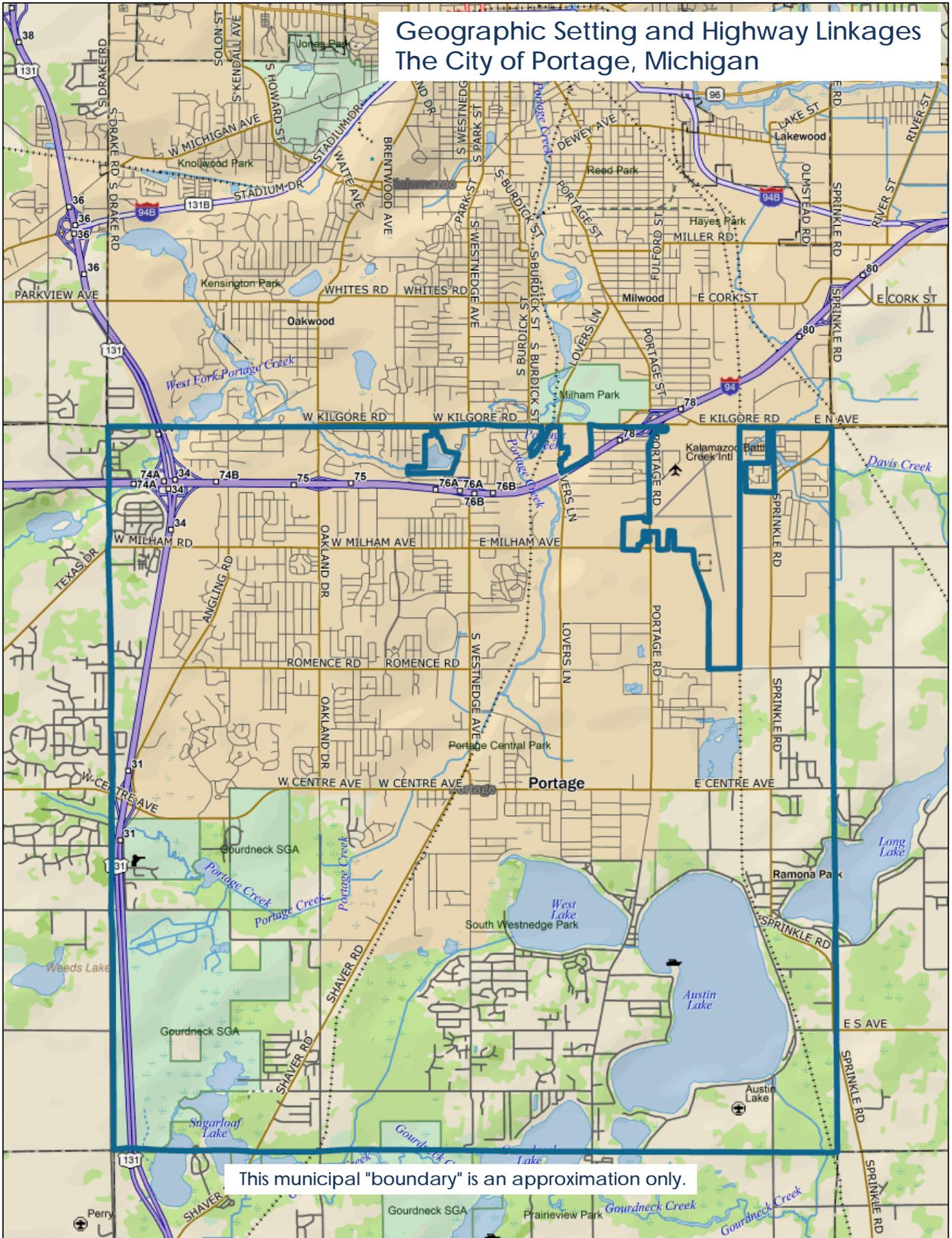
Source: Underlying data provided by the 2000 and 2010 Decennial Census with 2019 Estimates provided by Experian Decision Analytics. Exhibit and analysis prepared by LandUseUSA | Urban Strategies on behalf of the City of Portage, Michigan; March 2020.

Retail Market Parameters | Age, Income, Marital Status 5-Mile Radius and 15-Minute Drive Time | Lake Center District

	2000	2000	2010	2010	2019	2019
Population by Age	Census	Share	Census	Share	Estimates	Share
0 to 4	4,056	6.7%	4,187	6.7%	4,253	6.4%
5 to 14	8,925	14.8%	8,565	13.7%	8,576	13.0%
15 to 19	3,926	6.5%	4,047	6.5%	3,904	5.9%
20 to 24	3,854	6.4%	3,748	6.0%	4,449	6.7%
25 to 34	8,393	13.9%	8,554	13.6%	9,149	13.8%
35 to 44	9,856	16.4%	8,231	13.1%	8,385	12.7%
45 to 54	8,872	14.7%	9,307	14.8%	8,320	12.6%
55 to 64	5,250	8.7%	7,775	12.4%	8,470	12.8%
65 to 74	3,821	6.3%	4,407	7.0%	6,299	9.5%
75 to 84	2,458	4.1%	2,748	4.4%	2,940	4.5%
85+	768	1.3%	1,172	1.9%	1,316	2.0%
Total Population (sum)	60,178	100%	62,741	100%	66,061	100%
Median Age	36	.	38	.	38	.
Per Capita Income	\$24,195	.	\$27,897	.	\$35,010	.
	2000	2000	2010	2010	2019	2019
Marital Status Ages 15+	Census	Share	Census	Share	Estimates	Share
Married, Spouse Present	26,543	56%	25,568	51%	27,469	52%
Married, Spouse Absent	1,078	2%	1,163	2%	1,277	2%
Divorced	4,879	10%	5,554	11%	6,135	12%
Widowed	2,839	6%	2,841	6%	2,590	5%
Never Married	11,826	25%	14,863	30%	15,762	30%
Total Pop Ages 15+ (sum)	47,165	100%	49,989	100%	53,233	100%
Census Pop Ages 15+	47,198	100%	49,989	100%	53,233	100%

Source: Underlying data provided by the 2000 and 2010 Decennial Census with 2019 Estimates provided by Experian Decision Analytics. Exhibit and analysis prepared by LandUseUSA | Urban Strategies on behalf of the City of Portage, Michigan; March 2020.

Geographic Setting and Highway Linkages The City of Portage, Michigan



Underlying map provided by Delorme; exhibit prepared by LandUseUSA
Urban Strategies for the City of Portage; March, 2020.



1" = 1,270 ft

Population Market Parameters | Age, Income, Marital Status

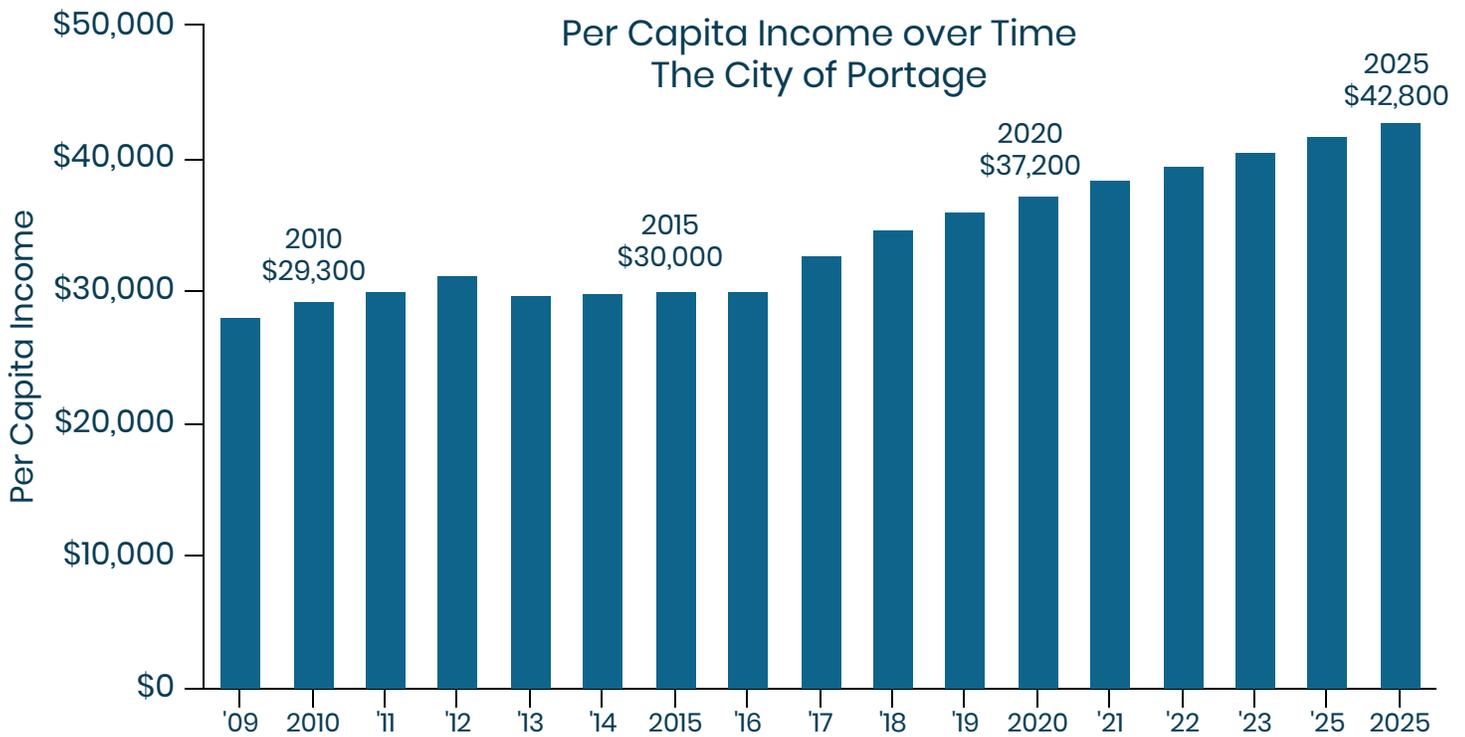
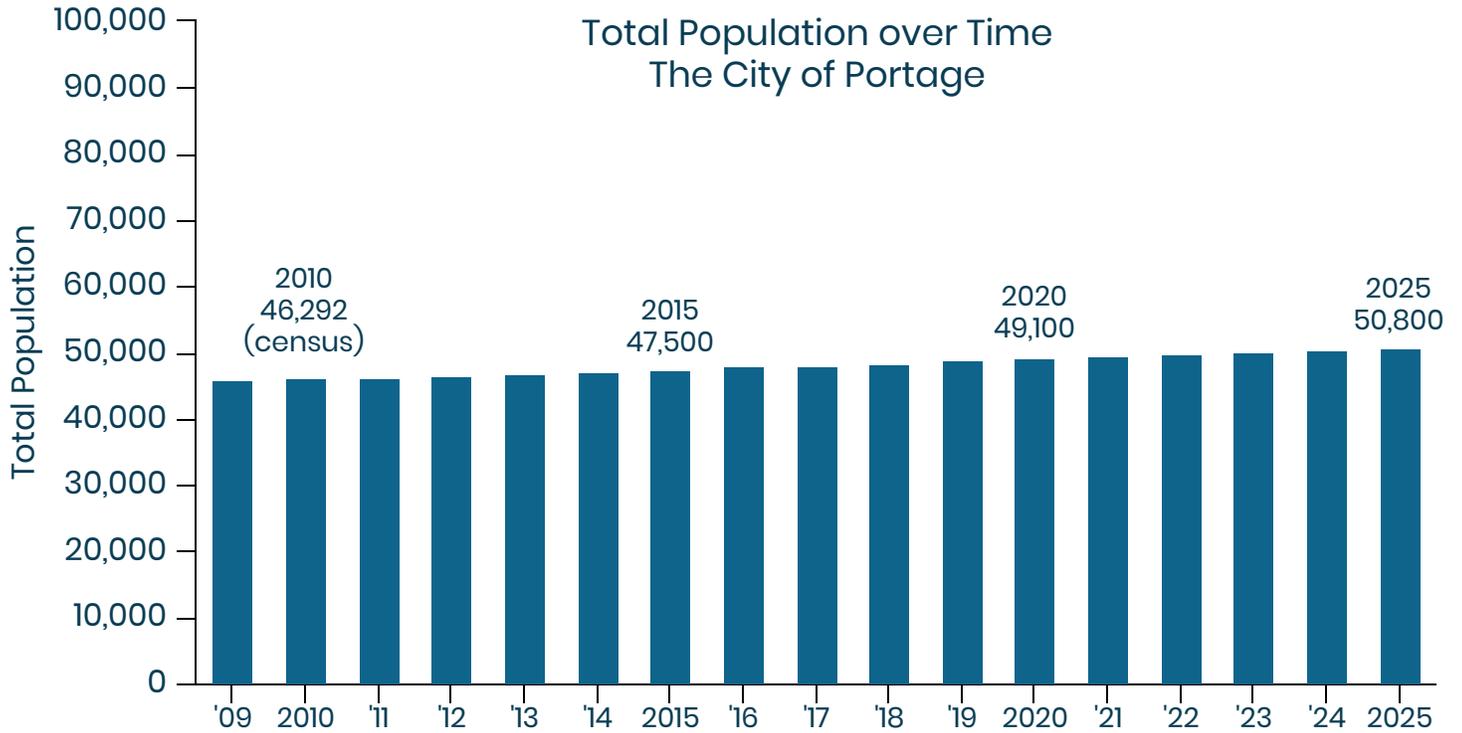
The City of Portage, Michigan

	2000	2000	2010	2010	2019	2019
Population by Age	Census	Share	Census	Share	Estimates	Share
0 to 4	3,080	7%	3,088	7%	3,089	6%
5 to 14	6,756	15%	6,416	14%	6,393	13%
15 to 19	2,848	6%	2,986	6%	2,927	6%
20 to 24	2,684	6%	2,653	6%	3,237	7%
25 to 34	6,202	14%	6,187	13%	6,594	14%
35 to 44	7,174	16%	6,180	13%	6,245	13%
45 to 54	6,560	15%	6,775	15%	6,126	13%
55 to 64	3,898	9%	5,697	12%	6,189	13%
65 to 74	2,867	6%	3,246	7%	4,701	10%
75 to 84	1,821	4%	2,150	5%	2,275	5%
85+	541	1%	907	2%	1,025	2%
Total Population (sum)	44,430	100%	46,284	100%	48,800	100%
Median Age	36	.	38	.	38	.
Per Capita Income	\$25,218	.	\$29,300	.	\$36,000	.
	2000	2000	2010	2010	2019	2019
Marital Status Ages 15+	Census	Share	Census	Share	Estimates	Share
Married, Spouse Present	19,971	58%	19,133	52%	20,364	52%
Married, Spouse Absent	747	2%	911	2%	1,031	3%
Divorced	3,381	10%	4,002	11%	4,365	11%
Widowed	2,119	6%	2,104	6%	2,000	5%
Never Married	8,388	24%	10,629	29%	11,460	29%
Total Pop Ages 15+ (sum)	34,606	100%	36,779	100%	39,220	100%
Census Pop Ages 15+	34,593	100%	36,780	100%	39,220	100%

Source: Underlying data provided by the 2000 and 2010 Decennial Census with 2019 Estimates provided by Experian Decision Analytics. Exhibit and analysis prepared by LandUseUSA | Urban Strategies on behalf of the City of Portage, Michigan; March 2020.

Population and Income | Portage

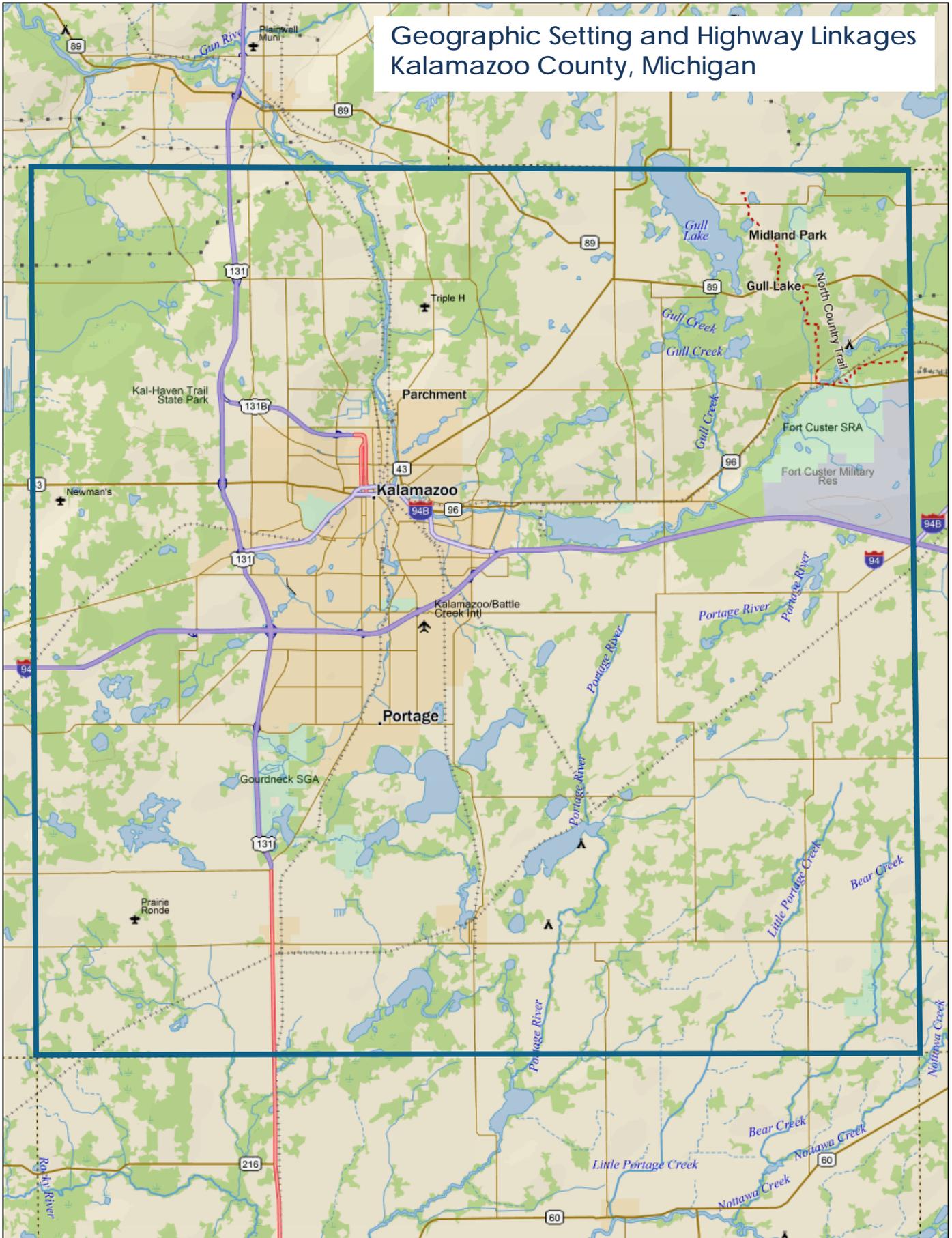
Population and per capita income are used to forecast retail expenditure potential.



Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2018. Analysis, forecasts, and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage; April 2020.



Geographic Setting and Highway Linkages Kalamazoo County, Michigan



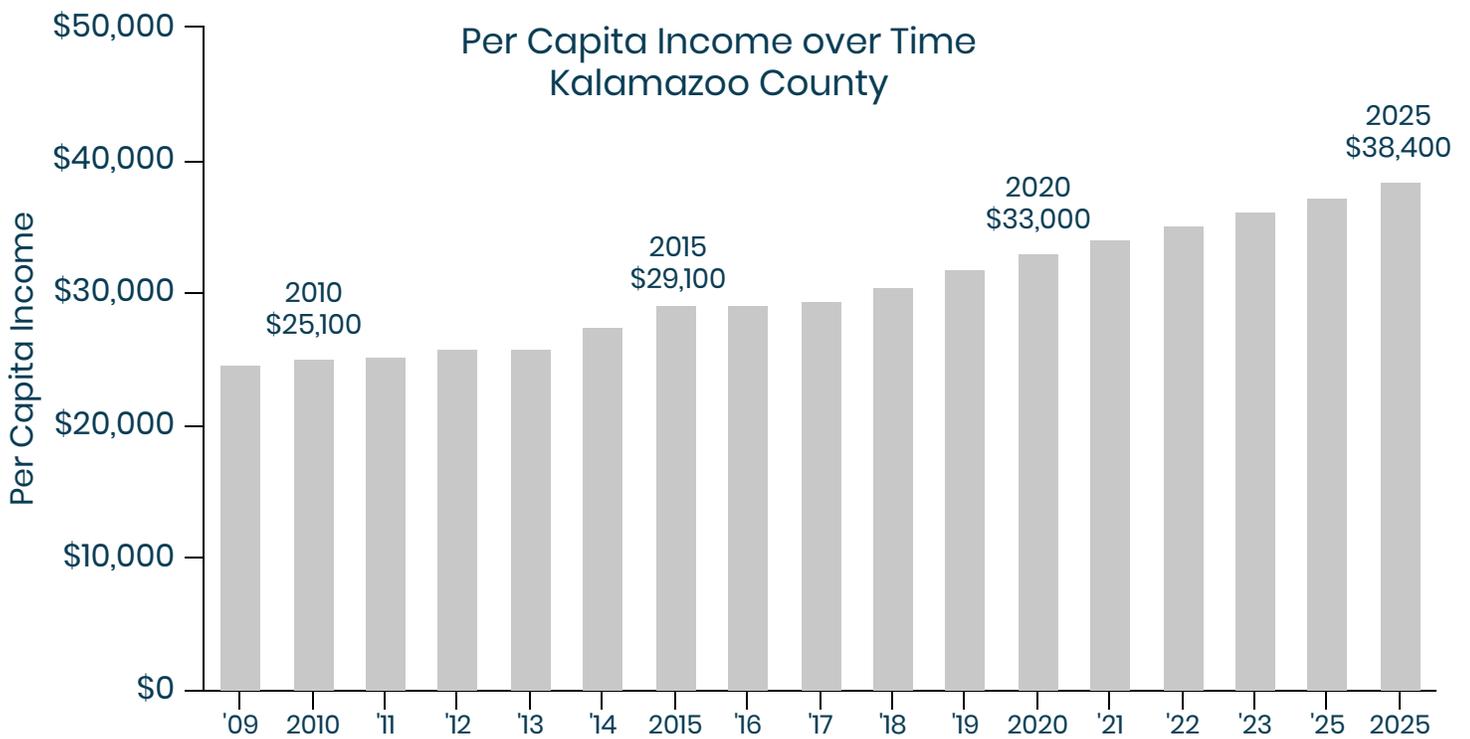
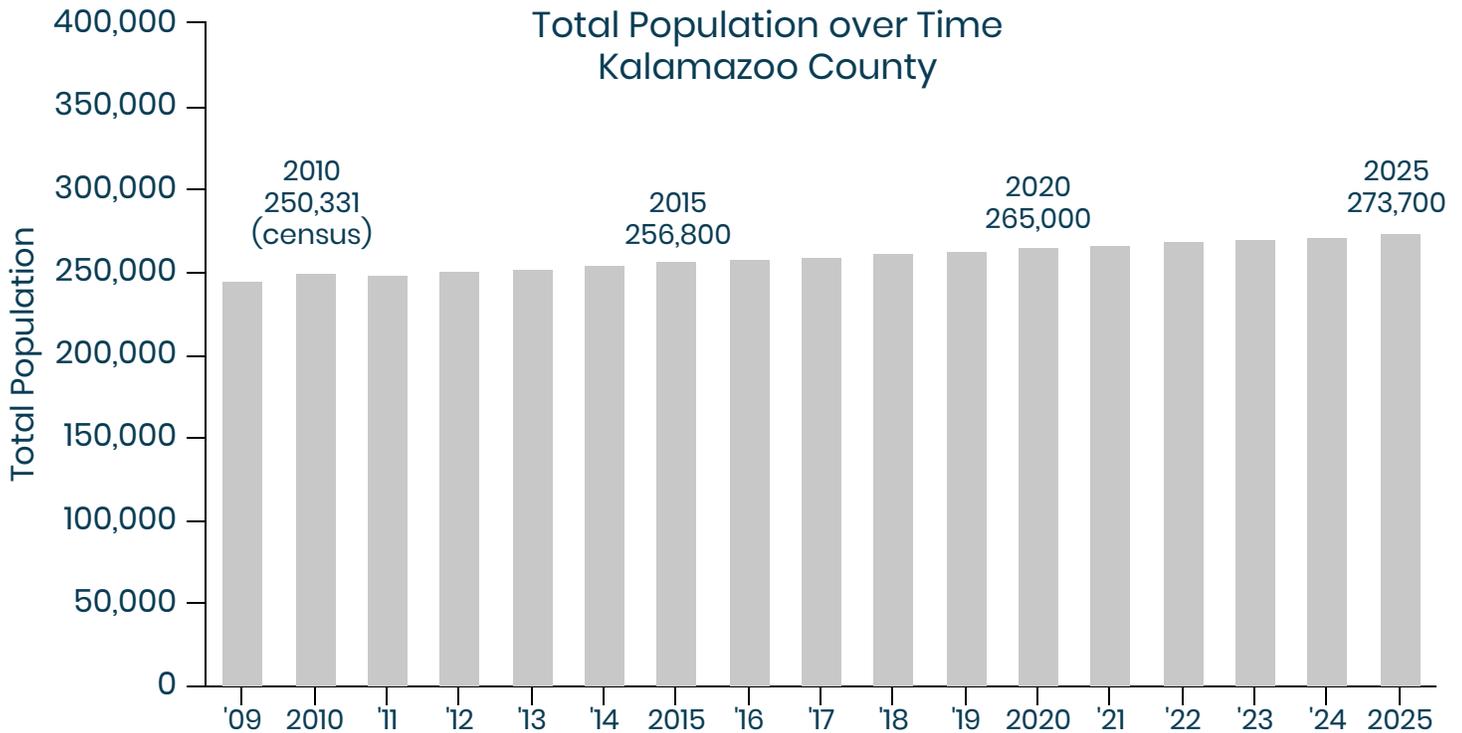
Underlying map provided by Delorme; exhibit prepared by LandUseUSA
Urban Strategies for the City of Portage; March, 2020.



1" = 4,155 ft

Population and Income | Kalamazoo Co

Population and per capita income are used to forecast retail expenditure potential.



Underlying data by the Decennial Census and American Community Survey (ACS) through the year 2018. Analysis, forecasts, and exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage; April 2020.



Population Market Parameters | Age, Income, Marital Status Kalamazoo County, Michigan

	2000	2000	2010	2010	2019	2019
Population by Age	Census	Share	Census	Share	Estimates	Share
0 to 4	15,373	6%	15,646	6%	15,882	6%
5 to 14	32,829	14%	31,607	13%	31,683	12%
15 to 19	19,880	8%	19,456	8%	18,558	7%
20 to 24	25,416	11%	27,752	11%	32,061	12%
25 to 34	32,432	14%	33,196	13%	35,506	13%
35 to 44	35,242	15%	29,588	12%	30,276	11%
45 to 54	31,440	13%	33,674	13%	29,765	11%
55 to 64	18,877	8%	28,632	11%	31,170	12%
65 to 74	14,158	6%	15,933	6%	22,374	8%
75 to 84	9,367	4%	10,052	4%	10,722	4%
85+	3,597	2%	4,795	2%	5,302	2%
Total Population (sum)	238,611	100%	250,331	100%	263,300	100%
Median Age	33	.	34	.	34	.
Per Capita Income	\$21,322	.	\$25,200	.	\$31,800	.
	2000	2000	2010	2010	2019	2019
Marital Status Ages 15+	Census	Share	Census	Share	Estimates	Share
Married, Spouse Present	90,980	48%	88,544	44%	93,256	44%
Married, Spouse Absent	9,399	5%	5,163	3%	6,346	3%
Divorced	18,728	10%	21,265	10%	23,706	11%
Widowed	10,504	6%	10,549	5%	10,413	5%
Never Married	60,755	32%	77,557	38%	80,451	38%
Total Pop Ages 15+ (sum)	190,366	100%	203,078	100%	214,172	100%
Census Pop Ages 15+	190,409	100%	203,078	100%	214,172	100%

Source: Underlying data provided by the 2000 and 2010 Decennial Census with 2019 Estimates provided by Experian Decision Analytics. Exhibit and analysis prepared by LandUseUSA | Urban Strategies on behalf of the City of Portage, Michigan; March 2020.

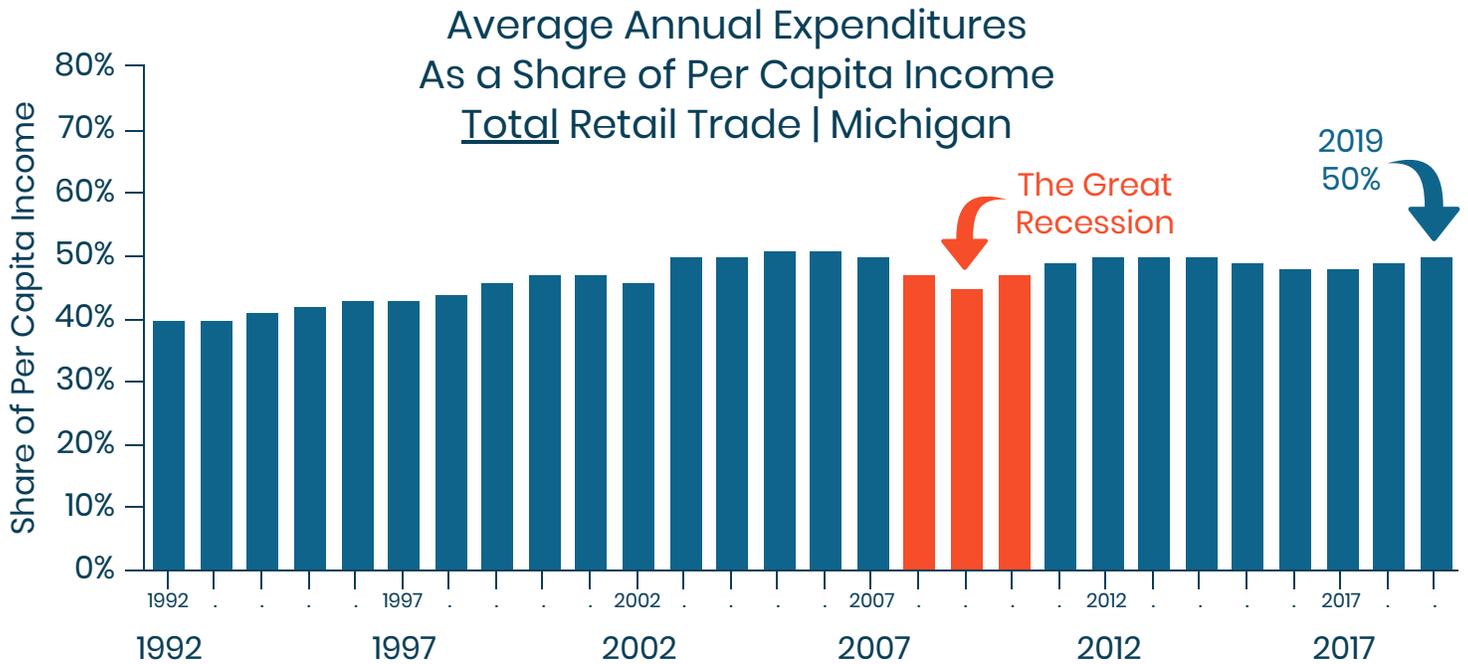
Section |
Retail Trends
Michigan and Nationwide



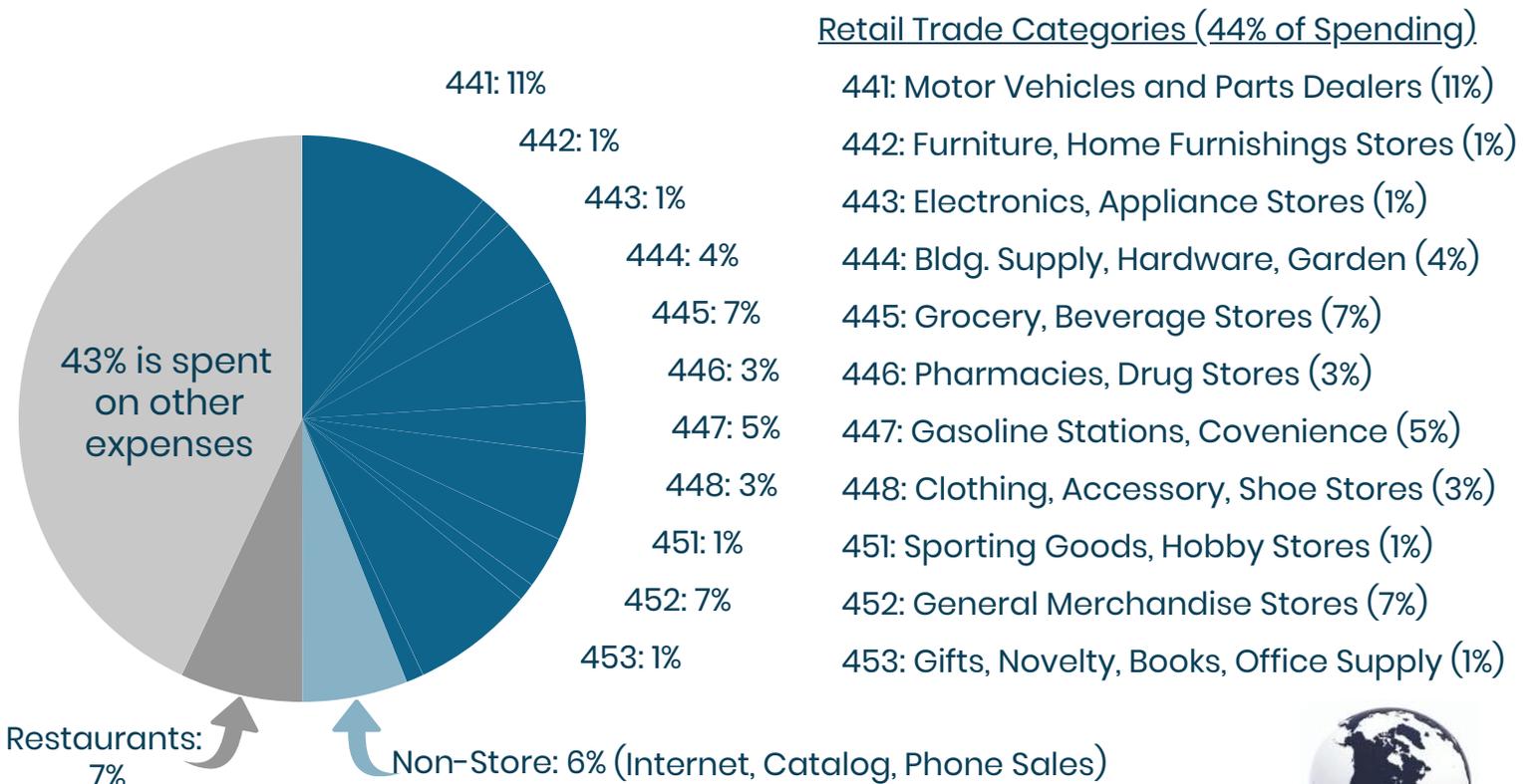
PORTAGE

A Great Place to Play

Retail Expenditures | Michigan



2019 Annual Expenditures As a Share of Per Capita Income by Retail Category | Michigan



Underlying data represents estimates only; analysis based on the U.S. Census Bureau's Advance Monthly Retail Trade Survey through 2018. Prepared by LandUseUSA | Urban Strategies © with full copyrights and all rights reserved.



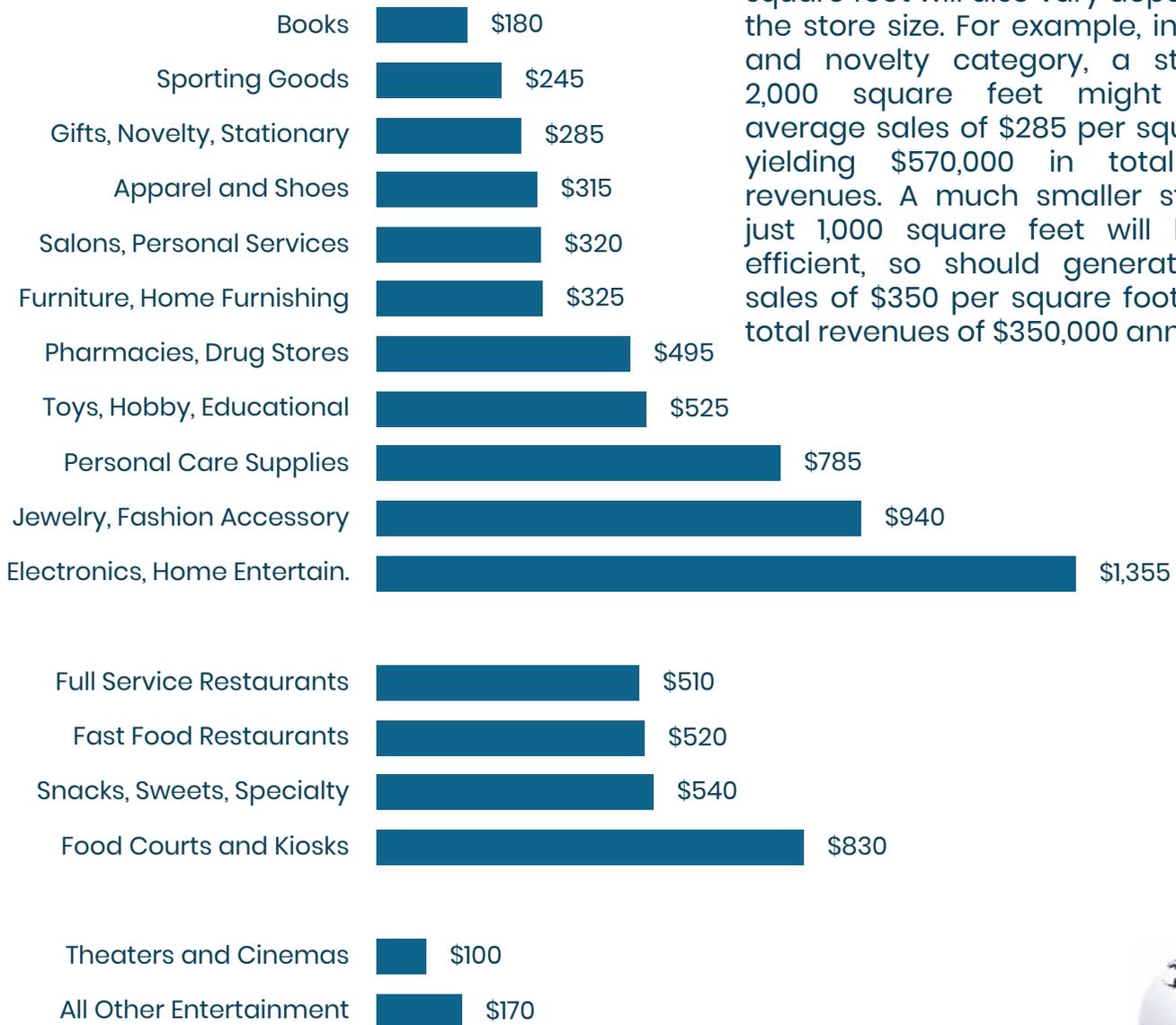
Retail Sales per Square Foot | Michigan

Demonstrates variations in sale productivity by retail category, forecast to 2020.

Average sales per square foot will vary by retail category, stores size, geographic location, visibility to vehicular traffic, resident and visitor incomes, and many related factors. This chart demonstrates the variations between retail categories, with averages for the State of Michigan and forecast to the year 2020.

Drug stores, pharmacies and personal care stores, jewelry, and electronics categories tend to have the high sales per square foot. In contrast, categories like gifts, novelty, apparel, salons, books, cinemas, and entertainment have lower sales per square foot. The average across the entire retail trade category is about \$350 per square foot.

Within each category, the sales per square foot will also vary depending on the store size. For example, in the gifts and novelty category, a store with 2,000 square feet might achieve average sales of \$285 per square foot, yielding \$570,000 in total annual revenues. A much smaller store with just 1,000 square feet will be more efficient, so should generate higher sales of \$350 per square foot, yielding total revenues of \$350,000 annually.



Underlying data provided by the International Council of Shopping Centers through year-end 2017. Analysis & exhibit prepared by LandUseUSA | Urban Strategies for the City of Portage; April 2020.

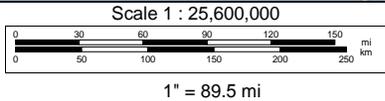


LandUseUSA
UrbanStrategies

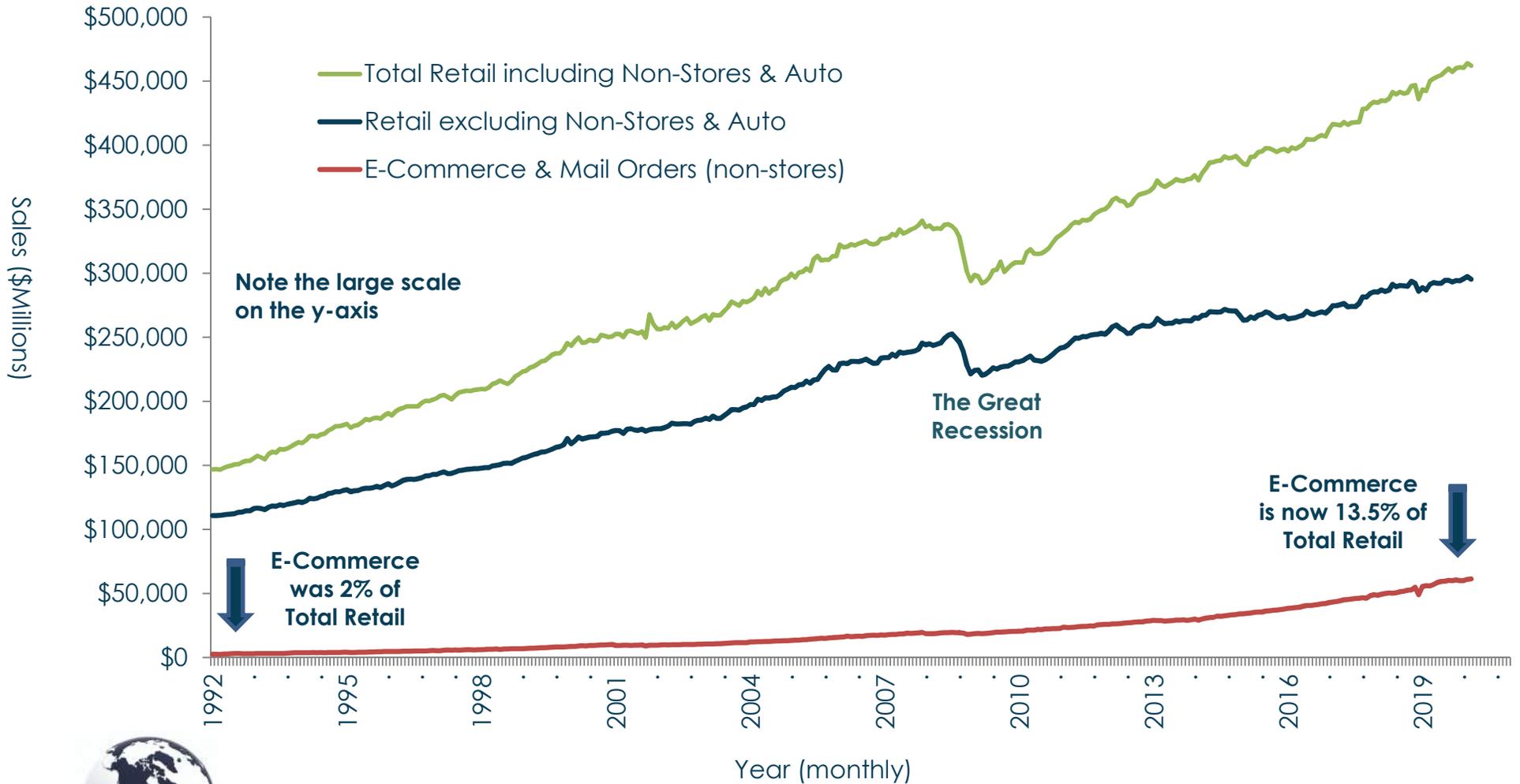
Geographic Setting and State Boundaries The United States of America



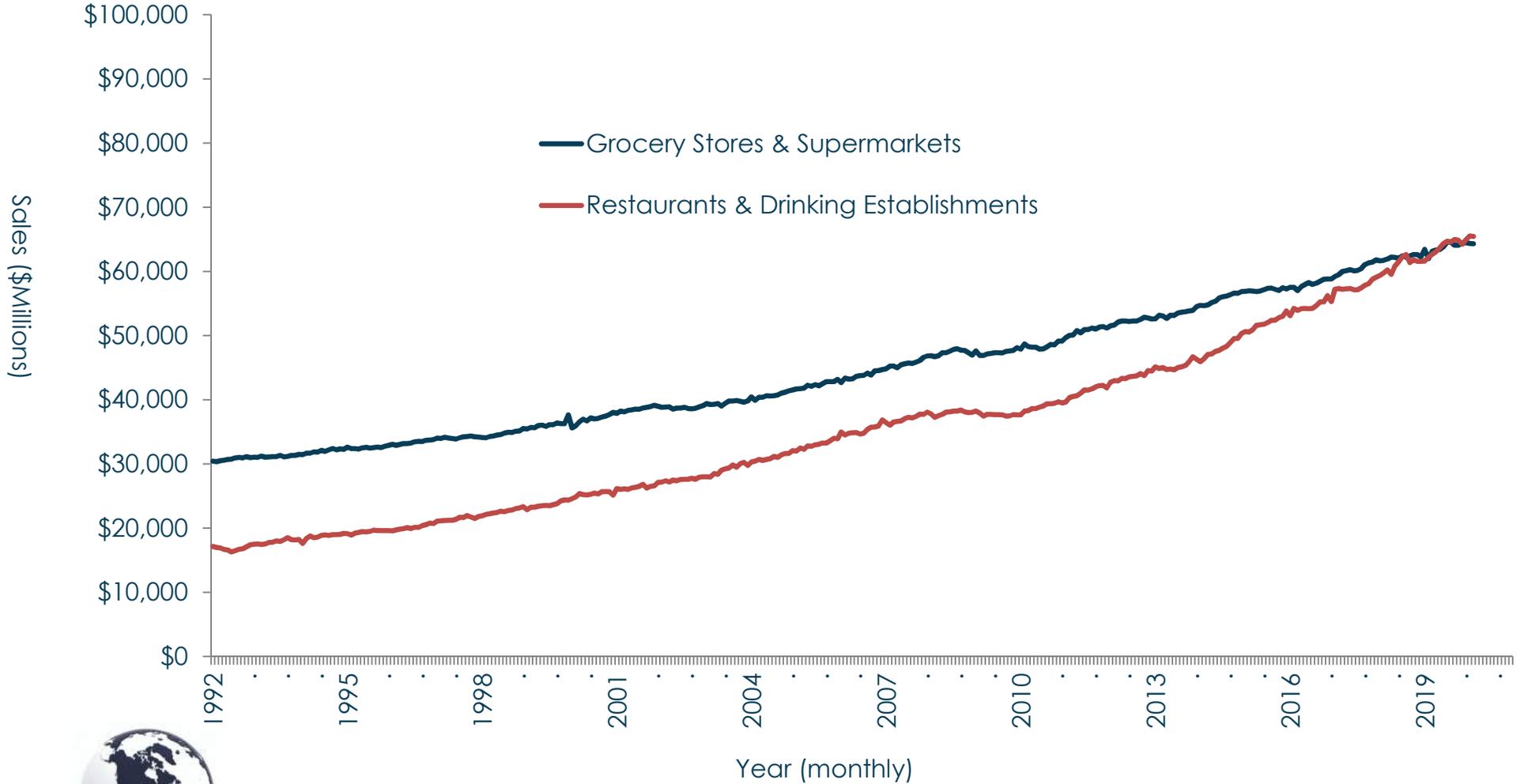
Underlying map provided by Delorme; exhibit prepared by LandUseUSA
Urban Strategies for the City of Portage; May, 2020.



Monthly Sales | Total Retail Trade v. E-Commerce The United States | 1992 - 2020 (p)



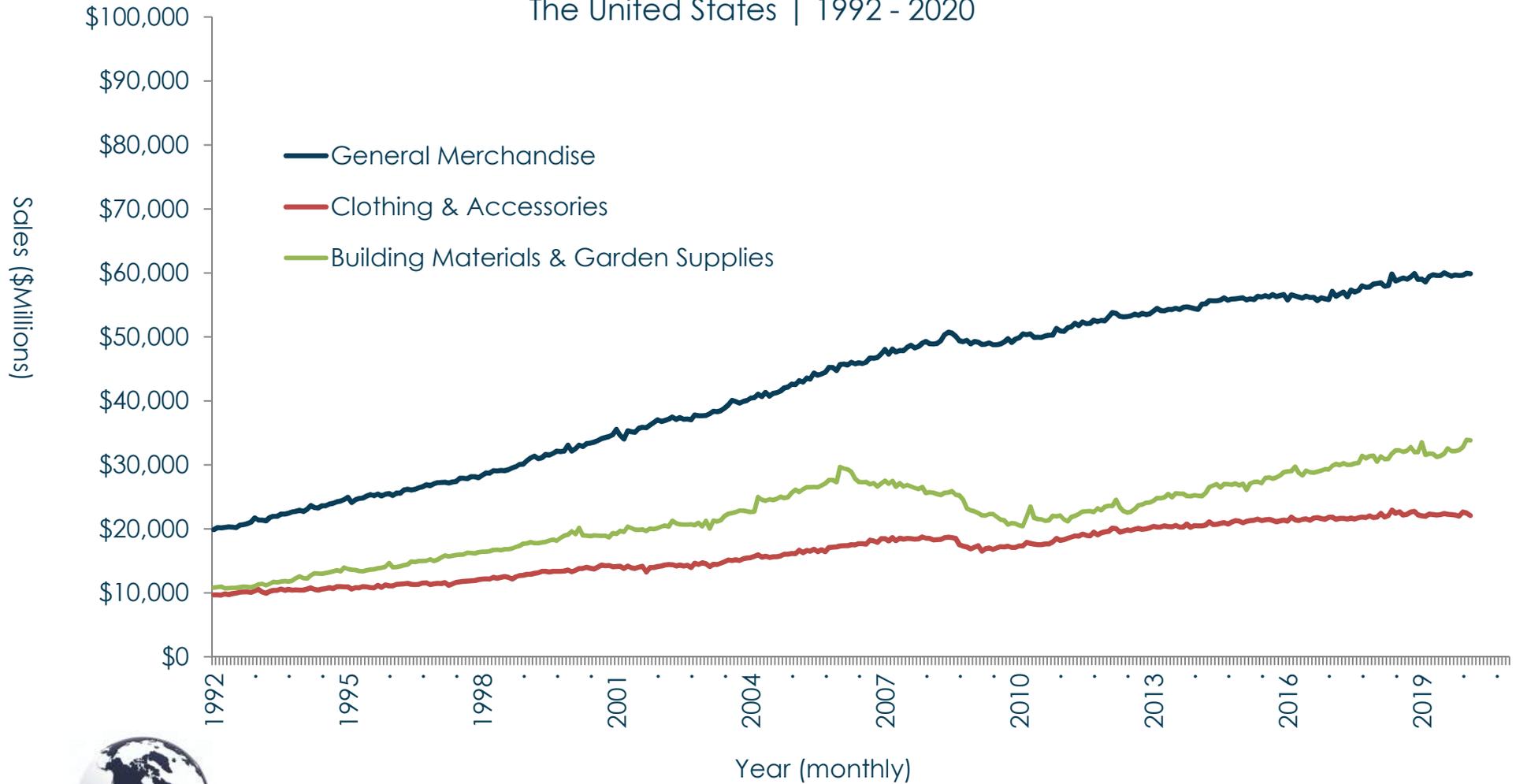
Monthly Sales | Grocery Stores v. Restaurants The United States | 1992 - 2020



LandUseUSA
UrbanStrategies

Source: United States Census of Monthly Retail Sales through February 2020. Analysis and exhibit prepared by LandUseUSA | Urban Strategies © 2020. Grocery stores and supermarkets include liquor stores.

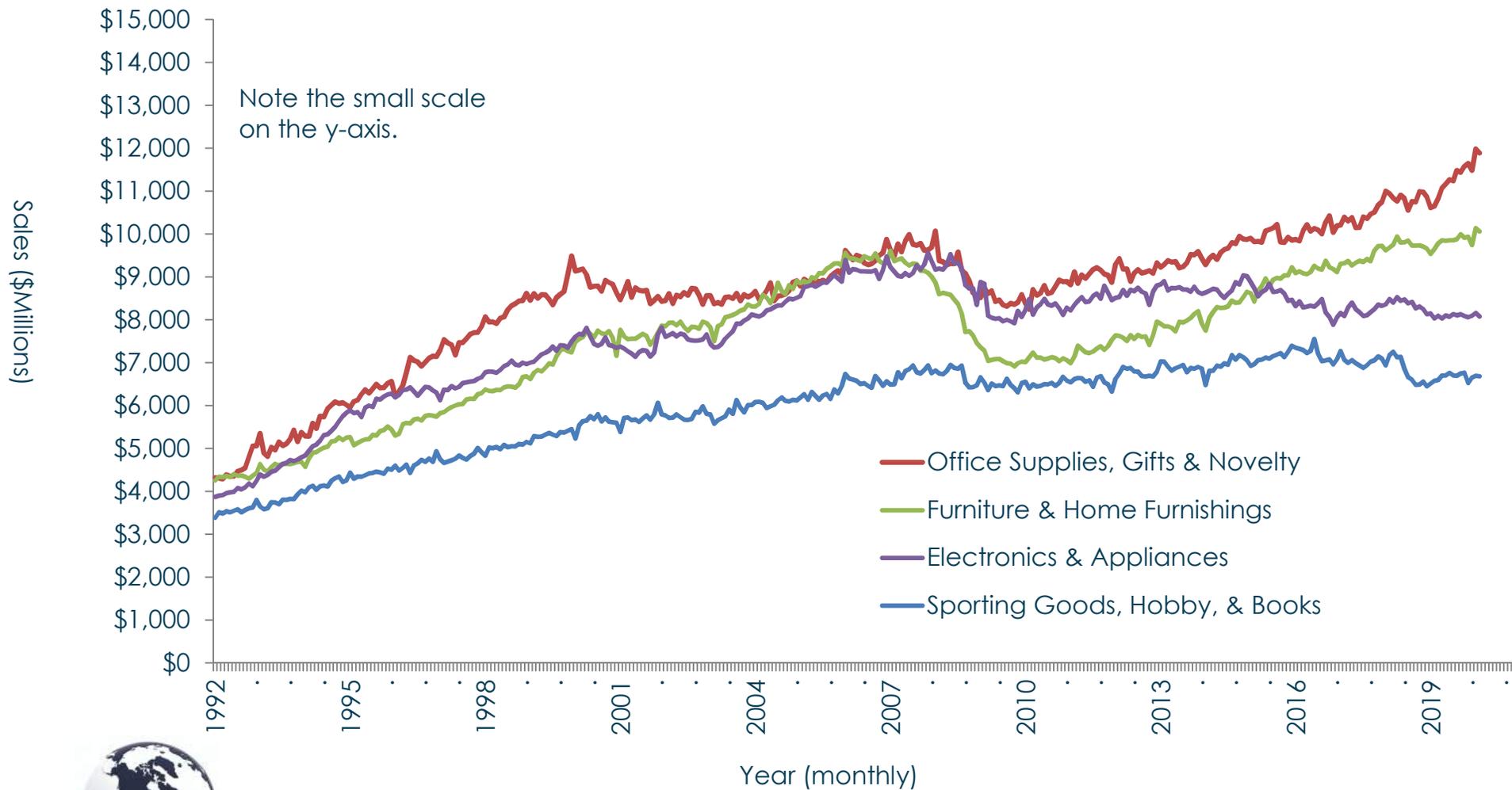
Monthly Sales | General Merchandise v. Clothing Building Materials & Garden Supplies The United States | 1992 - 2020



LandUseUSA
UrbanStrategies

Source: United States Census of Monthly Retail Sales through February 2020. Analysis and exhibit prepared by LandUseUSA | Urban Strategies © 2020. General Merchandise includes all department, discount, dollar, membership warehouse, and other stores.

Monthly Sales | Small Retail Categories The United States | 1992 - 2020



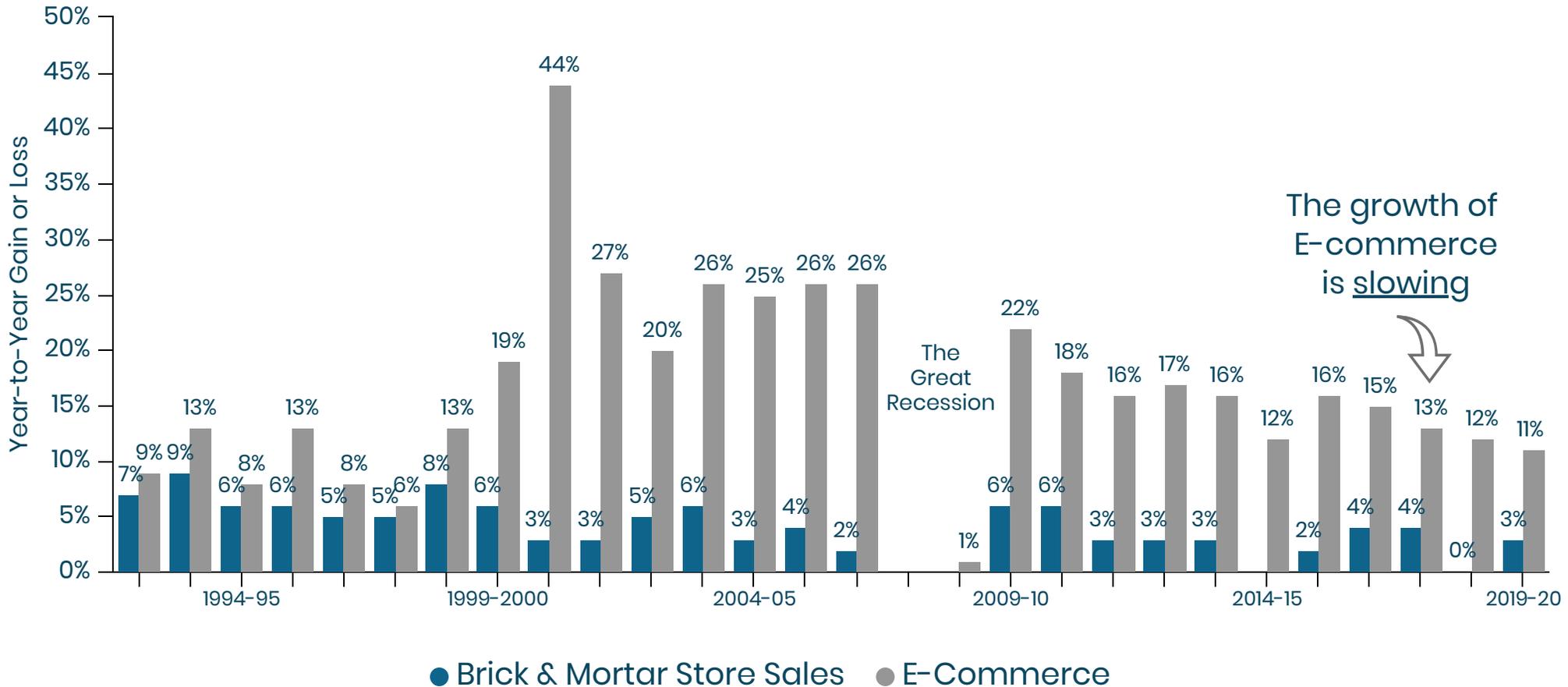
LandUseUSA
UrbanStrategies

Source: United States Census of Monthly Retail Sales through February 2020. Analysis and exhibit prepared by LandUseUSA | Urban Strategies © 2020. Office supplies, gifts & novelty stores include antique and other used merchandise stores.

Brick-and-Mortar Stores vs. E-Commerce

Year-to-Year Growth Rates

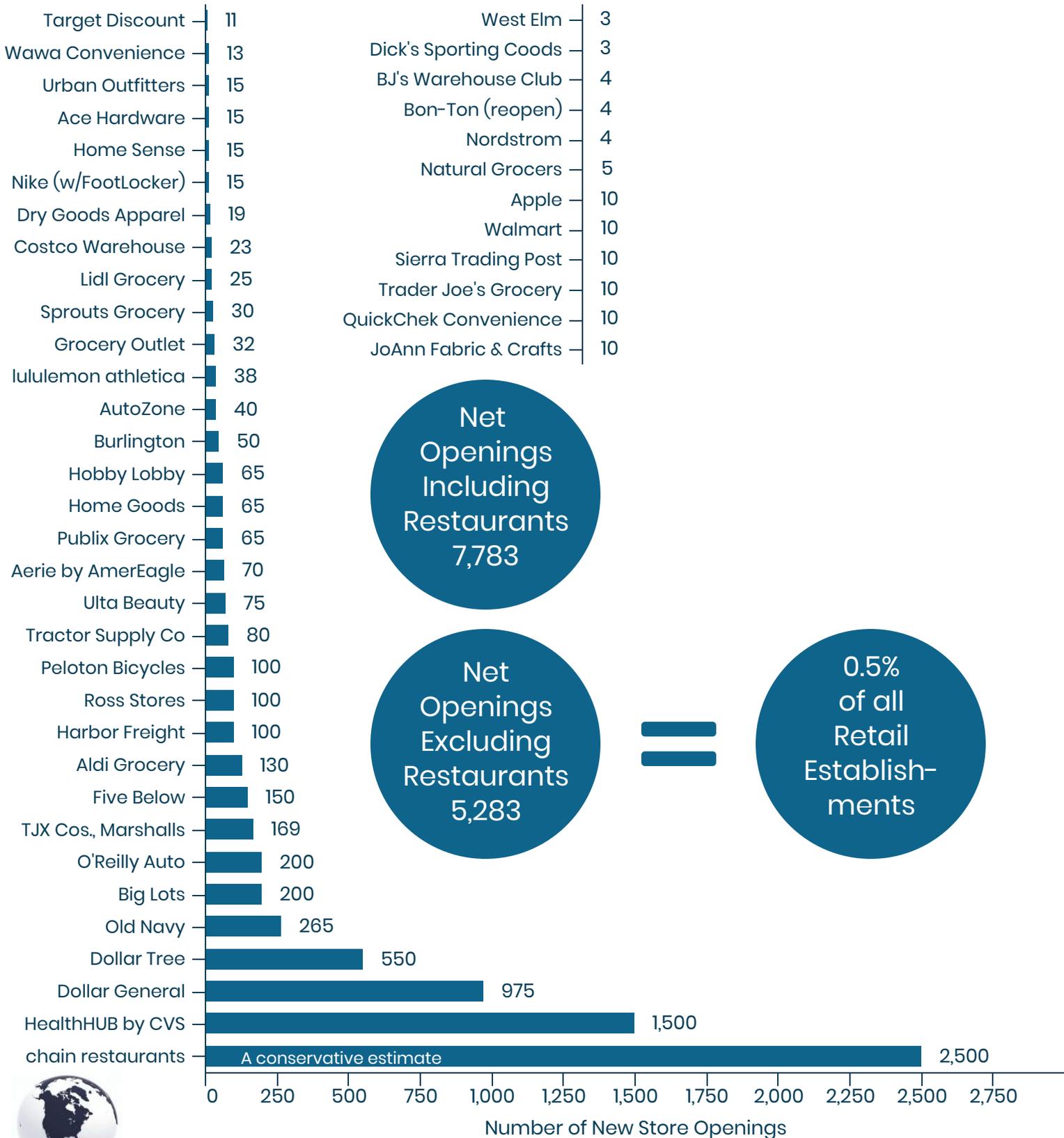
The United States | 1992 - 2020



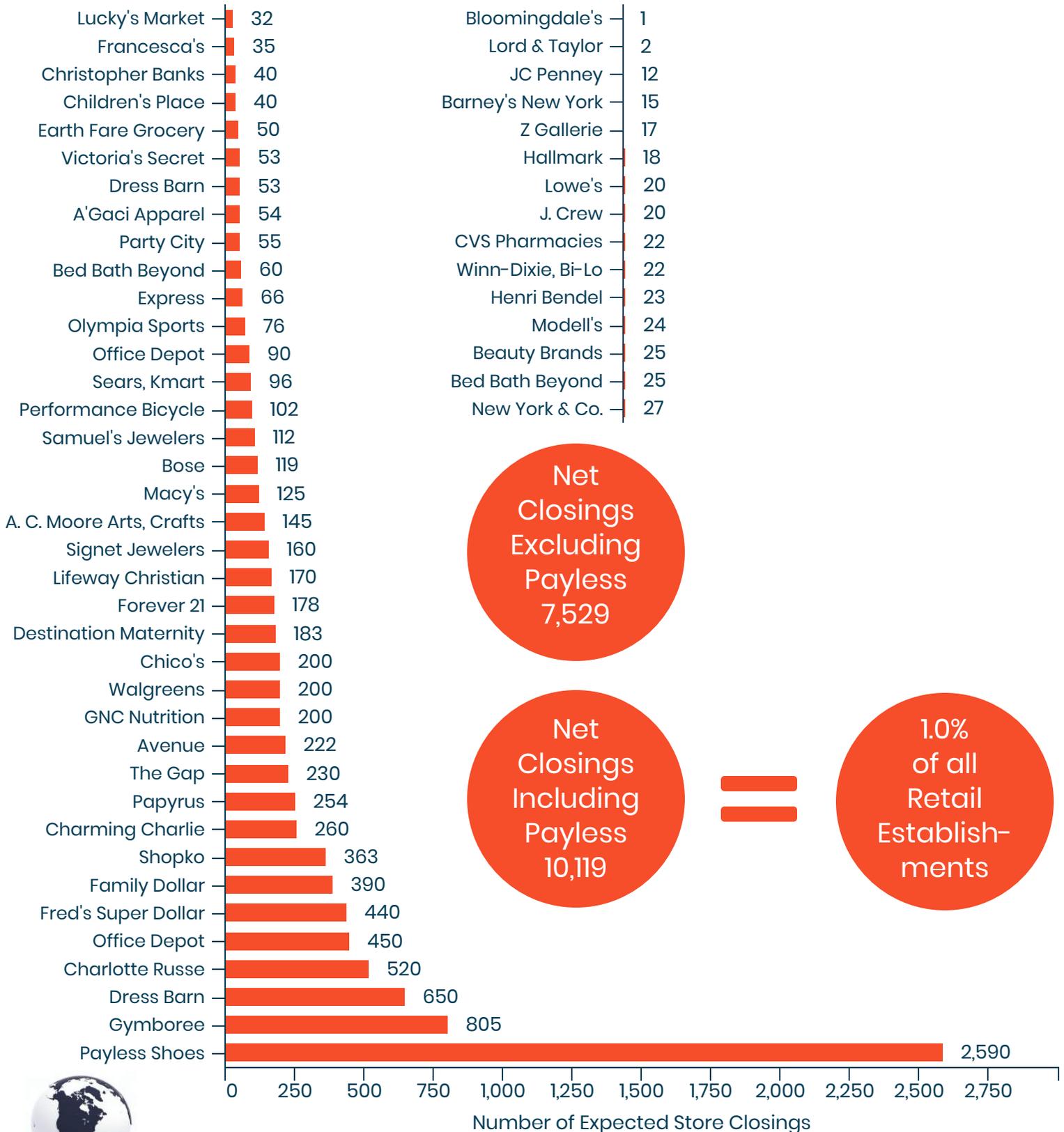
Analysis and exhibit prepared by LandUseUSA | Urban Strategies © with all rights reserved. Underlying data provided by the United States Census with interpolations, calculations, and forecasts provided by LandUseUSA. "E-Commerce" includes all electronic shopping, mail order houses (catalogs), and miscellaneous vendors; and includes e-commerce by both brick-and-mortar stores and by non-stores.



Net Store Openings | 45 Chains Nationwide | Annually 2019-2020



Net Store Closings | 52 Chains Nationwide | Annually 2019-2020



The Halo Effect of Omni Channels

Consumers are most loyal to brick & mortar stores with online and phone ordering & delivery, click & collect, and promotions through social media.

Single & Dual Channels



The Omni Channel



The
"Halo
Effect"



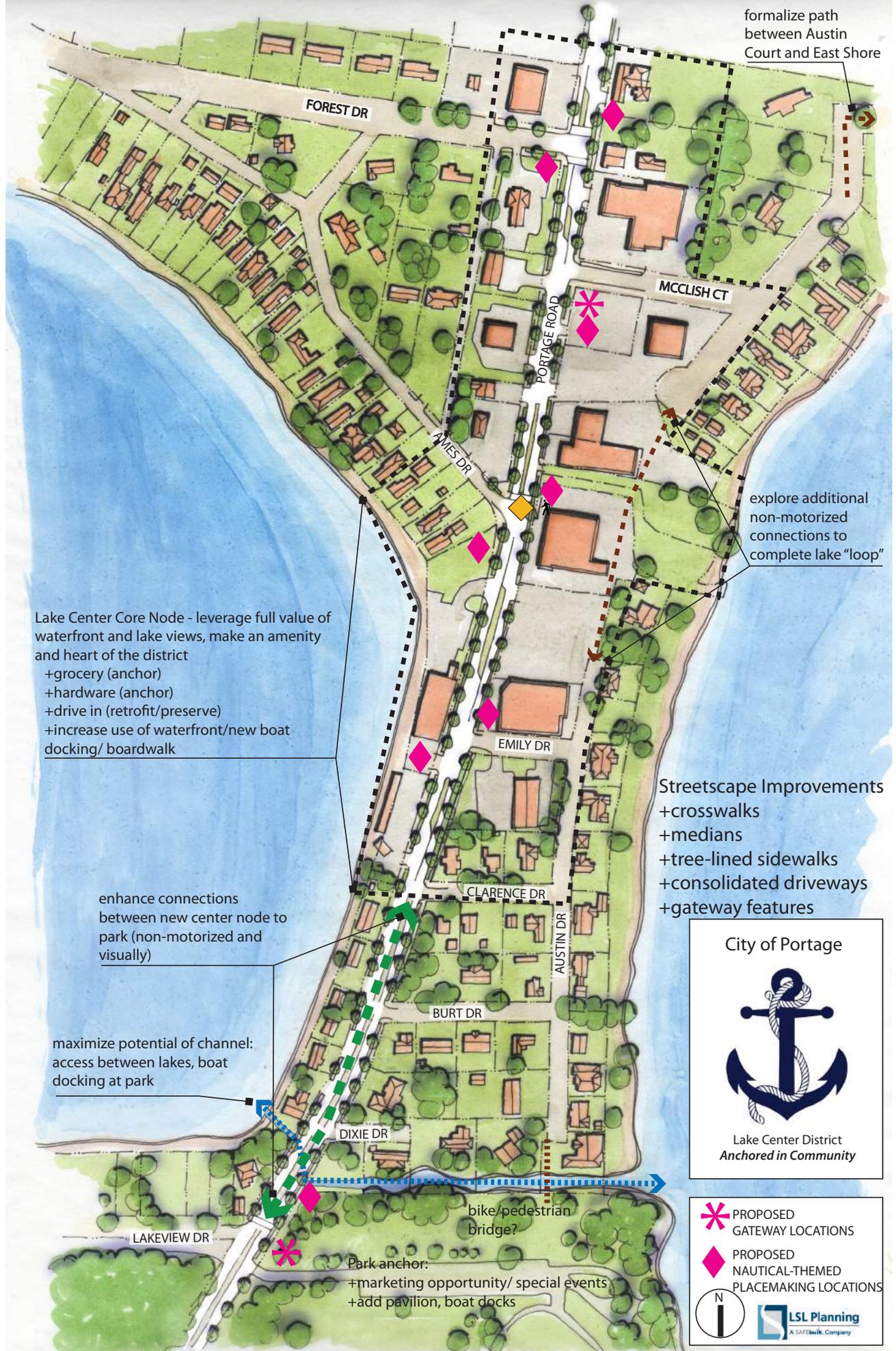
Section J

2014 Comprehensive Plan (Reference)



PORTAGE

A Great Place to Play



formalize path between Austin Court and East Shore

explore additional non-motorized connections to complete lake "loop"

Lake Center Core Node - leverage full value of waterfront and lake views, make an amenity and heart of the district
 +grocery (anchor)
 +hardware (anchor)
 +drive in (retrofit/preserve)
 +increase use of waterfront/new boat docking/ boardwalk

enhance connections between new center node to park (non-motorized and visually)

maximize potential of channel: access between lakes, boat docking at park

Streetscape Improvements
 +crosswalks
 +medians
 +tree-lined sidewalks
 +consolidated driveways
 +gateway features

City of Portage

Lake Center District
Anchored in Community

PROPOSED GATEWAY LOCATIONS

PROPOSED NAUTICAL-THEMED PLACEMAKING LOCATIONS

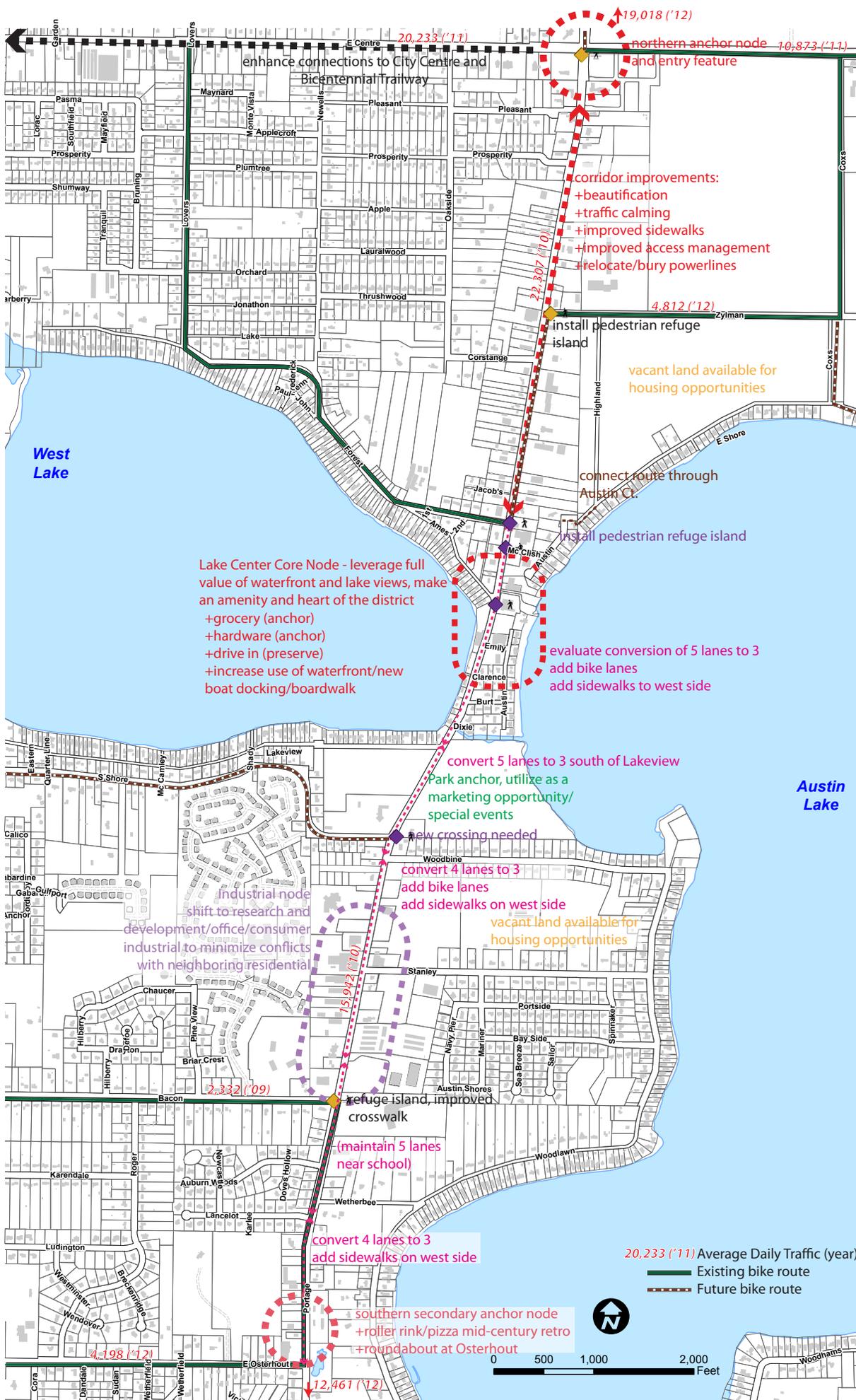
N

LSL Planning
 A SAFEbuilt Company

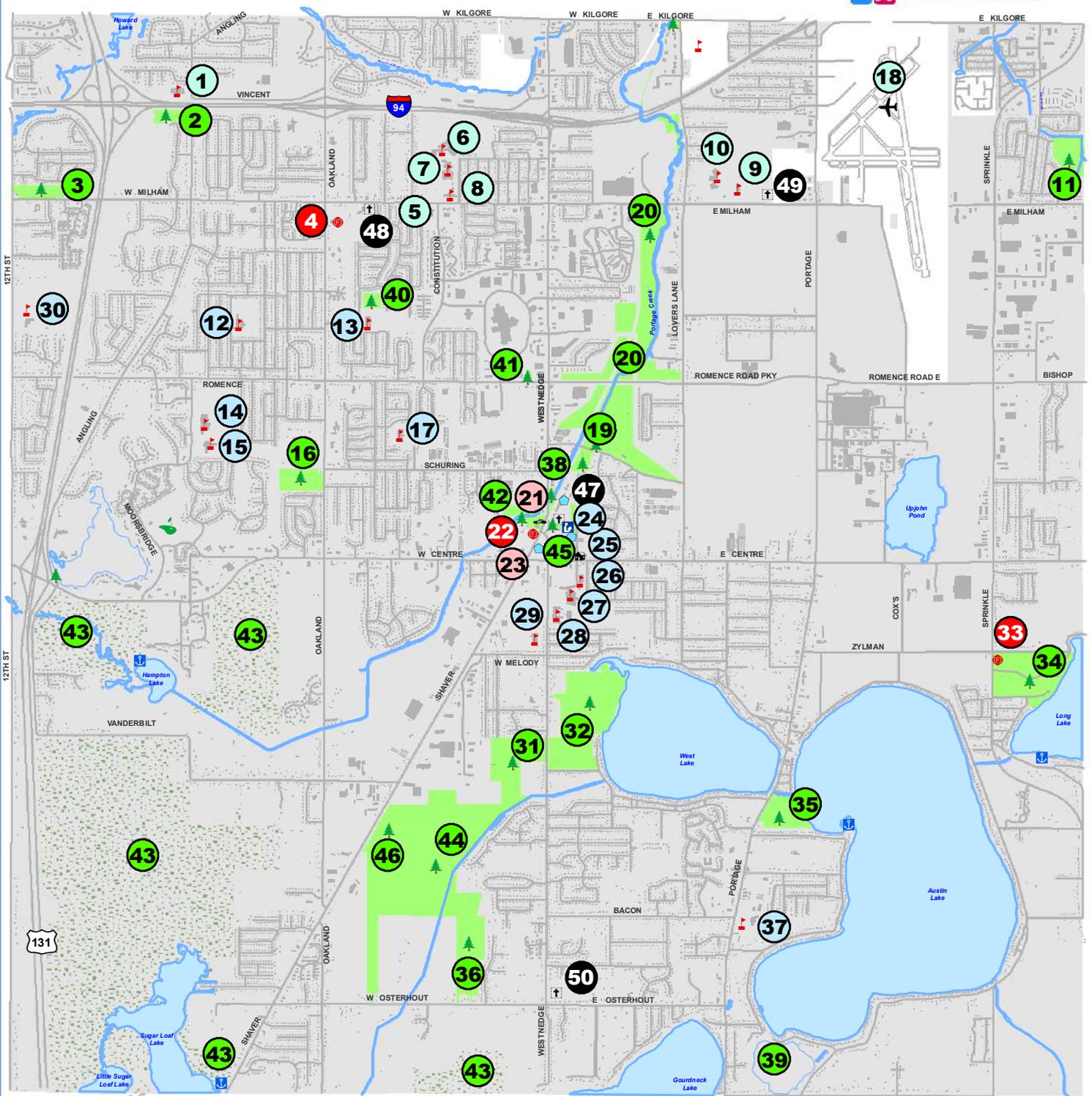
Park anchor:
 +marketing opportunity/ special events
 +add pavilion, boat docks

bike/pedestrian bridge?

Lake Center Corridor Recommendations; 2014.



Lake Center Corridor Recommendations; 2014.

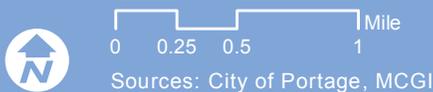


Community Facilities Map

March 2014

- Cemeteries
- Fire Stations
- Municipal Buildings
- Public/Institutional
- Recreation/State Game Area
- State Game Area Boundaries
- City Recreation Boundaries

- 1 Angling Road Elementary School
- 2 Harbors West Park
- 3 Westfield Park
- 4 Fire Station #2
- 5 Post Office
- 6 Portage Northern High School
- 7 Portage North Middle School
- 8 Portage Community Education Center
- 9 Kalamazoo Regional Education Service Agency (KRESA)
- 10 WoodsEdge Learning Center (KRESA)
- 11 Lexington Green Park
- 12 Amberly Elementary School
- 13 Haverhill Elementary School
- 14 Portage West Middle School
- 15 Moorsbridge Elementary School
- 16 Oakland Drive Park
- 17 Woodland Elementary School
- 18 Kalamazoo/Battle Creek International Airport
- 19 Celery Flats Interpretive Center
- 20 Portage Creek Bicentennial Park
- 21 Police Station
- 22 Fire Station #1
- 23 City Hall
- 24 Library
- 25 Senior Center
- 26 Portage School Administration
- 27 Portage Central High School
- 28 Portage Central Middle School
- 29 Portage Central Elementary School
- 30 12th Street Elementary School
- 31 South Westnedge Park
- 32 West Lake Nature Preserve
- 33 Fire Station #3
- 34 Ramona Park
- 35 Lakeview Park
- 36 Schrier Park
- 37 Lake Central Elementary School
- 38 Liberty Park
- 39 Mandigo Marsh
- 40 Haverhill Park
- 41 Millennium Park
- 42 Central Park/Bandshell
- 43 State Game Area
- 44 Bishops Bog
- 45 Veterans Memorial Park
- 46 Eliason Nature Reserve
- 47 Portage Central Cemetery
- 48 Day Prairie Cemetery
- 49 Indian Fields Cemetery
- 50 South Cemetery





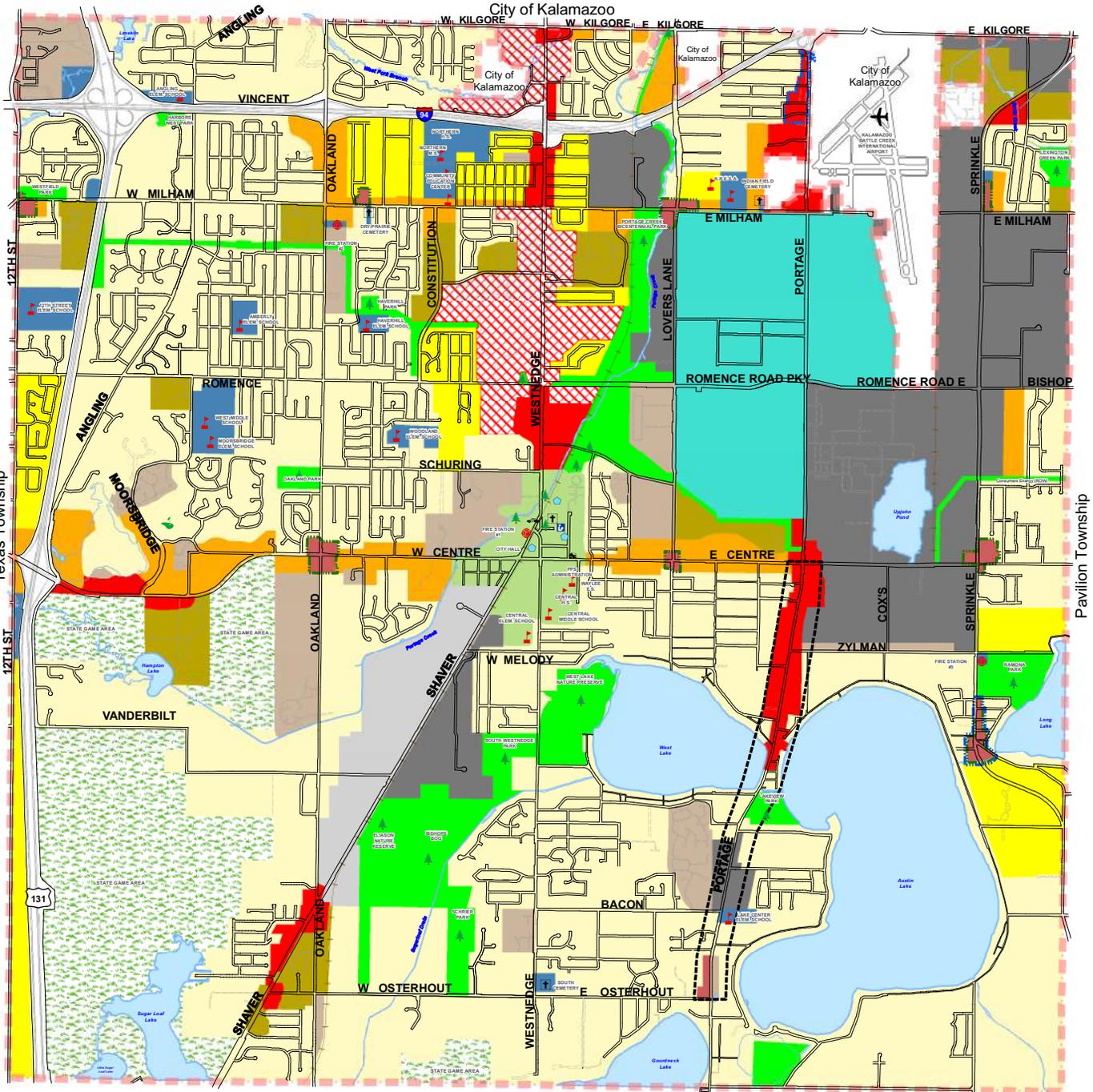
Future Land Use Map

Legend

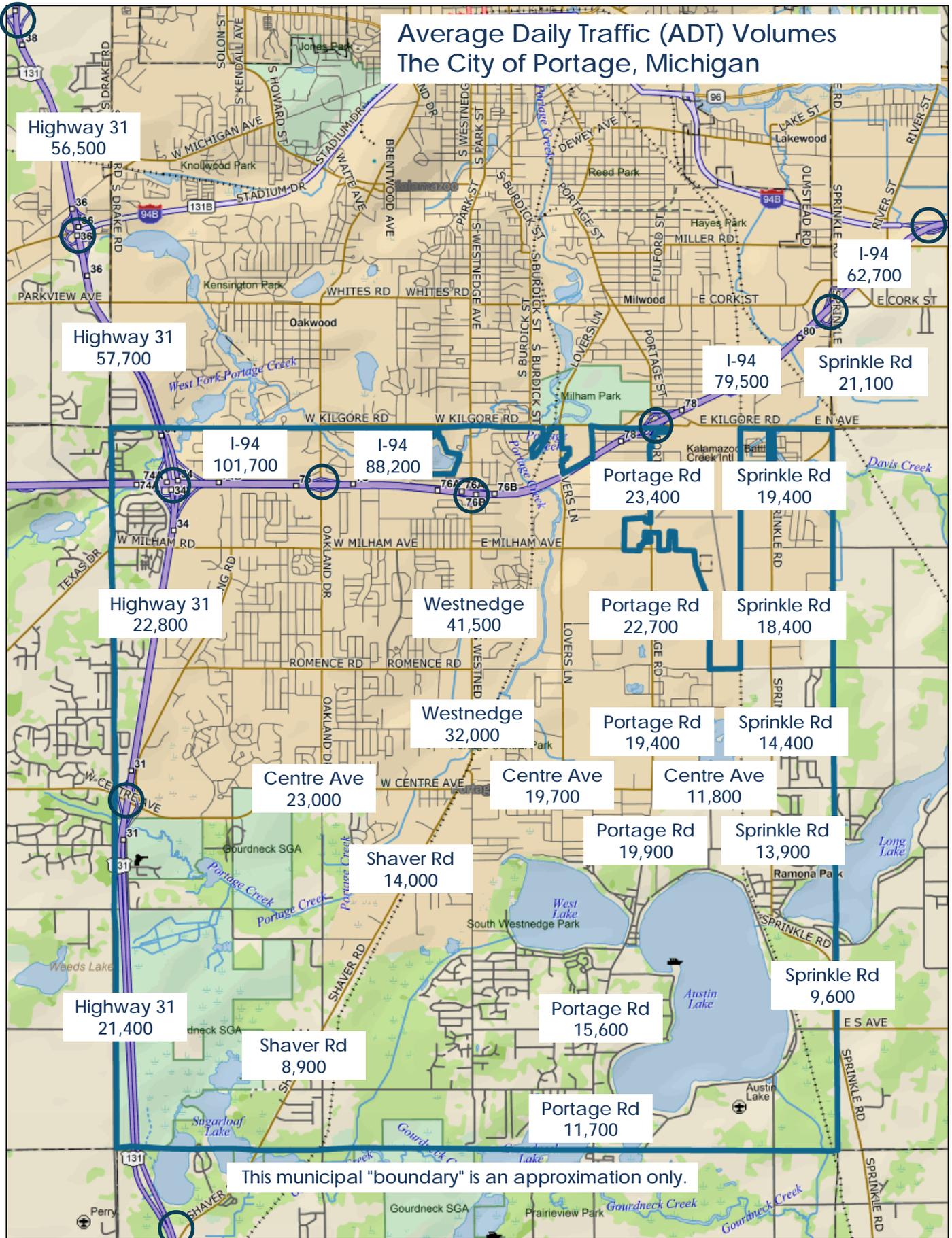
- Low Density Residential
- Single-Family Detached-Medium Density Residential
- Medium-Density Residential
- High Density Residential
- Local Business
- Regional Business
- General Business
- General Industrial
- Shaver Road Business Corridor
- Research, Development & Technology
- Office
- Park / Recreation
- Gourneck State Game Area
- Public
- City Centre
- Secondary Commercial Node
- Commercial Revitalization Area
- Lake Center Subarea
- Airport
- Cemetery
- City Park
- Court
- Fire Station
- Golf Course
- Library
- Municipal
- P.C.O.C.
- Police
- Public School
- CITY BOUNDARY



1 inch = 3,200 feet



Average Daily Traffic (ADT) Volumes The City of Portage, Michigan



Underlying map provided by Delorme; exhibit prepared by LandUseUSA Urban Strategies for the City of Portage; March, 2020. Average Daily Traffic (ADT) along highways are 2018 volumes provided by the Michigan Department of Transportation (MDOT). Circles indicate the highway interchanges. Local volumes are for 2019 and provided by the Kalamazoo Transportation Study (KATS).