# Target Market Analysis

## Alpena County
## Michigan

## 2016

**Prepared by:**

LandUseUSA

MSHDA
MICHIGAN STATE HOUSING
DEVELOPMENT AUTHORITY

# Acknowledgements

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# Executive Summary

Through a collaborative effort among public and private stakeholders, and with funding assistance from the Michigan State Housing Development Authority (MSHDA), LandUse|USA has been engaged to conduct this Residential Target Market Analysis (TMA) for the Northeast Michigan Prosperity Region 3, including Alpena County and 10 other counties.

This study has involved rigorous data analysis and modeling, and is based on in-migration into the City of Alpena and the Ossineke CDP. It is also based on internal migration within those places, movership rates by tenure and lifestyle cluster, and housing preferences among target market households. This Executive Summary highlights the results and is followed by a more complete explanation of the market potential under conservative (minimum) and aggressive (maximum) scenarios.

Based on the Target Market Analysis results, there is an annual market potential for 715 attached units throughout Alpena County, plus 670 detached houses. Among the 715 attached units, about two-thirds of the market potential can be captured by the City of Alpena (or 439 units), and Ossineke could capture about 19 units annually.

Summary Table
Annual Market Potential – Attached and Detached Units
Renters and Owners – Aggressive (Maximum) Scenario
Alpena County, Michigan – 2016

| Annual Market Potential Aggressive Scenario | Detached Houses | Attached Formats |
|---|---|---|
| The City of Alpena | 470 | 439 |
| The Ossineke CDP | 18 | 19 |
| Other Areas | 182 | 257 |
| Alpena County Total | 670 | 715 |

There will be 257 migrating households in Alpena County each year seeking attached houses in locations other than the City of Alpena or Ossineke CDP. Instead, they are more likely to choose townhouses along the Lake Huron shoreline, near the county's inland lakes, and along important highway connectors (particularly the US Highway 23 Heritage Route).

Each county and community in the region is unique with varying degrees of market potential across a range of formats. Results of the analysis are intended to help communities and developers focus on Missing Middle Housing choices (see www.MissingMiddleHousing.com for building typologies), which include triplexes and fourplexes, townhouses and row houses, and other multiplexes like courtyard apartments, and flats/lofts above street-front retail.  Depending on the unique attributes and size of each community, a variety of strategies can be used:

> Missing Middle Housing Formats – Recommended Strategies
> 1. Conversion of high-quality, vacant buildings (such as schools, city halls, hospitals, hotels, theaters, and/or warehouses) into new flats and lofts.
> 2. New-builds among townhouses and row houses, particularly in infill locations near lakes (including inland lakes) to leverage waterfront amenities.
> 3. Rehab of upper level space above street-front retail within downtown districts.
> 4. New-builds with flats and lofts in mixed-use projects, above new merchant space with frontage along main street corridors.
> 5. New-builds among detached houses arranged around cottage courtyards, and within established residential neighborhoods.
> 6. The addition of accessory dwelling units on existing residential properties.

Consistent with these objectives, target market households have been identified based on a) their propensity to choose urban settings over suburban or rural places, and b) propensity to choose attached building formats rather than detached houses. Within any group of households sharing similar lifestyles, there are variances in their preferences across building formats. For example, 52% of the "Bohemian Grooves" households, but only 11% of the "Digital Dependent" households are inclined to choose attached housing formats. Both groups are among the top target markets the State of Michigan and its Northeast Region.

In general, moderate-income renters tend to have higher movership rates, are more likely to live in compact urban places, and are more likely to choose attached units. However, there are many exceptions and better-income households and owners are also showing renewed interest in attached products. Across the nation, single householders now represent the majority (albeit by a narrow margin). Households comprised of unrelated members, and multi-generational households are also gaining shares. These diverse householders span all ages, incomes, and tenures; and many are seeking urban alternatives to detached houses.

As shown in the following summary table, the aggregate market potential for Alpena County exceeds that of any other county in the Northwest Michigan Prosperity Region 3. About 59 units (8%) of its annual market potential will be supported by the Upscale Target Markets, which is a relatively low share compared to other counties in the region. In addition, 597 units (84%) will be generated by the Moderate Target Markets, which is high for the region. Finally, the balance of 59 units (8%) will be generated by other households that are more prevalent in the market. This latter group is less inclined to choose attached formats and are more likely to make compromises by choosing detached houses.

Summary Table
Annual Market Potential – Attached Units Only
Renters and Owners – Aggressive Scenario
Northeast Michigan Prosperity Region 3 – 2016

| Renters and Owners Aggressive Scenario Attached Units Only | Upscale Target Markets | Moderate Target Markets | Most Prevalent Clusters | All 71 Lifestyle Clusters |
|---|---|---|---|---|
| Alpena County | 59 | 597 | 59 | 715 |
| Share of County Total | 8% | 84% | 8% | 100% |
| Others in the Region | | | | |
| Otsego County | 141 | 396 | 32 | 569 |
| Roscommon County | 30 | 287 | 100 | 417 |
| Cheboygan County | 76 | 264 | 38 | 378 |
| Ogemaw County | 47 | 181 | 51 | 279 |
| Iosco County | 43 | 178 | 49 | 270 |
| Crawford County | 24 | 130 | 34 | 188 |
| Presque Isle County | 20 | 110 | 22 | 152 |
| Oscoda County | 7 | 38 | 11 | 56 |
| Montmorency County | 5 | 24 | 9 | 38 |
| Alcona County | 5 | 13 | 20 | 38 |

There are a few interesting variations between other counties in the region. First, Otsego County is more likely than any other county to attract the Upscale Target Markets. Second, Roscommon County has relatively high movership rates among its most prevalent lifestyle clusters, and relatively low movership rates among the Upscale Target Markets. Details for each county in the region are provided in their respective Market Strategy Reports, independent from this document.

## Report Outline

This draft narrative accompanies the Market Strategy Report with results of a Residential Target Market Analysis (TMA) for Alpena County, Michigan. The outline and contents of this report are intentionally replicated for each of the 11 counties in the Northeast Michigan Prosperity Region 3. This leverages work economies, helps keep the reports succinct, and enables easy comparisons between counties in the region.

Results of the TMA and study are presented by lifestyle cluster and target markets (upscale and moderate), scenario (conservative and aggressive), tenure (renter and owner), building format (detached and missing middle housing), place (city and census designated place), price point (rent and value), and unit sizes (square feet). These topics are also shown in the following list and supported by attachments with tables and exhibits that detail the numerical and quantitative results:

| Variable | General Description |
|---|---|
| Target Markets | Upscale and Moderate |
| Lifestyle Clusters | 71 Total and Most Prevalent |
| Scenario | Conservative and Aggressive |
| Tenure | Renter and Owner Occupied |
| Building Sizes | Number of Units per Building |
| Building Formats | Missing Middle Housing, Attached and Detached |
| Geography | County, City, Census Designated Place (CDP) |
| Prices | Monthly Rents, Rent per Square Foot, Home Values |
| Unit Sizes | Square Feet and Number of Bedrooms |

The Regional Workbook (including the Methods Book) is more than a supporting and companion document to this Market Strategy Report. Rather, it is essential for an accurate interpretation of the target market analysis and results, and should be carefully reviewed by every reader and interested stakeholder.

This Market Strategy Report is designed to focus on data results from the target market analysis. It does not include detailed explanations of the analytic methodology and approach, determination of the target markets, derivation of migration and movership rates, Missing Middle Housing typologies, or related terminology. Each of these topics is fully explained in the Methods Book, which is part of the Regional Workbook.

This Market Strategy Report also includes a series of attached exhibits in <u>Section A</u> through <u>Section H</u>, and an outline is provided in the following <u>Table 1</u>.

<div align="center">

<u>Table 1</u>
TMA Market Strategy Report – Outline
Alpena County, Michigan – Prosperity Region 3
</div>

| The Market Strategy Report | | Geography |
|---|---|---|
| Narrative | Executive Summary | County and Places |
| Narrative | Technical Report | County and Places |
| Narrative | Market Assessment | County and Places |
| Section A | Investment Opportunities | Places |
| Section B | Summary Tables and Charts | County |
| Section C | Conservative Scenario | County |
| Section D | Aggressive Scenario | County |
| Section E | Aggressive Scenario | Places |
| Section $F_1$ | Contract Rents | County and Places |
| Section $F_2$ | Home Values | County and Places |
| Section G | Existing Households | County and Places |
| Section H | Market Assessment | County and Places |

Again, this report is accompanied by a Regional Workbook with additional narrative in a Methods Book. The Regional Workbook also includes the following: a) advisory report of recommended next-steps, b) target market profiles, and c) real estate analysis of existing housing choices, including forecasts for new-builds and rehabs. It is essential for stakeholders to review the Regional Workbook alongside this Market Strategy Report. An outline is provided in the following <u>Table 2</u>.

Table 2
TMA Regional Workbook – Outline
Alpena County, Michigan – Prosperity Region 3

The Regional Workbook

| | |
|---|---|
| Narrative | The Advisory Report |
| Narrative | The Methods Book |

Target Market Profiles

| | |
|---|---|
| Section J | Formats by Target Market |
| Section K | Building Typologies |
| Section L | Lifestyle Clusters |
| Section M | Narrative Descriptions |

Real Estate Analysis

| | |
|---|---|
| Section N | Renter Choices |
| Section O | Owner Choices |

## The Target Markets

To complete the market potential, 8 upscale and 8 moderate target markets were selected based on their propensity to a) live in Michigan, and b) choose attached housing formats in small and large urban places. Among the 16 target markets, those moving into and within Alpena County include the Bohemian Groove, Digital Dependents, and Family Trooper households (among others). Table 3 on the following page provides a succinct overview of the target market inclinations for attached units, renter tenure, and renter movership rate. Detailed profiles are included in Section B attached to this report and in the Regional Workbook.

Table 3
Upscale and Moderate Target Markets
Alpena County, Michigan – Year 2016

| Group | | Lifestyle Cluster Name | Share in Attached Units | Renters as a Share of Total | Renter Movership Rate |
|---|---|---|---|---|---|
| Upscale | K40 | Bohemian Groove | 52% | 91% | 38% |
| Upscale | O51 | Digital Dependents | 11% | 34% | 80% |
| Moderate | O55 | Family Troopers | 64% | 99% | 87% |
| Moderate | Q65 | Senior Discounts | 100% | 71% | 28% |
| Moderate | R66 | Dare to Dream | 37% | 98% | 58% |
| Moderate | S70 | Tight Money | 92% | 100% | 78% |
| Moderate | S71 | Tough Times | 86% | 95% | 41% |

Upscale Target Markets – Alpena County

K40     Bohemian Groove – Settled in second-tier cities and scattered across the country; living in affordable attached units, including low-rise courtyard apartments and row houses of varying vintage.  Head of householder's age: 48% are between the ages of 51 and 65.

O51     Digital Dependents – Most are located in second-tier cities scattered across the country and in a mix of urban areas that include transient neighborhoods. They usually choose a mix of attached products, townhouses, and small houses. Head of householder's age: 90% are in the age bracket of 19 to 35 years.

Moderate Target Markets – Alpena County

O55     Family Troopers – Families living in small cities and villages. They tend to live in older attached formats like duplexes and low-rise buildings, and in ranch houses. Head of householder's age:  85% are 19 to 35 years.

Q65     Senior Discounts – Seniors living throughout the country and particularly in metro communities, big cities, and inner-ring suburbs. They tend to live in large multiplexes geared for seniors, and prefer that security over living on their own. Head of householder's age: 98% are over the age of 51, and 84% are over 66 years.

R66     Dare to Dream – Young households scattered in mid-sized cities across the country, particularly in the Midwest, and within older transient city neighborhoods. They are sharing crowded attached units to make ends meet; and in buildings built before 1925 that offer few amenities. Some are growing families living in older ranch-style houses and duplexes. Head of householder's age: 71% are younger than 45 years, and 32% are younger than 30 years.

S70     Tight Money – Centered in the Midwest and located in exurban and small cities and villages, including bedroom communities to larger metro areas, and in transitioning and challenging neighborhoods. They are living in low-rises and some in duplexes, but few can afford to own a house. Head of householder's age: 53% are between 36 and 50 years.

S71     Tough Times – Living east of the Mississippi River and in aging city neighborhoods. They tend to live in multiplexes built in the urban renewal era of the 1960's to 1980's, when tenement row houses in downtowns were being bulldozed to create new housing for low income and disadvantaged households. Many of their buildings are declining and the tenants are intent on finding alternatives.  Head of householder's age: 68% are between 51 and 65 years.

The other upscale and moderate target markets are choosing other counties in the region – although not always in large numbers. Alpena County must be proactive in order to intercept these other target markets. Placemaking initiatives, job creation, and reinvestment are good strategies; and others are discussed in the Methods Book within the Regional Workbook.

## Prevalent Lifestyle Clusters

The upscale and moderate target markets represent a small share of the annual market potential for Alpena County, but the model also measures the potential among other and more prevalent lifestyle clusters. The most prevalent lifestyle clusters for Alpena County are documented in Section G of this report, with details for each city (Alpena) and census designated place (Ossineke).

As shown in Exhibit G.3, the most prevalent lifestyle clusters in Alpena County include Town Elders, Homemade Happiness, Booming and Consuming, Rural Escape, and Red White and Bluegrass. Through their large numbers, households in these clusters collectively generate most of the market potential for attached units.

The following Table 4 provides a summary of these lifestyle clusters with their propensity to choose attached units, renter tenure, and renter movership rates. About 9% of the Booming and Consuming households will choose attached units, 17% are likely to be renters, and 32% of those renters move each year. However, few of the other households in that cluster will choose an attached housing unit – particularly if offered quality alternatives among detached houses. So, targeting these households with new attached units may involve some higher-than-usual risks.

Table 4
Most Prevalent Lifestyle Clusters
Alpena County, Michigan –Year 2016

| Lifestyle Cluster Name | Share in Attached Units | Renters as a Share of Total | Renter Movership Rate | Alpena County Hhlds. |
|---|---|---|---|---|
| N46  True Grit Americans | 4% | 9% | 25% | 2,500 |
| Q64  Town Elders | 3% | 4% | 5% | 2,000 |
| J35   Rural Escape | 3% | 3% | 9% | 1,600 |
| E21   Unspoiled Splendor | 2% | 2% | 4% | 1,200 |
| L43   Homemade Happiness | 3% | 5% | 13% | 900 |
| M45  Infants, Debit Cards | 5% | 30% | 34% | 800 |
| M44  Red, White, Bluegrass | 5% | 11% | 12% | 700 |

Prevalent Lifestyle Clusters – Alpena County

N46     True Grit Americans – Typically in scenic settings and small cities and villages throughout the Midwest, and in remote rural areas. Living in older houses and cottages, mainly ranch or craftsman-style houses built before 1970. Head of householder's age: Diverse age profile with 36% between 36 and 50 years.

Q64     Town Elders – Seniors living in small and rural communities; in detached ranch houses and bungalows typically situated on small lots and built more than half a century ago. Head of householder's age: 98% are over 66 years.

J35     Rural Escape – Empty nesters living in remote and quiet communities, and retirement havens; and choosing detached houses on large lots, or manufactured homes. Head of householder's age: 69% are over 51 years, and 49% are over 66 years.

E21     Unspoiled Splendor – Scattered locations across small remote rural communities in the Midwest. Most live in detached houses that are relatively new and built since 1980, on sprawling properties with at least 2 acres. Head of householder's age: 87% are between 51 and 65 years.

L43     Homemade Happiness – Empty nesters living in Midwest heartland; in houses built in 1970 (with 15% in manufactured homes), but on large lots in rustic settings to enjoy the quiet country. Head of householder's age: 97% are over 51 years, including 88% between 51 and 65 years.

M45     Infants and Debit Cards – Living in small cities and older, inner-ring and transient neighborhoods. Most are in small detached houses built before 1960 and located near small factories and industrial areas. Head of householder's age:  78% are under 45 years, and 54% are 35 years or younger.

M44     Red, White, and Bluegrass – Families living in scattered locations across the Eastern States; and choosing detached family-style ranches, farmhouses, and bungalows on large lots, or manufactured homes. Head of householder's age: 74% are between 25 and 45 years.

## Conservative Scenario

The TMA model for Alpena County has been conducted for two scenarios, including a conservative (minimum) and aggressive (maximum) scenario.  The conservative scenario is based on in-migration into the county and each of its local places, and is unadjusted for out-migration. It does not include households that are already living in and moving within the local communities.

Results of the conservative scenario are presented in three exhibits in Section C attached to this report, with a focus on county totals. Exhibit C.1 is a summary table showing the county-wide, annual market potential for all 71 lifestyle clusters, the 8 upscale target markets, and the 8 moderate target markets. The 71 lifestyle clusters include all existing households currently living in Alpena County, whether they are prevalent or represent a small share of the total.

Under the conservative scenario, Alpena County has an annual market potential for at least 166 attached units (excluding detached houses), across a range of building sizes and formats. Of these 166 attached units, about 13 will be occupied by households among the upscale target markets, and 142 will be occupied by moderate target market households. The remaining 11 units will be occupied by other lifestyle clusters that are prevalent in the county – but with a lower propensity to choose Missing Middle Housing Formats.

Exhibit C.2 and Exhibit C.3 show these same figures with owners at the top of the table and renters at the bottom of the table. Also shown are the detailed results for each of the upscale target markets (Exhibit C.2) and moderate target markets (Exhibit C.3).

## Aggressive Scenario

The aggressive scenario represents a maximum or not-to-exceed threshold based on current migration patterns within and into Alpena County, and unadjusted for out-migration. It also assumes that every household moving into and within Alpena County would prefer to trade-up into a refurbished or new unit rather than occupy a unit that has not been unimproved.

Attached Section D of this report includes a series of tables that detail the market potential under the aggressive (maximum) scenario. The following Table 5 provides a summary and comparison between the aggressive and conservative scenarios, with a focus on attached units only.

As shown, the aggressive scenario for Alpena County is four times larger than the conservative scenario. For most other counties in the region, the aggressive scenario is only twice as large as the conservative scenario. The difference can be directly traced to low rates of in-migration into Alpena County compared to other counties in the region.

Under the aggressive scenario, a small share of the annual market potential for attached units (59 units, or 8%) is generated by households that are prevalent in Alpena County (i.e., they are the "Most Prevalent Clusters"). Although they are prevalent in the county, they have a low inclination to choose attached units.

The majority (92%) of market potential is generated by households that have a higher propensity to choose attached units (thus, they are the "Target Markets"). They are living in Alpena County in relatively few numbers, but have high movership rates and are good targets for Missing Middle Housing formats.

Table 5
Annual and Five-Year Market Potential – Attached Units Only
71 Lifestyle Clusters by Scenario
Alpena County, Michigan – 2016

| Renters and Owners Attached Units Only | Conservative Scenario (Minimum) | | Aggressive Scenario (Maximum) | |
|---|---|---|---|---|
| | Annual # Units | 5 Years # Units | Annual # Units | 5 Years # Units |
| Upscale Targets | 13 | 65 | 59 | 295 |
| Moderate Targets | 142 | 710 | 597 | 2,985 |
| Most Prevalent Clusters | 11 | 55 | 59 | 295 |
| 71 Lifestyle Clusters | 166 | 830 | 715 | 3,575 |

For Alpena County, the large difference between the conservative and aggressive scenarios is attributed to relatively low rates of in-migration into the county. Only 6% of existing households migrated into the county last year, and are new residents. In comparison at least 10% and as much as 15% of existing households in the other counties can be attributed to in-migration, with an average of about 12%. (Note: These in-migration figures have not been adjusted for out-migration.)

All figures for the five-year timeline assume that the annual potential is fully captured in each year through the rehabilitation of existing units, plus conversions of vacant buildings (such as vacant warehouses or schools), and some new-builds. If the market potential is not captured in each year, then the balance does not roll-over to the next year. Instead, the market potential will dissipate into outlying areas or be intercepted by competing counties in the region.

Note: Additional narrative is included in the Methods Book within the Regional Workbook, with explanations of the conservative and aggressive scenarios, upscale and moderate target markets, and the annual and 5-year timelines.

## "Slide" by Building Format

All exhibits in the attached Section B through Section F show the model results before any adjustments are made for the magnitude of market potential relative to building size. For example, under the conservative scenario, Alpena County has an annual market potential for up to 22 units among buildings with 100 or more units each. This is not enough to support development of a 100+ unit building. However, the units can "slide" down into smaller buildings, and the following Table 6 demonstrates those adjusted results.

Table 6
Annual Market Potential – "Slide" along Formats (in Units)
71 Lifestyle Clusters – Conservative and Aggressive Scenarios
Alpena County, Michigan – 2016

| Number of Units by Building Format/Size | Conservative Scenario | | Aggressive Scenario | |
|---|---|---|---|---|
| | Unadjusted w/out Slide | Adjusted with Slide | Unadjusted w/out Slide | Adjusted with Slide |
| 1 \| Detached Houses | 179 | 179 | 670 | 670 |
| 2 \| Side-by-Side & Stacked | 10 | 10 | 40 | 40 |
| 3 \| Side-by-Side & Stacked | 18 | 18 | 81 | 81 |
| 4 \| Side-by-Side & Stacked | 9 | 12 | 44 | 44 |
| 5-9 \| Townhouse, Live-Work | 48 | 45 | 203 | 203 |
| 10+\| Multiplex: Small | 17 | 17 | 72 | 72 |
| 20+ \| Multiplex: Large | 24 | 64 | 102 | 102 |
| 50+ \| Midrise: Small | 18 | 0 | 74 | 73 |
| 100+ \| Midrise: Large | 22 | 0 | 99 | 100 |
| Subtotal Attached | 166 | 166 | 715 | 715 |

(Note: Additional explanations for "sliding" the market potential along building formats are provided in the Methods Book within the Regional Workbook. Significant portions of the Methods Book are also dedicated to explanations of building formats, Missing Middle Housing typologies, and recommended branding strategies for developers and builders.)

## The City of Alpena and Ossineke CDP

Section E attached to this Market Strategy Report details the annual market potential and model results for each city (Alpena) and census designated place (Ossineke) within Alpena County. Results are shown for the aggressive scenario only, which is based on both migration into, and internal movership within each community.

Table 7 on the following page shows the annual results, including a) unadjusted model results for the aggressive scenario, and b) adjustments with a "slide" along building sizes. The conservative scenario (reflecting in-migration only) is not provided for the local places, but it can be safely assumed that results would be about one-fourth (1/4) as large as the aggressive scenario. (Note: For most other counties in the region, the conservative scenario is about half the size of the aggressive scenario.)

Intercepting Migrating Households – The market potential for each place is based on the known inclination for households to move into and within that place. When few if any households are moving into or within a given place, then the market potential will be zero. To experience population growth, Ossineke CDP must do a better job of competing with other communities in the region and intercepting migrating households. This can best be accomplished with a combination of job creation, placemaking processes, and real estate investment.

As demonstrated in the prior section of this report, there is an annual market potential of 715 attached units throughout Alpena County (under the aggressive scenario). The City of Alpena, Ossineke CDP, and various townships can each compete for the households migrating throughout the county and seeking those choices. Some (albeit not all) of these households will be seeking townhouses and waterfront "condominiums" with vista views of Lake Huron, inland lakes and/or downtown districts – if they are made available.

The City of Alpena – Based on the magnitude and profile of households already moving into and within the City of Alpena, it has an annual market potential for 439 attached units, each year through the year 2020. This includes up to 153 units in townhouse, row house, or live-work formats. It can support 17 to 30 buildings that are townhouses or row houses, depending on the building size. If there are 9 units per building, then there could be 17 buildings. If there a 5 units per building, then there could be 30 buildings. Additional units and buildings can be added only if the city demonstrates an ability to intercept households that might choose other locations in Alpena County, or by creating new jobs.

Table 7
Annual Market Potential – "Slide" along Formats (in Units)
71 Lifestyle Clusters – Aggressive Scenario
Alpena County, Michigan – 2016

| Number of Units Unadjusted Model Results | City of Alpena | CDP Ossin-eke | Alpena County Totals |
|---|---|---|---|
| 1 \| Detached Houses | 470 | 18 | 670 |
| 2 \| Side-by-Side & Stacked | 35 | 1 | 40 |
| 3 \| Side-by-Side & Stacked | 71 | 1 | 81 |
| 4 \| Side-by-Side & Stacked | 34 | 1 | 44 |
| 5-9 \| Townhouse, Live-Work | 153 | 5 | 203 |
| 10-19 \| Multiplex: Small | 27 | 3 | 72 |
| 20-49 \| Multiplex: Large | 38 | 5 | 102 |
| 50-99 \| Midrise: Small | 33 | 2 | 74 |
| 100+ \| Midrise: Large | 48 | 1 | 99 |
| Subtotal Attached | 439 | 19 | 715 |

| Number of Units Adjusted with "Slide" | City of Alpena | CDP Ossin-eke | Alpena County Totals |
|---|---|---|---|
| 1 \| Detached Houses | 470 | 18 | 670 |
| 2 \| Side-by-Side & Stacked | 36 | 0 | 40 |
| 3 \| Side-by-Side & Stacked | 72 | 3 | 81 |
| 4 \| Side-by-Side & Stacked | 32 | 0 | 44 |
| 5-9 \| Townhouse, Live-Work | 153 | 5 | 203 |
| 10+ \| Multiplex: Small | 27 | 11 | 72 |
| 20+ \| Multiplex: Large | 38 | 0 | 102 |
| 50+ \| Midrise: Small | 81 | 0 | 73 |
| 100+ \| Midrise: Large | 0 | 0 | 100 |
| Subtotal Attached | 439 | 19 | 715 |

Ossineke CDP – Results of the market potential model indicate that there is no need for the Ossineke CDP to add new attached housing formats. It will be challenging but not impossible for these communities to intercept households that are on the move within Alpena County.

## Non-Residents and Seasonality

In many of Michigan's counties, seasonal residents and non-residents comprise a significant share of total households. Seasonal residents are captured in the market potential, but seasonal non-residents are not. So, in some unique markets with exceptionally high seasonality, even the aggressive scenario can be viewed as being more than reasonable.

In some unique markets, local developers may be particularly interested in understanding the upside market potential for new housing units that could be specifically designed for seasonal non-resident households. To provide some perspective, LandUse|USA has calculated an adjustment factor for each place in Alpena County and based on data and assumptions that are described in the Methods Book (see narrative within the Regional Workbook). Results may be applied to the market potential within some of the markets – but some care and discretion are still recommended to avoid over-building.

|  | Market Potential |
|---|---|
| Seasonal Non-Residents | "Premium" |
| The City of Alpena | + 1% |
| The Village of Hillman | + 3% |
| Ossineke CDP | +10% |
| Alpena COUNTY | + 7% |

## Rents and Square Feet

This section of the report focuses on contract rents and unit sizes, and stakeholders are encouraged to review the materials in Section $F_1$ for information on rents (and Section $F_2$ for home values). Exhibit $F_1$.1 and Exhibit $F_1$.4 demonstrate the general tolerance of the upscale and moderate target markets to pay across contract rent brackets, with averages for the State of Michigan.

Exhibit $F_1$.2 and Exhibit $F_1$.5 document the allocation of annual market potential across rent brackets for Alpena County, and Exhibit $F_1$.3 and Exhibit $F_1$.6 show the market potential results. Results are also shown in the following Table 8, with a summary for the upscale and moderate target markets under the aggressive scenario.

Table 8
Annual Market Potential by Contract Rent Bracket
71 Lifestyle Clusters – Aggressive Scenario
Alpena County, Michigan – 2016 Constant Dollars

| | Renter-Occupied Contract (Cash) Rent Brackets | | | | | |
|---|---|---|---|---|---|---|
| Renter Occupied Units | $ 0 | $600 | $800 | $1,000 | $1,500- | Total |
| Attached and Detached | $600 | $800 | $1,000 | $1,500 | $2,000+ | Potential |
| Upscale Targets | 36 | 43 | 21 | 6 | 2 | 108 |
| Moderate Targets | 343 | 205 | 74 | 24 | 20 | 666 |
| Prevalent Clusters | 165 | 107 | 29 | 5 | 2 | 308 |
| Alpena County | 544 | 355 | 124 | 35 | 24 | 1,082 |

Note: Figures in Table 8 are for renter-occupied units only, and might not perfectly match the figures in prior tables due to rounding within the market potential model.

Exhibit $F_1$.7 shows median contract rents for Alpena County's local places, which can be used to make local level adjustments as needed. Exhibit $F_1$.8 can be used to convert contract rents into gross rents. For general reference, Exhibit $F_1$.9 demonstrates the direct relationship between contract rents and median household incomes across all 71 lifestyle clusters.

Lastly, Exhibit F$_1$.10 shows forecast rents per square foot, with averages for attached units that are newly built, rehabilitated, or significantly remodeled. These figures are based on existing choices throughout Alpena County, and are used to estimate the amount of supportable square feet within each rent bracket. The following Table 9 summarizes the results, and supporting documentation is provided in Section N (renter choices only) in the Regional Workbook.

Table 9
Typical Unit Sizes by Contract Rent Bracket
Attached Units Only
Alpena County, Michigan – 2016 Constant Dollars

| | Renter-Occupied Contract (Cash) Rent Brackets | | | | |
|---|---|---|---|---|---|
| Contract Rent Brackets (Attached Units Only) | $ 0-$600 | $600-$800 | $800-$1,000 | $ 1,000-$1,500 | $1,500-$2,000+ |
| Minimum Square Feet | 425 | 500 | 1,100 | 1,500 | 1,500 sq. ft. |
| Maximum Square Feet | 600 | 1,200 | 1,600 | 1,800 | 1,800 sq. ft. |

The analysis is also conducted for owner-occupied choices, and stakeholders are encouraged to review the materials in Section O for those results. Again, additional explanations of the methodology and approach are also provided within the Methods Book included in the Regional Workbook.

## Comparison to Supply

This last step of the TMA compares the market potential to Alpena County's existing supply of housing by building format, and for all 71 lifestyle clusters. The attached Exhibit B.1 is a histogram displaying the results.

To complete the comparison, it is first determined that among all renters and owners in Michigan, a weighted average of about 14% will move each year. Theoretically, this suggests that it will take roughly 7 years for 100% of the housing stock to turn-over. Therefore, the annual market potential is multiplied by 7 before comparing it to the existing housing stock.

Results reveal that there is no need for building new detached houses in Alpena County. However, 4,690 households will be seeking existing houses to move into – and it is assumed that most would prefer one that has been refurbished or significantly remodeled.

In comparison, the potential for townhouses, row houses, and similar formats exceeds the current supply. The results suggest a gap of about 1,152 units among townhouses, row houses, and live-work formats; and suggest a net gap of 1,882 units among all attached formats. These figures are detailed in the following Table 10.

Table 10
Seven-Year Cumulative Market Potential v. Existing Units
71 Lifestyle Clusters – Aggressive Scenario
Alpena County, Michigan – 2016 - 2022

| Number of Units by Building Format | Potential 7-Year Total | Existing Housing Units | Implied Gap for New-Builds |
|---|---|---|---|
| 1 \| Detached Houses | 4,690 | 13,884 | . |
| 2 \| Duplex, Subdivided House | 280 | 883 | -603 |
| 3-4 \| Side-by-Side, Stacked | 875 | 406 | 469 |
| Subtotal Duplex – Fourplex | 1,155 | 1,289 | -134 |
| 5-9 \| Townhouse, Live-Work | 1,421 | 269 | 1,152 |
| 10-19 \| Multiplex: Small | 504 | 122 | 382 |
| 20-49 \| Multiplex: Large | 714 | 221 | 493 |
| 50+ \| Midrise: Small | 1,211 | 204 | 1,007 |
| Subtotal Multiplex & Midrise | 2,429 | 547 | 1,882 |
| Total Attached Units | 5,005 | 2,105 | 2,900 |

The histogram comparing the 7-year market potential with Alpena County's existing housing units is intended only to provide a general sense of magnitude. Direct comparisons will be imperfect for a number reasons described on the following page.

Exhibit B.1 – Some Cautionary Observations

1. The market potential has not been refined to account for the magnitude of market potential among building sizes, and is not adjusted for a "slide" along building formats.

2. The histogram relies on data for existing housing units as reported by the American Community Survey (ACS) and based on five-year estimates through 2013. The data and year for the market potential is different, so comparisons will be imperfect.

3. On average, the existing housing stock should be expected to turnover every 7 years, with variations by tenure and lifestyle cluster. However, owner-occupied units have a slower turn-over rate (about 15 years), whereas renter occupied units tend to turn-over at least every 3 years. Again, these differences mean that direct comparisons are imperfect.

4. The 7-year market potential assumes that the market potential is fully met within each consecutive year. However, if Alpena County cannot meet the market potential in any given year, then that opportunity will dissipate.


## Market Assessments – Introduction

The following sections of this report provide a qualitative market assessment for Alpena County and the City of Alpena. It begins with an overview of county-wide economic advantages, followed by a market assessment for Alpena. The last section provides results of a PlaceScore^TM analysis for Alpena, based on placemaking attributes relative to other cities and villages throughout the State of Michigan.

Materials attached to this report include Section A with a downtown aerial and a photo collage, and Section H with demographic profiles and the comparative analysis of PlaceScores^TM. Interested stakeholders are encouraged to study these resources for additional perspective and local context, and the following narrative provides a summary of some key observations.

## Alpena County – Overview

Alpena County has Northeast Michigan's largest city (Alpena, population of 10,421 in 2013) and has good access with a state highway system. The US Highway 23 Heritage Route is a scenic route along the Lake Huron Shoreline, Highway 32 connects west to Montmorency County, and Highway 65 connects north to Presque Isle County and south to Alcona County. According to the Michigan Department of Transportation (2014), average daily traffic was highest along Highway 23 with 5,200 vehicles between the City of Alpena and the Ossineke CDP.

| Average Daily Traffic (ADT) | | Adjacent County | Adjacent County |
|---|---|---|---|
| ➢ Highway 23 | 5,200 | Presque Isle (north) | Alcona (south) |
| ➢ Highway 32 | 3,900 | Montmorency (west) | -- |
| ➢ Highway 65 | 2,100 | Presque Isle (north) | Alcona (south) |

In Alpena County, the Lake Huron shoreline is mostly undeveloped and serves as a recreational playground for residents and visitors. Together with other counties on Michigan's Sunrise Side, it draws recreational enthusiasts from throughout the state and Upper Midwest. The county also offers a unique national and state resource – the Thunder Bay National Marine Sanctuary. Examples of other amenities and recreational resources are provided in the following list.

Alpena County Amenities (examples)
- ➢ Thunder Bay River State Forest
- ➢ US Highway 23 Heritage Route & Shoreline
- ➢ Thunder Bay National Marine Sanctuary and Underwater Preserve (Nation's only freshwater marine sanctuary)
- ➢ Glass bottom boat tours of shipwrecks
- ➢ Mapped Alpena Blueways and Thunder Bay River
- ➢ Michigan Islands National Wildlife Refuge & Islands
- ➢ The City of Alpena Municipal Marina
- ➢ Alpena Trail Town Plan

## The City of Alpena Advantage

Geographic Setting – The City of Alpena is located at the Thunder Bay River outlet into Lake Huron (see aerial photos in <u>Section A</u>), which gives it a competitive advantage on tourism, outdoor recreation, and industrial manufacturing. The community and its downtown offer unique shopping choices that showcase locally made products.

Located along the Thunder Bay River, the Alpena Bi-Path provides an urban trail for downtown mobility and access to the Alpena Wildlife Sanctuary. The city has three docks – the West Dock (co-owned by DPI and Lafarge), the Lafarge Dock, and a municipal marina (143 slips). Alpena's downtown aligns along the U.S. Highway 23 Heritage Route, and the eastern end (West Washington Avenue) creates a terminated vista into the district.

Economic Profile – The Alpena County Regional Airport is located about 5 miles west of the city and supports the region's economy with air transportation of supply-chain and trade goods, as well as passenger travel. It is also the world headquarters of Besser Company, a manufacturer of concrete block machines. The World Center for Concrete Technology (WCCT) – a training facility at the Alpena Community College – supports this industry by providing technical job training for skilled workers.

The City of Alpena also benefits economically as the county seat and several federal agencies have local offices in the city, including: a) National Oceanic and Atmospheric Administration, b) Department of Natural Resources, and c) U.S. Fish and Wildlife Service.  It also the last northern destination of the eastern branch of the Lake State Railway, with freight transit with Saginaw and Flint.

> The City of Alpena | Major Employers (examples)
> ➤ National Oceanic and Atmospheric Admin. | Govt. Services
> ➤ Department of Natural Resources | Govt. Services
> ➤ U.S. Fish and Wildlife Service | Govt. Services
> ➤ Michigan Army National Guard | Govt. Services
> ➤ Alpena Regional Medical Center | 146 beds
> ➤ Alpena Public Schools | Education
> ➤ Alpena Community College | Education
> ➤ Decorative Panels International | Wood
> ➤ Lafarge Limestone Quarry | Mining
> ➤ Besser Company Concrete Equipment | Mfg.
> ➤ Walmart | Retailer

Note: Alpena is gaining jobs through a planned Holiday Inn Express that will employ 20-25 workers. A local brewery is also opening and expected to create about 15 new full-time jobs.

Investment Opportunities – Alpena has recently experienced an increase in local investment, including the addition of new housing choices at nine downtown addresses through MSHDA programs. Meanwhile, a number of properties along the Thunder Bay River are underutilized and could be redeveloped into mixed-use projects with river-front views and river-breeze patios. These types of would help activate the district and could be transformative for the downtown.

Riverfront properties include a former power company building, which is planned for demolition and redevelopment into a mixed-use project with new housing choices. A former Armory building is also located along the river, but is a particularly challenging project. In addition, a variety of under-utilized lots along Alpena's main corridors could be redeveloped into mixed-use projects with new housing choices. Buildings like the former Bingham Arts Academy could be converted into residential units; and several large historic buildings may be ideal for introducing new housing choices among lofts and/or flats. See photo collages in Section A for these and other investment opportunities.

## The Ossineke Advantage

Ossineke is an unincorporated census designated place (CDP) ideally located along the US Highway 23 Heritage Route, about 15 miles south of Alpena and 20 miles north of Harrisville. It is surrounded by the Thunder Bay River State Forest which it leverages for tourism and visitor traffic (see aerial photos in Section A). The community is mostly residential with just over 400 households and stable with slow growth among it home owners. It includes private residences along 2.5 miles of Lake Huron's shoreline, but the community's core is about two miles inland.

## Analysis of PlaceScores™

Introduction – Placemaking is a key ingredient for achieving the City of Alpena's full residential market potential, particularly under the aggressive or maximum scenario. Extensive internet research was conducted to evaluate the success of the City of Alpena relative to other communities throughout Michigan. PlaceScore™ criteria are tallied for a possible 30 total points, and based on an approach that is explained in the Methods Book (see the Regional Workbook).  Results are detailed in Section H of this report.

Summary of the PlaceScores – The City of Alpena is the largest community in Alpena County, and was the focus of the PlaceScore analysis. It scores relatively high with an overall PlaceScore of 27 points out of 30 possible.

PlaceScore v. Market Size – There tends to be a correlation between PlaceScore and the market size in population. If the scores are adjusted for the market size (or calculated based on the score per 1,000 residents), then the results reveal an inverse logarithmic relationship. Smaller markets may have lower scores, but their points per 1,000 residents tend to be higher. Larger markets have higher scores, but their points per 1,000 residents tend to be lower. While the City of Alpena's adjusted PlaceScore for market size is low, it scores within a range that is expected for a city of its size. These relationships are also shown in Exhibit H.12 and Exhibit H.13.

## Contact Information

This concludes the Draft Market Strategy Report for the Alpena County Target Market Analysis. Questions regarding economic growth, downtown development initiatives, and implementation of these recommendations can be addressed to Denise Cline, with the Northeast Michigan Council of Governments.

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> (989) 705-3730
> Northeast Michigan Council of Governments
> 80 Livingston Blvd Suite U-108
> Gaylord, MI 49734

Questions regarding the work approach, methodology, TMA terminology, analytic results, strategy recommendations, and planning implications should be directed to Sharon Woods at LandUse|USA.

> Sharon M. Woods, CRE
> Principal, TMA Team Leader
> LandUse|USA, LLC
> www.LandUseUSA.com
> sharonwoods@landuseusa.com
> (517) 290-5531 direct

# A - H

## Alpena County

# Table of Contents

# A
# Investment Opportunities

Aerial Photo | Urban and Downtown Perspective with 0.5 Mile Radius
The City of Alpena | Alpena Co. | NE Michigan Prosperity Region 3

Exhibit A.1

0.5 mi radius

Imagery ©2015 , Cnes/Spot Image, DigitalGlobe, USDA Farm Service Agency

Source: Underlying aerial provided to Google Earth and licensed to LandUse|USA through Sites|USA.
Exhibit prepared by LandUse|USA; 2016 ©.

Images Conveying the Downtown Character and Placemaking Amenities
The City of Alpena | Alpena County | NE Michigan Prosperity Region 3



Photo Credits: Original photos with copyrights (c) held by LandUse|USA, 2016.

Examples of Investment Opportunities for Adding Unique Housing Formats
The City of Alpena | Alpena County | NE Michigan Prosperity Region 3



Above | Glimpses of Thunder Bay River; prime location.



Above | Vacant Bingham Arts Acadamy; closed 2015



Above | Vacant Armory Building on the Thunder Bay River; challenging restoration project

Photo Credits: Original photos with copyrights (c) held by LandUse|USA, 2016.
Provides representative examples only; prospective investors are encouraged to contact the community for more information.

Examples of Investment Opportunities for adding Unique Housing Formats
The City of Alpena | Alpena County | NE Michigan Prosperity Region 3




Above | Centennial Building on W. Chisolm St. - Hopeful restoration by new owners





Above | Flower shop and vacant lot on W. Chisholm Street

Photo Credits: Original photos with copyrights (c) held by LandUse|USA, 2016.
Provides representative examples only; prospective investors are encouraged to contact the community for more information.

Possible Opportunities for adding Unique Housing Formats
The City of Alpena | Alpena County | NE Michigan Prosperity Region 3



Above | Existing Alpena Furniture Gallery on the Thunder Bay River



Above | Vacant power company buildings on the Thunder Bay River; planned for demolition

Photo Credits: Original photos with copyrights (c) held by LandUse|USA, 2016.
Provides representative examples only; prospective investors are encouraged to contact the community for more information.

Opportunities for Horizontal Expansions Adjacent to Existing Buildings
The City of Alpena | Alpena County | NE Michigan Prosperity Region 3



Photo Credits: Original photos with copyrights (c) held by LandUse|USA, 2016.
Provides representative examples only; prospective investors are encouraged to contact the community for more information.

Relatively Small Rehab Opportunities among Existing Buildings
The City of Alpena | Alpena County | NE Michigan Prosperity Region 3



Photo Credits: Original photos with copyrights (c) held by LandUse|USA, 2016.
Provides representative examples only; prospective investors are encouraged to contact the community for more information.

Relatively Large Rehab Opportunities among Existing Buildings
The City of Alpena | Alpena County | NE Michigan Prosperity Region 3



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Provides representative examples only; prospective investors are encouraged to contact the community for more information.

Aerial Photo | Urban and Downtown Perspective with 0.5 Mile Radius
Ossineke CDP | Alpena Co. | NE Michigan Prosperity Region 3

Exhibit A.9

0.5 mi radius

Source: Underlying aerial provided to Google Earth and licensed to LandUse|USA through Sites|USA.
Exhibit prepared by LandUse|USA; 2016 ©.

List of Investment Opportunities for Missing Middle Housing

Alpena County | Northeast Michigan Prosperity Region 3 | Year 2016

| | City, Township | Water Front | Down Town | Existing Conditions/Current Use Notes and Comments | Investment Opp./Future Use Notes and Comments |
|---|---|---|---|---|---|
| 1 | The City of Alpena | No | Yes | Bingham Arts Acadamy, 555 S. Fifth St. School has been vacant for roughly two years. | Available for renovation. |
| 2 | The City of Alpena | No | No | Vacant 25 acres on Pinecrest St. | Site has the potential for attached housing; 150 units sits directly across the street. |
| 3 | The City of Alpena | Yes | Yes | Alpena National Guard Armory (Memorial Hall), 201 Water St. Certified historic site built in 1919 using Renaissance Revival architecture. 48,000 sq. ft, zoned PUD. Currently in use. | Eligible for state and federal tax credits. Available for renovation. |
| 4 | The City of Alpena | Yes | Yes | Former power company structure on Water St., between 1st and 2nd Avenues. A large vacant building with significant river frontage. | Future demolition anticipated, with ideal location for redevelopment into a mixed-use project with upper-level townhouses, lofts, and/or flats. |
| 1 | Ossineke, CDP | No | Yes | Downtown corridor 2-level structures, currently in use. | Potential rental rehab for upper level flats or lofts and façade improvements. |

Notes: This investment list focuses on the region's largest projects that include a residential component.
Most of this information has been provided by local stakeholders and has not been field verified.
Reflects Interviews and market research by LandUse|USA, 2016.

# B

## Summary
## Tables and Charts

**7-Year Market Potential v. Total Existing Housing Units**
**All 71 Lifestyle Clusters - Aggressive Scenario**
**Alpena County, Michigan - 2016 - 2022**



Legend:
- ■ 7-Year Market Potential
- ■ Total Existing Housing Units

| Category | 7-Year Market Potential | Total Existing Housing Units |
|---|---|---|
| Midrise: Small, Large | 1,211 | 204 |
| Multiplex: Large | 714 | 221 |
| Multiplex: Small | 504 | 122 |
| Townhse., Live-Work | 1,421 | 269 |
| Triplex, Fourplex | 875 | 406 |
| Subdivided Houses | 280 | 883 |
| Detached Houses | 4,690 | 13,884 |

Number of Housing Units

Source: Based on analysis and target market analysis modelling conducted exclusively by LandUse|USA; 2016 (c) with all rights reserved. Unadjusted for seasonally occupied houses.

Exhibit B.2

Missing Middle Housing Formats v. Detached Houses
Preferences of Most Prevalent Lifestyle Clusters
Northeast Michigan Prosperity Region 3 - Year 2016

Share of All Owner and Renter Occupied Units

100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%

Unspoiled Splendor E21 | Rural Escape J35 | Booming and Consuming L41 | Homemade Happiness L43 | Red White and Bluegrass M44 | True Grit Americans N46 | Town Elders Q64 | Small Town Shallow Pockets S68

Legend

Midrise: Lg. | 100+

Midrise: Sm.| 50+

Multiplex: Lg.| 20+

Multiplex: Sm. | 10+

Townhouse | 5-9

Fourplex | 4

Triplex | 3

Subdivided | 2

Detached House | 1

Residential Market Parameters for Most Prevalent Lifestyle Clusters
High Preference for Detached Houses - Northeast Michigan Prosperity Region 3
With Data Averages for the State of Michigan - 2015

| Lifestyle Cluster \| Code | Detached House 1 Unit | Duplex Triplex Fourplex 2-4 Units | Townhse., Live-Work 6+ Units | Midplex 20+ Units | Renters Share of Hhlds. | Owners Share of Hhlds. | Renters Mover Rate | Owners Mover Rate | Blended Mover-ship Rate |
|---|---|---|---|---|---|---|---|---|---|
| **MOST PREVALENT CLUSTERS** | | | | | | | | | |
| Unspoiled Splendor \| E21 | 98% | 1% | 1% | 0% | 2% | 98% | 4% | 1% | 2% |
| Rural Escape \| J35 | 97% | 1% | 1% | 0% | 3% | 97% | 9% | 2% | 4% |
| Booming and Consuming \| L41 | 91% | 3% | 5% | 1% | 17% | 83% | 32% | 8% | 14% |
| Homemade Happiness \| L43 | 97% | 1% | 2% | 0% | 5% | 95% | 13% | 3% | 6% |
| Red White and Bluegrass \| M44 | 95% | 2% | 3% | 0% | 11% | 89% | 12% | 3% | 6% |
| True Grit Americans \| N46 | 96% | 1% | 3% | 1% | 9% | 91% | 25% | 6% | 11% |
| Town Elders \| Q64 | 97% | 1% | 2% | 0% | 4% | 96% | 5% | 1% | 2% |
| Small Town Shallow Pockets \| S68 | 93% | 3% | 4% | 1% | 34% | 66% | 33% | 8% | 15% |
| **INTERMITTENTLY PREVALENT** | | | | | | | | | |
| Touch of Tradition \| N49 | 98% | 1% | 1% | 0% | 6% | 94% | 22% | 5% | 10% |
| Settled and Sensible \| J36 | 98% | 1% | 1% | 0% | 3% | 97% | 10% | 2% | 4% |
| Infants and Debit Cards \| M45 | 95% | 2% | 3% | 0% | 30% | 70% | 34% | 9% | 15% |
| Stockcars and State Parks \| I30 | 97% | 1% | 2% | 0% | 3% | 97% | 10% | 3% | 5% |
| Sports Utility Families \| D15 | 98% | 1% | 2% | 0% | 3% | 97% | 5% | 1% | 2% |

Missing Middle Housing Formats v. Houses
Preferences of Upscale Target Markets
Northeast Michigan Prosperity Region 3 - Year 2016

Exhibit B.4

Share of All Owner and Renter Occupied Units

**Legend**

- Midrise: Lg. | 100+
- Midrise: Sm.| 50+
- Multiplex: Lg.| 20+
- Multiplex: Sm. | 10+
- Townhouse | 5-9
- Fourplex | 4
- Triplex | 3
- Subdivided | 2
- Detached House | 1

Categories (x-axis):
- Full Pocket Empty Nest E19
- Status Seeking Singles G24
- Wired for Success K37
- Bohemian Groove K40
- Full Steam Ahead O50
- Digital Dependents O51
- Urban Ambition O52
- Striving Single Scene O54

Exhibit B.5

Missing Middle Housing Formats v. Houses
Preferences of Moderate Target Markets
Northeast Michigan Prosperity Region 3 | Year 2016

Share of All Owner and Renter Occupied Units

Legend

Midrise: Lg. | 100+

Midrise: Sm.| 50+

Multiplex: Lg.| 20+

Multiplex: Sm. | 10+

Townhouse | 5-9

Fourplex | 4

Triplex | 3

Subdivided | 2

Detached House | 1

Colleges and Cafes O53 | Family Troopers O55 | Humble Beginnings P61 | Senior Discounts Q65 | Dare to Dream R66 | Hope for Tomorrow R67 | Tight Money S70 | Tough Times S71

Residential Market Parameters for Upscale and Moderate Target Markets
Some Preference for Missing Middle Housing - Northeast Michigan Prosperity Region 3
With Data Averages for the State of Michigan - 2015

| Lifestyle Cluster \| Code | Detached House 1 Unit | Duplex Triplex Fourplex 2-4 Units | Townhse., Live-Work 6+ Units | Midplex 20+ Units | Renters Share of Hhlds. | Owners Share of Hhlds. | Renters Mover Rate | Owners Mover Rate | Blended Mover-ship Rate |
|---|---|---|---|---|---|---|---|---|---|
| **UPSCALE TARGET MARKETS** | | | | | | | | | |
| Full Pockets - Empty Nests \| E19 | 67% | 9% | 9% | 15% | 22% | 78% | 18% | 4% | 8% |
| Status Seeking Singles \| G24 | 87% | 5% | 6% | 1% | 30% | 70% | 37% | 9% | 17% |
| Wired for Success \| K37 | 24% | 12% | 16% | 49% | 80% | 20% | 87% | 22% | 40% |
| Bohemian Groove \| K40 | 48% | 17% | 17% | 18% | 91% | 9% | 38% | 10% | 17% |
| Full Steam Ahead \| O50 | 0% | 1% | 1% | 97% | 98% | 2% | 90% | 30% | 54% |
| Digital Dependents \| O51 | 89% | 4% | 6% | 1% | 34% | 66% | 80% | 20% | 36% |
| Urban Ambition \| O52 | 52% | 17% | 20% | 10% | 95% | 5% | 76% | 19% | 34% |
| Striving Single Scene \| O54 | 2% | 5% | 7% | 85% | 96% | 4% | 90% | 28% | 50% |
| | | | | | | | | | |
| **MODERATE TARGET MARKETS** | | | | | | | | | |
| Colleges and Cafes \| O53 | 51% | 11% | 10% | 28% | 83% | 17% | 55% | 14% | 25% |
| Family Troopers \| O55 | 36% | 18% | 19% | 27% | 99% | 1% | 87% | 22% | 40% |
| Humble Beginnings \| P61 | 0% | 1% | 1% | 99% | 97% | 3% | 84% | 21% | 38% |
| Senior Discounts \| Q65 | 0% | 2% | 2% | 96% | 71% | 29% | 28% | 7% | 13% |
| Dare to Dream \| R66 | 63% | 20% | 16% | 1% | 98% | 2% | 58% | 14% | 26% |
| Hope for Tomorrow \| R67 | 63% | 20% | 17% | 1% | 99% | 1% | 65% | 16% | 30% |
| Tight Money \| S70 | 8% | 16% | 20% | 56% | 100% | 0% | 78% | 20% | 36% |
| Tough Times \| S71 | 14% | 6% | 6% | 74% | 95% | 5% | 41% | 10% | 19% |

Source: Underlying data represents Mosaic|USA data provided by Experian Decision Analytics and Powered by Sites|USA.
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# C

# Conservative Scenario

Exhibit C.1

Annual Market Potential for Selected Target Markets - CONSERVATIVE SCENARIO
Number of Units (New and/or Rehab) by Tenure and Building Form
Alpena COUNTY, Michigan - 2016 - 2020

| CONSERVATIVE SCENARIO | Alpena COUNTY 71 Lifestyle Clusters | | | Alpena COUNTY Upscale Target Markets | | | Alpena COUNTY Moderate Target Markets | | |
|---|---|---|---|---|---|---|---|---|---|
| | Total | Owners | Renters | Total | Owners | Renters | Total | Owners | Renters |
| Total Housing Units | 345 | 95 | 250 | 31 | 6 | 25 | 160 | 2 | 158 |
| 1 \| Detached Houses | 179 | 93 | 86 | 18 | 6 | 12 | 18 | 0 | 18 |
| 2 \| Side-by-Side & Stacked | 10 | 0 | 10 | 1 | 0 | 1 | 8 | 0 | 8 |
| 3 \| Side-by-Side & Stacked | 18 | 0 | 18 | 1 | 0 | 1 | 15 | 0 | 15 |
| 4 \| Side-by-Side & Stacked | 9 | 0 | 9 | 1 | 0 | 1 | 8 | 0 | 8 |
| 5-9 \| Townhse., Live-Work | 48 | 0 | 48 | 4 | 0 | 4 | 36 | 0 | 36 |
| 10-19 \| Multiplex: Small | 17 | 0 | 17 | 2 | 0 | 2 | 15 | 0 | 15 |
| 20-49 \| Multiplex: Large | 24 | 0 | 24 | 1 | 0 | 1 | 23 | 0 | 23 |
| 50-99 \| Midrise: Small | 18 | 1 | 17 | 1 | 0 | 1 | 17 | 1 | 16 |
| 100+  \| Midrise: Large | 22 | 1 | 21 | 2 | 0 | 2 | 20 | 1 | 19 |
| Total Units | 345 | 95 | 250 | 31 | 6 | 25 | 160 | 2 | 158 |
| Detached | 179 | 93 | 86 | 18 | 6 | 12 | 18 | 0 | 18 |
| Attached | 166 | 2 | 164 | 13 | 0 | 13 | 142 | 2 | 140 |

Source: Target Market Analysis and exhibit prepared exclusively by LandUses|USA © 2016, all rights reserved.
Notes: Not intended to imply absolutes or exclusive building formats, and may be qualified for unique projects.

Annual Market Potential for Selected Target Markets - CONSERVATIVE SCENARIO
Number of Units (New and/or Rehab) by Tenure and Building Form
Alpena COUNTY, Michigan - 2016 - 2020

Exhibit C.2

| CONSERVATIVE SCENARIO (Per In-Migration Only) | Total 71 Lifestyle Clusters | Upscale Target Markets | Moderate Target Markets | Full Pockets Empty Nests \| E19 | Status Seeking Singles \| G24 | Wired for Success \| K37 | Bohem-ian Groove \| K40 | Full Steam Ahead \| O50 | Digital Depend-ents \| O51 | Urban Ambit-ion \| O52 | Striving Single Scene \| O54 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Target Market - Level | All 71 | Upscale | Moderate | U | U | U | U | U | U | U | U |
| Year of Data | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 |
| Alpena COUNTY - Total | 345 | 31 | 160 | 0 | 0 | 0 | 4 | 6 | 23 | 0 | 0 |
| Alpena COUNTY - Owners | 95 | 6 | 2 | 0 | 0 | 0 | 0 | 0 | 6 | 0 | 0 |
| 1 \| Detached Houses | 93 | 6 | 0 | 0 | 0 | 0 | 0 | 0 | 6 | 0 | 0 |
| 2 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 4 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 5-9 \| Townhse., Live-Work | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10-19 \| Multiplex: Small | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 20-49 \| Multiplex: Large | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 50-99 \| Midrise: Small | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 100+ \| Midrise: Large | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Alpena COUNTY - Renters | 250 | 25 | 158 | 0 | 0 | 0 | 4 | 6 | 17 | 0 | 0 |
| 1 \| Detached Houses | 86 | 12 | 18 | 0 | 0 | 0 | 1 | 0 | 11 | 0 | 0 |
| 2 \| Side-by-Side & Stacked | 10 | 1 | 8 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 |
| 3 \| Side-by-Side & Stacked | 18 | 1 | 15 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 |
| 4 \| Side-by-Side & Stacked | 9 | 1 | 8 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 |
| 5-9 \| Townhse., Live-Work | 48 | 4 | 36 | 0 | 0 | 0 | 1 | 0 | 3 | 0 | 0 |
| 10-19 \| Multiplex: Small | 17 | 2 | 15 | 0 | 0 | 0 | 0 | 2 | 0 | 0 | 0 |
| 20-49 \| Multiplex: Large | 24 | 1 | 23 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 |
| 50-99 \| Midrise: Small | 17 | 1 | 16 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 |
| 100+ \| Midrise: Large | 21 | 2 | 19 | 0 | 0 | 0 | 0 | 2 | 0 | 0 | 0 |

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Note: Due only to rounding, these figures might not sum exact and might not perfectly match summary tables in the narrative report.
Qualifiers: Houses may include rehabs of existing mansion-style houses, carriage-style expansions, and accessory dwelling units.
Duplexes (2), triplexes (3), and fourplexes (4) may include units that are either stacked or side-by-side, and may be subdivided houses.
Townhouses may include row houses and brownstones; and multiplexes may include bungalow courts and courtyard "apartments".

Annual Market Potential for Selected Target Markets - CONSERVATIVE SCENARIO
Number of Units (New and/or Rehab) by Tenure and Building Form
Alpena COUNTY, Michigan - 2016 - 2020

Exhibit C.3

| CONSERVATIVE SCENARIO (Per In-Migration Only) | Total 71 Lifestyle Clusters | Upscale Target Markets | Moderate Target Markets | Colleges Cafes \| O53 | Family Troopers \| O55 | Humble Begin-nings \| P61 | Senior Discount \| Q65 | Dare to Dream \| R66 | Hope for Tomor-row \| R67 | Tight Money \| S70 | Tough Times \| S71 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Target Market - Level | All 71 | Upscale | Moderate | M | M | M | M | M | M | M | M |
| Year of Data | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 |
| Alpena COUNTY - Total | 345 | 31 | 160 | 0 | 35 | 0 | 33 | 47 | 0 | 33 | 11 |
| Alpena COUNTY - Owners | 95 | 6 | 2 | 0 | 0 | 0 | 2 | 0 | 0 | 0 | 0 |
| 1 \| Detached Houses | 93 | 6 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 4 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 5-9 \| Townhse., Live-Work | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10-19 \| Multiplex: Small | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 20-49 \| Multiplex: Large | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 50-99 \| Midrise: Small | 1 | 0 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 |
| 100+ \| Midrise: Large | 1 | 0 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 |
| Alpena COUNTY - Renters | 250 | 25 | 158 | 0 | 35 | 0 | 31 | 47 | 0 | 33 | 11 |
| 1 \| Detached Houses | 86 | 12 | 18 | 0 | 4 | 0 | 0 | 13 | 0 | 1 | 0 |
| 2 \| Side-by-Side & Stacked | 10 | 1 | 8 | 0 | 2 | 0 | 0 | 4 | 0 | 2 | 0 |
| 3 \| Side-by-Side & Stacked | 18 | 1 | 15 | 0 | 4 | 0 | 0 | 9 | 0 | 2 | 0 |
| 4 \| Side-by-Side & Stacked | 9 | 1 | 8 | 0 | 3 | 0 | 0 | 4 | 0 | 1 | 0 |
| 5-9 \| Townhse., Live-Work | 48 | 4 | 36 | 0 | 10 | 0 | 1 | 16 | 0 | 8 | 1 |
| 10-19 \| Multiplex: Small | 17 | 2 | 15 | 0 | 4 | 0 | 4 | 0 | 0 | 5 | 2 |
| 20-49 \| Multiplex: Large | 24 | 1 | 23 | 0 | 4 | 0 | 8 | 0 | 0 | 9 | 2 |
| 50-99 \| Midrise: Small | 17 | 1 | 16 | 0 | 2 | 0 | 8 | 0 | 0 | 4 | 2 |
| 100+ \| Midrise: Large | 21 | 2 | 19 | 0 | 4 | 0 | 10 | 0 | 0 | 2 | 3 |

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Note: Due only to rounding, these figures might not sum exact and might not perfectly match summary tables in the narrative report.
Qualifiers: Houses may include rehabs of existing mansion-style houses, carriage-style expansions, and accessory dwelling units.
Duplexes (2), triplexes (3), and fourplexes (4) may include units that are either stacked or side-by-side, and may be subdivided houses.
Townhouses may include row houses and brownstones; and multiplexes may include bungalow courts and courtyard "apartments".

# D

# Aggressive Scenario
# County Totals

Annual Market Potential for Selected Target Markets - AGGRESSIVE SCENARIO
Number of Units (New and/or Rehab) by Tenure and Building Form
Alpena COUNTY, Michigan - 2016 - 2020

| AGGRESSIVE SCENARIO | Alpena COUNTY 71 Lifestyle Clusters | | | Alpena COUNTY Upscale Target Markets | | | Alpena COUNTY Moderate Target Markets | | |
|---|---|---|---|---|---|---|---|---|---|
| | Total | Owners | Renters | Total | Owners | Renters | Total | Owners | Renters |
| Total Housing Units | 1,385 | 297 | 1,088 | 128 | 19 | 109 | 675 | 8 | 667 |
| 1 \| Detached Houses | 670 | 290 | 380 | 69 | 19 | 50 | 78 | 1 | 77 |
| 2 \| Side-by-Side & Stacked | 40 | 0 | 40 | 4 | 0 | 4 | 31 | 0 | 31 |
| 3 \| Side-by-Side & Stacked | 81 | 0 | 81 | 6 | 0 | 6 | 66 | 0 | 66 |
| 4 \| Side-by-Side & Stacked | 44 | 0 | 44 | 4 | 0 | 4 | 36 | 0 | 36 |
| 5-9 \| Townhse., Live-Work | 203 | 0 | 203 | 21 | 0 | 21 | 147 | 0 | 147 |
| 10-19 \| Multiplex: Small | 72 | 1 | 71 | 7 | 0 | 7 | 64 | 1 | 63 |
| 20-49 \| Multiplex: Large | 102 | 1 | 101 | 5 | 0 | 5 | 95 | 1 | 94 |
| 50-99 \| Midrise: Small | 74 | 2 | 72 | 3 | 0 | 3 | 70 | 2 | 68 |
| 100+ \| Midrise: Large | 99 | 3 | 96 | 9 | 0 | 9 | 88 | 3 | 85 |
| Total Units | 1,385 | 297 | 1,088 | 128 | 19 | 109 | 675 | 8 | 667 |
| Detached | 670 | 290 | 380 | 69 | 19 | 50 | 78 | 1 | 77 |
| Attached | 715 | 7 | 708 | 59 | 0 | 59 | 597 | 7 | 590 |

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Notes: Not intended to imply absolutes or exclusive building formats, and may be qualified for unique projects.

Annual Market Potential for Selected Target Markets - AGGRESSIVE SCENARIO
Number of Units (New and/or Rehab) by Tenure and Building Form
Alpena COUNTY, Michigan - 2016 - 2020

Exhibit D.2

| AGGRESSIVE SCENARIO (Per In-Migration Only) | Total 71 Lifestyle Clusters | Upscale Target Markets | Moderate Target Markets | Full Pockets Empty Nests \| E19 | Status Seeking Singles \| G24 | Wired for Success \| K37 | Bohem-ian Groove \| K40 | Full Steam Ahead \| O50 | Digital Depend-ents \| O51 | Urban Ambit-ion \| O52 | Striving Single Scene \| O54 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Target Market - Level | All 71 | Upscale | Moderate | U | U | U | U | U | U | U | U |
| Year of Data | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 |
| Alpena COUNTY - Total | 1,385 | 128 | 675 | 0 | 0 | 0 | 20 | 16 | 92 | 0 | 0 |
| Alpena COUNTY - Owners | 297 | 19 | 8 | 0 | 0 | 0 | 0 | 0 | 19 | 0 | 0 |
| 1 \| Detached Houses | 290 | 19 | 1 | 0 | 0 | 0 | 0 | 0 | 19 | 0 | 0 |
| 2 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 4 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 5-9 \| Townhse., Live-Work | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10-19 \| Multiplex: Small | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 20-49 \| Multiplex: Large | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 50-99 \| Midrise: Small | 2 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 100+ \| Midrise: Large | 3 | 0 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Alpena COUNTY - Renters | 1,088 | 109 | 667 | 0 | 0 | 0 | 20 | 16 | 73 | 0 | 0 |
| 1 \| Detached Houses | 380 | 50 | 77 | 0 | 0 | 0 | 3 | 0 | 47 | 0 | 0 |
| 2 \| Side-by-Side & Stacked | 40 | 4 | 31 | 0 | 0 | 0 | 1 | 0 | 3 | 0 | 0 |
| 3 \| Side-by-Side & Stacked | 81 | 6 | 66 | 0 | 0 | 0 | 2 | 0 | 4 | 0 | 0 |
| 4 \| Side-by-Side & Stacked | 44 | 4 | 36 | 0 | 0 | 0 | 2 | 0 | 2 | 0 | 0 |
| 5-9 \| Townhse., Live-Work | 203 | 21 | 147 | 0 | 0 | 0 | 6 | 0 | 15 | 0 | 0 |
| 10-19 \| Multiplex: Small | 71 | 7 | 63 | 0 | 0 | 0 | 2 | 4 | 1 | 0 | 0 |
| 20-49 \| Multiplex: Large | 101 | 5 | 94 | 0 | 0 | 0 | 1 | 3 | 1 | 0 | 0 |
| 50-99 \| Midrise: Small | 72 | 3 | 68 | 0 | 0 | 0 | 1 | 2 | 0 | 0 | 0 |
| 100+ \| Midrise: Large | 96 | 9 | 85 | 0 | 0 | 0 | 2 | 6 | 1 | 0 | 0 |

Note: Due only to rounding, these figures might not sum exact and might not perfectly match summary tables in the narrative report.
Qualifiers: Houses may include rehabs of existing mansion-style houses, carriage-style expansions, and accessory dwelling units.
Duplexes (2), triplexes (3), and fourplexes (4) may include units that are either stacked or side-by-side, and may be subdivided houses.
Townhouses may include row houses and brownstones; and multiplexes may include bungalow courts and courtyard "apartments".
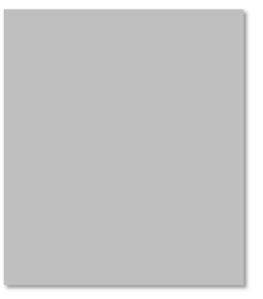
Annual Market Potential for Selected Target Markets - AGGRESSIVE SCENARIO
Number of Units (New and/or Rehab) by Tenure and Building Form
Alpena COUNTY, Michigan - 2016 - 2020

Exhibit D.3

| AGGRESSIVE SCENARIO (Per In-Migration Only) | Total 71 Lifestyle Clusters | Upscale Target Markets | Moderate Target Markets | Colleges Cafes \| O53 | Family Troopers \| O55 | Humble Begin-nings \| P61 | Senior Discount \| Q65 | Dare to Dream \| R66 | Hope for Tomor-row \| R67 | Tight Money \| S70 | Tough Times \| S71 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Target Market - Level | All 71 | Upscale | Moderate | M | M | M | M | M | M | M | M |
| Year of Data | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 |
| Alpena COUNTY - Total | 1,385 | 128 | 675 | 0 | 135 | 0 | 144 | 212 | 0 | 139 | 48 |
| Alpena COUNTY - Owners | 297 | 19 | 8 | 0 | 0 | 0 | 7 | 1 | 0 | 0 | 0 |
| 1 \| Detached Houses | 290 | 19 | 1 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 |
| 2 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 4 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 5-9 \| Townhse., Live-Work | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10-19 \| Multiplex: Small | 1 | 0 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 |
| 20-49 \| Multiplex: Large | 1 | 0 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 |
| 50-99 \| Midrise: Small | 2 | 0 | 2 | 0 | 0 | 0 | 2 | 0 | 0 | 0 | 0 |
| 100+ \| Midrise: Large | 3 | 0 | 3 | 0 | 0 | 0 | 3 | 0 | 0 | 0 | 0 |
| Alpena COUNTY - Renters | 1,088 | 109 | 667 | 0 | 135 | 0 | 137 | 211 | 0 | 139 | 48 |
| 1 \| Detached Houses | 380 | 50 | 77 | 0 | 15 | 0 | 0 | 57 | 0 | 3 | 2 |
| 2 \| Side-by-Side & Stacked | 40 | 4 | 31 | 0 | 6 | 0 | 0 | 18 | 0 | 6 | 1 |
| 3 \| Side-by-Side & Stacked | 81 | 6 | 66 | 0 | 14 | 0 | 1 | 41 | 0 | 9 | 1 |
| 4 \| Side-by-Side & Stacked | 44 | 4 | 36 | 0 | 10 | 0 | 1 | 19 | 0 | 5 | 1 |
| 5-9 \| Townhse., Live-Work | 203 | 21 | 147 | 0 | 38 | 0 | 3 | 71 | 0 | 32 | 3 |
| 10-19 \| Multiplex: Small | 71 | 7 | 63 | 0 | 14 | 0 | 18 | 1 | 0 | 22 | 8 |
| 20-49 \| Multiplex: Large | 101 | 5 | 94 | 0 | 14 | 0 | 33 | 1 | 0 | 37 | 9 |
| 50-99 \| Midrise: Small | 72 | 3 | 68 | 0 | 8 | 0 | 34 | 1 | 0 | 16 | 9 |
| 100+ \| Midrise: Large | 96 | 9 | 85 | 0 | 16 | 0 | 45 | 1 | 0 | 9 | 14 |

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Note: Due only to rounding, these figures might not sum exact and might not perfectly match summary tables in the narrative report.
Qualifiers: Houses may include rehabs of existing mansion-style houses, carriage-style expansions, and accessory dwelling units.
Duplexes (2), triplexes (3), and fourplexes (4) may include units that are either stacked or side-by-side, and may be subdivided houses.
Townhouses may include row houses and brownstones; and multiplexes may include bungalow courts and courtyard "apartments".

# E

# Aggressive Scenario
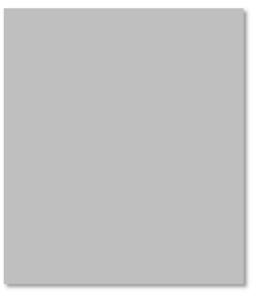# Places

Prepared by:

**LandUse**USA

Annual Market Potential for Selected Target Markets - AGGRESSIVE SCENARIO
Number of Units (New and/or Rehab) by Tenure and Building Form
Alpena COUNTY, Michigan - 2016 - 2020

| AGGRESSIVE SCENARIO | City of Alpena 71 Lifestyle Clusters | | | Ossineke CDP 71 Lifestyle Clusters | | |
|---|---|---|---|---|---|---|
| | Total | Owners | Renters | Total | Owners | Renters |
| Total Housing Units | 909 | 165 | 744 | 37 | 13 | 24 |
| 1 \| Detached Houses | 470 | 162 | 308 | 18 | 13 | 5 |
| 2 \| Side-by-Side & Stacked | 35 | 0 | 35 | 1 | 0 | 1 |
| 3 \| Side-by-Side & Stacked | 71 | 0 | 71 | 1 | 0 | 1 |
| 4 \| Side-by-Side & Stacked | 34 | 0 | 34 | 1 | 0 | 1 |
| 5-9 \| Townhse., Live-Work | 153 | 0 | 153 | 5 | 0 | 5 |
| 10-19 \| Multiplex: Small | 27 | 0 | 27 | 3 | 0 | 3 |
| 20-49 \| Multiplex: Large | 38 | 1 | 37 | 5 | 0 | 5 |
| 50-99 \| Midrise: Small | 33 | 1 | 32 | 2 | 0 | 2 |
| 100+ \| Midrise: Large | 48 | 1 | 47 | 1 | 0 | 1 |
| Total Units | 909 | 165 | 744 | 37 | 13 | 24 |
| Detached | 470 | 162 | 308 | 18 | 13 | 5 |
| Attached | 439 | 3 | 436 | 19 | 0 | 19 |

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Notes: Not intended to imply absolutes or exclusive building formats, and may be qualified for unique projects.

Annual Market Potential for Selected Target Markets - AGGRESSIVE SCENARIO
Number of Units (New and/or Rehab) by Tenure and Building Form
City of Alpena - Alpena COUNTY, Michigan - 2016 - 2020

| AGGRESSIVE SCENARIO (Per In-Migration Only) | Total 71 Lifestyle Clusters | Upscale Target Markets | Moderate Target Markets | Full Pockets Empty Nests \| E19 | Status Seeking Singles \| G24 | Wired for Success \| K37 | Bohem- ian Groove \| K40 | Full Steam Ahead \| O50 | Digital Depend- ents \| O51 | Urban Ambit- ion \| O52 | Striving Single Scene \| O54 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Target Market - Level | All 71 | Upscale | Moderate | U | U | U | U | U | U | U | U |
| Year of Data | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 |
| City of Alpena - Total | 909 | 50 | 443 | 0 | 0 | 0 | 18 | 0 | 34 | 0 | 0 |
| City of Alpena - Owners | 165 | 8 | 4 | 0 | 0 | 0 | 0 | 0 | 8 | 0 | 0 |
| 1 \| Detached Houses | 162 | 8 | 1 | 0 | 0 | 0 | 0 | 0 | 8 | 0 | 0 |
| 2 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 4 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 5-9 \| Townhse., Live-Work | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10-19 \| Multiplex: Small | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 20-49 \| Multiplex: Large | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 50-99 \| Midrise: Small | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 100+ \| Midrise: Large | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| City of Alpena - Renters | 744 | 42 | 439 | 0 | 0 | 0 | 18 | 0 | 26 | 0 | 0 |
| 1 \| Detached Houses | 308 | 20 | 80 | 0 | 0 | 0 | 3 | 0 | 17 | 0 | 0 |
| 2 \| Side-by-Side & Stacked | 35 | 2 | 27 | 0 | 0 | 0 | 1 | 0 | 1 | 0 | 0 |
| 3 \| Side-by-Side & Stacked | 71 | 3 | 60 | 0 | 0 | 0 | 2 | 0 | 1 | 0 | 0 |
| 4 \| Side-by-Side & Stacked | 34 | 2 | 29 | 0 | 0 | 0 | 1 | 0 | 1 | 0 | 0 |
| 5-9 \| Townhse., Live-Work | 153 | 10 | 110 | 0 | 0 | 0 | 5 | 0 | 5 | 0 | 0 |
| 10-19 \| Multiplex: Small | 27 | 2 | 25 | 0 | 0 | 0 | 2 | 0 | 0 | 0 | 0 |
| 20-49 \| Multiplex: Large | 37 | 1 | 34 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 |
| 50-99 \| Midrise: Small | 32 | 1 | 30 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 |
| 100+ \| Midrise: Large | 47 | 1 | 44 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 |

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Note: Due only to rounding, these figures might not sum exact and might not perfectly match summary tables in the narrative report.
Qualifiers: Houses may include rehabs of existing mansion-style houses, carriage-style expansions, and accessory dwelling units.
Duplexes (2), triplexes (3), and fourplexes (4) may include units that are either stacked or side-by-side, and may be subdivided houses.
Townhouses may include row houses and brownstones; and multiplexes may include bungalow courts and courtyard "apartments".

Annual Market Potential for Selected Target Markets - AGGRESSIVE SCENARIO
Number of Units (New and/or Rehab) by Tenure and Building Form
City of Alpena - Alpena COUNTY, Michigan - 2016 - 2020

Exhibit E.3

| AGGRESSIVE SCENARIO (Per In-Migration Only) | Total 71 Lifestyle Clusters | Upscale Target Markets | Moderate Target Markets | Colleges Cafes \| O53 | Family Troopers \| O55 | Humble Begin- nings \| P61 | Senior Discount \| Q65 | Dare to Dream \| R66 | Hope for Tomor- row \| R67 | Tight Money \| S70 | Tough Times \| S71 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Target Market - Level | All 71 | Upscale | Moderate | M | M | M | M | M | M | M | M |
| Year of Data | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 |
| City of Alpena - Total | 909 | 50 | 443 | 0 | 55 | 0 | 73 | 266 | 0 | 0 | 48 |
| City of Alpena - Owners | 165 | 8 | 4 | 0 | 0 | 0 | 4 | 1 | 0 | 0 | 0 |
| 1 \| Detached Houses | 162 | 8 | 1 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 |
| 2 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 4 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 5-9 \| Townhse., Live-Work | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10-19 \| Multiplex: Small | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 20-49 \| Multiplex: Large | 1 | 0 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 |
| 50-99 \| Midrise: Small | 1 | 0 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 |
| 100+ \| Midrise: Large | 1 | 0 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 |
| City of Alpena - Renters | 744 | 42 | 439 | 0 | 55 | 0 | 69 | 265 | 0 | 0 | 48 |
| 1 \| Detached Houses | 308 | 20 | 80 | 0 | 6 | 0 | 0 | 72 | 0 | 0 | 2 |
| 2 \| Side-by-Side & Stacked | 35 | 2 | 27 | 0 | 3 | 0 | 0 | 23 | 0 | 0 | 1 |
| 3 \| Side-by-Side & Stacked | 71 | 3 | 60 | 0 | 6 | 0 | 1 | 52 | 0 | 0 | 1 |
| 4 \| Side-by-Side & Stacked | 34 | 2 | 29 | 0 | 4 | 0 | 0 | 24 | 0 | 0 | 1 |
| 5-9 \| Townhse., Live-Work | 153 | 10 | 110 | 0 | 16 | 0 | 2 | 89 | 0 | 0 | 3 |
| 10-19 \| Multiplex: Small | 27 | 2 | 25 | 0 | 6 | 0 | 9 | 2 | 0 | 0 | 8 |
| 20-49 \| Multiplex: Large | 37 | 1 | 34 | 0 | 6 | 0 | 17 | 2 | 0 | 0 | 9 |
| 50-99 \| Midrise: Small | 32 | 1 | 30 | 0 | 3 | 0 | 17 | 1 | 0 | 0 | 9 |
| 100+ \| Midrise: Large | 47 | 1 | 44 | 0 | 6 | 0 | 23 | 1 | 0 | 0 | 14 |

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Note: Due only to rounding, these figures might not sum exact and might not perfectly match summary tables in the narrative report.
Qualifiers: Houses may include rehabs of existing mansion-style houses, carriage-style expansions, and accessory dwelling units.
Duplexes (2), triplexes (3), and fourplexes (4) may include units that are either stacked or side-by-side, and may be subdivided houses.
Townhouses may include row houses and brownstones; and multiplexes may include bungalow courts and courtyard "apartments".

Annual Market Potential for Selected Target Markets - AGGRESSIVE SCENARIO
Number of Units (New and/or Rehab) by Tenure and Building Form
Ossineke CDP - Alpena COUNTY, Michigan - 2016 - 2020

Exhibit E.4

| AGGRESSIVE SCENARIO (Per In-Migration Only) | Total 71 Lifestyle Clusters | Upscale Target Markets | Moderate Target Markets | Full Pockets Empty Nests \| E19 | Status Seeking Singles \| G24 | Wired for Success \| K37 | Bohem-ian Groove \| K40 | Full Steam Ahead \| O50 | Digital Depend-ents \| O51 | Urban Ambit-ion \| O52 | Striving Single Scene \| O54 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Target Market - Level | All 71 | Upscale | Moderate | U | U | U | U | U | U | U | U |
| Year of Data | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 |
| Ossineke CDP - Total | 37 | 9 | 18 | 0 | 0 | 0 | 1 | 0 | 10 | 0 | 0 |
| Ossineke CDP - Owners | 13 | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 0 | 0 |
| 1 \| Detached Houses | 13 | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 0 | 0 |
| 2 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 4 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 5-9 \| Townhse., Live-Work | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10-19 \| Multiplex: Small | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 20-49 \| Multiplex: Large | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 50-99 \| Midrise: Small | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 100+ \| Midrise: Large | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Ossineke CDP - Renters | 24 | 5 | 18 | 0 | 0 | 0 | 1 | 0 | 6 | 0 | 0 |
| 1 \| Detached Houses | 5 | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 0 | 0 |
| 2 \| Side-by-Side & Stacked | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 \| Side-by-Side & Stacked | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 4 \| Side-by-Side & Stacked | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 5-9 \| Townhse., Live-Work | 5 | 1 | 4 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 |
| 10-19 \| Multiplex: Small | 3 | 0 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 20-49 \| Multiplex: Large | 5 | 0 | 5 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 50-99 \| Midrise: Small | 2 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 100+ \| Midrise: Large | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Source: Results of a Target Market Analysis prepared exclusively by LandUse|USA © 2016 with all rights reserved.
Note: Due only to rounding, these figures might not sum exact and might not perfectly match summary tables in the narrative report.
Qualifiers: Houses may include rehabs of existing mansion-style houses, carriage-style expansions, and accessory dwelling units.
Duplexes (2), triplexes (3), and fourplexes (4) may include units that are either stacked or side-by-side, and may be subdivided houses.
Townhouses may include row houses and brownstones; and multiplexes may include bungalow courts and courtyard "apartments".

Annual Market Potential for Selected Target Markets - AGGRESSIVE SCENARIO
Number of Units (New and/or Rehab) by Tenure and Building Form
Ossineke CDP - Alpena COUNTY, Michigan - 2016 - 2020

Exhibit E.5

| AGGRESSIVE SCENARIO (Per In-Migration Only) | Total 71 Lifestyle Clusters | Upscale Target Markets | Moderate Target Markets | Colleges Cafes \| O53 | Family Troopers \| O55 | Humble Begin- nings \| P61 | Senior Discount \| Q65 | Dare to Dream \| R66 | Hope for Tomor- row \| R67 | Tight Money \| S70 | Tough Times \| S71 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Target Market - Level | All 71 | Upscale | Moderate | M | M | M | M | M | M | M | M |
| Year of Data | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 |
| Ossineke CDP - Total | 37 | 9 | 18 | 0 | 0 | 0 | 0 | 0 | 0 | 17 | 0 |
| Ossineke CDP - Owners | 13 | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 1 \| Detached Houses | 13 | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 4 \| Side-by-Side & Stacked | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 5-9 \| Townhse., Live-Work | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 10-19 \| Multiplex: Small | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 20-49 \| Multiplex: Large | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 50-99 \| Midrise: Small | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 100+ \| Midrise: Large | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Ossineke CDP - Renters | 24 | 5 | 18 | 0 | 0 | 0 | 0 | 0 | 0 | 17 | 0 |
| 1 \| Detached Houses | 5 | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2 \| Side-by-Side & Stacked | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 |
| 3 \| Side-by-Side & Stacked | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 |
| 4 \| Side-by-Side & Stacked | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 |
| 5-9 \| Townhse., Live-Work | 5 | 1 | 4 | 0 | 0 | 0 | 0 | 0 | 0 | 4 | 0 |
| 10-19 \| Multiplex: Small | 3 | 0 | 3 | 0 | 0 | 0 | 0 | 0 | 0 | 3 | 0 |
| 20-49 \| Multiplex: Large | 5 | 0 | 5 | 0 | 0 | 0 | 0 | 0 | 0 | 5 | 0 |
| 50-99 \| Midrise: Small | 2 | 0 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 0 |
| 100+ \| Midrise: Large | 1 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 |

Source: Results of a Target Market Analysis prepared exclusively by LandUse|USA © 2016 with all rights reserved.
Note: Due only to rounding, these figures might not sum exact and might not perfectly match summary tables in the narrative report.
Qualifiers: Houses may include rehabs of existing mansion-style houses, carriage-style expansions, and accessory dwelling units.
Duplexes (2), triplexes (3), and fourplexes (4) may include units that are either stacked or side-by-side, and may be subdivided houses.
Townhouses may include row houses and brownstones; and multiplexes may include bungalow courts and courtyard "apartments".

# F₁

## Contract Rents
## County and Places

# Upscale Target Markets for Missing Middle Housing Formats
## Stacked by Contract Rent Brackets
## Averages for the State of Michigan - 2016



Legend

- ■ $2,000+
- ■ $1,500 - $1,999
- ■ $1,250 - $1,499
- ■ $1,000 - $1,249
- ■ $900 - $999
- ■ $800 - $899
- ■ $700 - $799
- ■ $600 - $699
- ■ $500 - $599
- ■ <$500

Share of All Renter Households

100%
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%

Full Pocket Empty Nest E19 | Status Seeking Singles G24 | Wired for Success K37 | Bohemian Groove K40 | Full Steam Ahead O50 | Digital Dependents O51 | Urban Ambition O52 | Striving Single Scene O54

Contract Rent Brackets | Existing Households by Upscale Target Market
Alpena County | Northeast Michigan Prosperity Region 3 | Year 2015

| Contract Rent Brackets | All 71 Mosaic Lifestyle Clusters | Full Pocket Empty Nest E19 | Status Seeking Singles G24 | Wired for Success K37 | Bohemian Groove K40 | Full Steam Ahead O50 | Digital Dependents O51 | Urban Ambition O52 | Striving Single Scene O54 |
|---|---|---|---|---|---|---|---|---|---|
| <$500 | 6.0% | 0.5% | 0.9% | 4.9% | 6.6% | 9.8% | 5.3% | 5.4% | 6.7% |
| $500 - $599 | 18.6% | 6.0% | 8.0% | 15.6% | 24.8% | 35.3% | 24.3% | 30.9% | 26.9% |
| $600 - $699 | 12.9% | 7.5% | 8.9% | 10.8% | 19.8% | 18.2% | 20.7% | 22.6% | 18.4% |
| $700 - $799 | 12.5% | 11.5% | 16.8% | 13.7% | 18.5% | 12.9% | 20.0% | 18.2% | 12.6% |
| $800 - $899 | 10.9% | 13.4% | 20.2% | 11.7% | 12.4% | 7.7% | 13.9% | 10.9% | 9.0% |
| $900 - $999 | 8.0% | 10.6% | 14.2% | 9.2% | 7.4% | 4.1% | 8.2% | 5.6% | 7.0% |
| $1,000 - $1,249 | 2.9% | 4.5% | 4.6% | 3.2% | 1.9% | 1.0% | 1.9% | 1.3% | 1.9% |
| $1,250 - $1,499 | 11.8% | 19.9% | 15.1% | 13.5% | 5.2% | 3.4% | 4.0% | 3.1% | 6.8% |
| $1,500 - $1,999 | 8.2% | 14.7% | 7.9% | 8.7% | 2.0% | 1.4% | 1.3% | 1.4% | 3.8% |
| $2,000+ | 8.2% | 11.5% | 3.5% | 8.9% | 1.5% | 6.4% | 0.4% | 0.7% | 6.9% |
| Summation | | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Median | $440 | $699 | $597 | $597 | $456 | $450 | $446 | $428 | $503 |

Source: Underlying data provided by Experian Decision Analytics and the American Community Survey (ACS) with 1-yr estimates through 2014. Analysis, forecasts, and exhibit prepared exclusively by LandUse|USA; 2016 © with all rights reserved.
These rents are for a base year of 2015, and have not yet been forecast to 2016 or "boosted" for the market analysis and model.

Annual Market Potential for Selected Target Markets - AGGRESSIVE SCENARIO
Number of Units (New and/or Rehab) by Contract Rent Bracket
Alpena COUNTY, Michigan - 2016 - 2020

Exhibit F1.3

| AGGRESSIVE SCENARIO (Per In-Migration Only) | Total 71 Lifestyle Clusters | Upscale Target Markets | Moderate Target Markets | Full Pockets Empty Nests \| E19 | Status Seeking Singles \| G24 | Wired for Success \| K37 | Bohem-ian Groove \| K40 | Full Steam Ahead \| O50 | Digital Depend-ents \| O51 | Urban Ambit-ion \| O52 | Striving Single Scene \| O54 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Target Market | All 71 | Upscale | Moderate | U | U | U | U | U | U | U | U |
| Year of Data | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 |
| Alpena COUNTY - Total | 1,361 | 125 | 672 | 0 | 0 | 0 | 20 | 16 | 92 | 0 | 0 |
| Alpena COUNTY - Renters | 1,082 | 108 | 666 | 0 | 0 | 0 | 20 | 16 | 73 | 0 | 0 |
| <$500 | 156 | 7 | 105 | 0 | 0 | 0 | 1 | 2 | 4 | 0 | 0 |
| $500 - $599 | 388 | 29 | 238 | 0 | 0 | 0 | 5 | 6 | 18 | 0 | 0 |
| $600 - $699 | 218 | 22 | 128 | 0 | 0 | 0 | 4 | 3 | 15 | 0 | 0 |
| $700 - $799 | 137 | 21 | 77 | 0 | 0 | 0 | 4 | 2 | 15 | 0 | 0 |
| $800 - $899 | 80 | 13 | 47 | 0 | 0 | 0 | 2 | 1 | 10 | 0 | 0 |
| $900 - $999 | 44 | 8 | 27 | 0 | 0 | 0 | 1 | 1 | 6 | 0 | 0 |
| $1,000 - $1,249 | 8 | 1 | 6 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 |
| $1,250 - $1,499 | 27 | 5 | 18 | 0 | 0 | 0 | 1 | 1 | 3 | 0 | 0 |
| $1,500 - $1,999 | 12 | 1 | 9 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 |
| $2,000+ | 12 | 1 | 11 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 |
| Summation | 1,082 | 108 | 666 | 0 | 0 | 0 | 18 | 17 | 73 | 0 | 0 |
| Med. Contract Rent | $630 | -- | -- | $839 | $716 | $716 | $548 | $541 | $535 | $513 | $604 |

Source: Results of a Target Market Analysis prepared exclusively by LandUse|USA © 2016 with all rights reserved.

Contract rent typically excludes some or all utilties and extra fees for deposits, parking, pets, security, memberships, etc.

Note: Due only to rounding, these figures might not sum exact and might not perfectly match summary tables in the narrative report.

Median Contract Rents include a +20% boost and assumes new-builds; quality rehabs; and housing market recovery.

# Moderate Target Markets for Missing Middle Housing Formats
## Stacked by Contract Rent Brackets
## Averages for the State of Michigan - 2016



**Legend**

- ■ $2,000+
- ■ $1,500 - $1,999
- ■ $1,250 - $1,499
- ■ $1,000 - $1,249
- ■ $900 - $999
- ■ $800 - $899
- ■ $700 - $799
- ■ $600 - $699
- ■ $500 - $599
- ■ <$500

*Y-axis: Share of All Renter Households*

X-axis categories:
- Colleges Cafes O53
- Family Troopers O55
- Humble Beginnings P61
- Senior Discounts Q65
- Dare to Dream R66
- Hope for Tomorrow R67
- Tight Money S70
- Tough Times S71

## Contract Rent Brackets | Existing Households by Moderate Target Market
## Alpena County | Northeast Michigan Prosperity Region 3 | Year 2015

| Contract Rent Brackets | All 71 Mosaic Lifestyle Clusters | Colleges Cafes O53 | Family Troopers O55 | Humble Beginnings P61 | Senior Discounts Q65 | Dare to Dream R66 | Hope for Tomorrow R67 | Tight Money S70 | Tough Times S71 |
|---|---|---|---|---|---|---|---|---|---|
| <$500 | 6.0% | 4.6% | 9.3% | 24.2% | 17.1% | 15.6% | 20.6% | 20.8% | 15.5% |
| $500 - $599 | 18.6% | 22.5% | 30.0% | 30.2% | 32.2% | 43.9% | 49.2% | 30.7% | 37.7% |
| $600 - $699 | 12.9% | 18.5% | 20.9% | 14.0% | 16.3% | 19.8% | 18.5% | 20.2% | 17.6% |
| $700 - $799 | 12.5% | 17.7% | 14.9% | 6.9% | 12.3% | 10.6% | 6.4% | 10.3% | 8.2% |
| $800 - $899 | 10.9% | 13.9% | 10.3% | 5.6% | 7.6% | 4.8% | 2.5% | 7.3% | 5.7% |
| $900 - $999 | 8.0% | 7.3% | 5.5% | 3.1% | 4.4% | 2.7% | 1.2% | 4.2% | 3.8% |
| $1,000 - $1,249 | 2.9% | 2.4% | 1.6% | 1.1% | 1.2% | 0.6% | 0.3% | 0.9% | 1.0% |
| $1,250 - $1,499 | 11.8% | 7.1% | 3.9% | 3.9% | 3.6% | 1.4% | 0.8% | 2.3% | 3.5% |
| $1,500 - $1,999 | 8.2% | 3.2% | 2.1% | 2.2% | 1.8% | 0.4% | 0.3% | 1.5% | 2.0% |
| $2,000+ | 8.2% | 2.8% | 1.5% | 8.8% | 3.5% | 0.2% | 0.1% | 1.7% | 5.0% |
| Summation | | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Median | $440 | $488 | $434 | $447 | $423 | $367 | $342 | $395 | $427 |

Source: Underlying data provided by Experian Decision Analytics and the American Community Survey (ACS) with 1-yr estimates through 2014. Analysis, forecasts, and exhibit prepared exclusively by LandUse|USA; 2016 © with all rights reserved.

These rents are for a base year of 2015, and have not yet been forecast to 2016 or "boosted" for the market analysis and model.

Annual Market Potential for Selected Target Markets - AGGRESSIVE SCENARIO
Number of Units (New and/or Rehab) by Contract Rent Bracket
Alpena COUNTY, Michigan - 2016 - 2020

| AGGRESSIVE SCENARIO (Per In-Migration Only) | Total 71 Lifestyle Clusters | Upscale Target Markets | Moderate Target Markets | Colleges Cafes \| O53 | Family Troopers \| O55 | Humble Begin- nings \| P61 | Senior Discount \| Q65 | Dare to Dream \| R66 | Hope for Tomor- row \| R67 | Tight Money \| S70 | Tough Times \| S71 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Target Market | All 71 | Upscale | Moderate | M | M | M | M | M | M | M | M |
| Year of Data | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 |
| Alpena COUNTY - Total | 1,361 | 125 | 672 | 0 | 135 | 0 | 144 | 212 | 0 | 139 | 48 |
| Alpena COUNTY - Renters | 1,082 | 108 | 666 | 0 | 135 | 0 | 137 | 211 | 0 | 139 | 48 |
| <$500 | 156 | 7 | 105 | 0 | 13 | 0 | 23 | 33 | 0 | 29 | 7 |
| $500 - $599 | 388 | 29 | 238 | 0 | 40 | 0 | 44 | 93 | 0 | 43 | 18 |
| $600 - $699 | 218 | 22 | 128 | 0 | 28 | 0 | 22 | 42 | 0 | 28 | 8 |
| $700 - $799 | 137 | 21 | 77 | 0 | 20 | 0 | 17 | 22 | 0 | 14 | 4 |
| $800 - $899 | 80 | 13 | 47 | 0 | 14 | 0 | 10 | 10 | 0 | 10 | 3 |
| $900 - $999 | 44 | 8 | 27 | 0 | 7 | 0 | 6 | 6 | 0 | 6 | 2 |
| $1,000 - $1,249 | 8 | 1 | 6 | 0 | 2 | 0 | 2 | 1 | 0 | 1 | 0 |
| $1,250 - $1,499 | 27 | 5 | 18 | 0 | 5 | 0 | 5 | 3 | 0 | 3 | 2 |
| $1,500 - $1,999 | 12 | 1 | 9 | 0 | 3 | 0 | 2 | 1 | 0 | 2 | 1 |
| $2,000+ | 12 | 1 | 11 | 0 | 2 | 0 | 5 | 0 | 0 | 2 | 2 |
| Summation | 1,082 | 108 | 666 | 0 | 134 | 0 | 136 | 211 | 0 | 138 | 47 |
| Med. Contract Rent | $630 | -- | -- | $585 | $521 | $537 | $508 | $440 | $410 | $474 | $513 |

Source: Results of a Target Market Analysis prepared exclusively by LandUse|USA © 2016 with all rights reserved.

Contract rent typically excludes some or all utilties and extra fees for deposits, parking, pets, security, memberships, etc.

Note: Due only to rounding, these figures might not sum exact and might not perfectly match summary tables in the narrative report.

Median Contract Rents include a +20% boost and assumes new-builds; quality rehabs; and housing market recovery.

Market Parameters and Forecasts - Median Contract Rent
Alpena County and Selected Communities - Michigan Prosperity Region 3

| Order | County Name | 2010 ACS 1-yr Median Contract Rent | 2011 ACS 1-yr Median Contract Rent | 2012 ACS 1-yr Median Contract Rent | 2013 ACS 1-yr Median Contract Rent | 2014 Estimate Median Contract Rent | 2016 Forecast Median Contract Rent | 2020 Forecast Median Contract Rent |
|---|---|---|---|---|---|---|---|---|
| | Alpena Co. | $401 | $402 | $417 | $428 | $437 | $457 | $486 |
| 1 | Alpena City | $395 | $395 | $417 | $432 | $445 | $473 | $515 |
| 2 | Ossineke CDP | $425 | $442 | $442 | $442 | $448 | $460 | $477 |

Source: Underlying data provided by the U.S. Decennial Census and the American Community Survey
for 2010 - 2014 (1- and 5-year estimates). Analysis, interpolations, and forecasts by LandUse|USA; 2016.
Contract rent excludes utilities and extra fees (security deposits, pets, storage, etc.)

## Market Parameters - Contract and Gross Rents
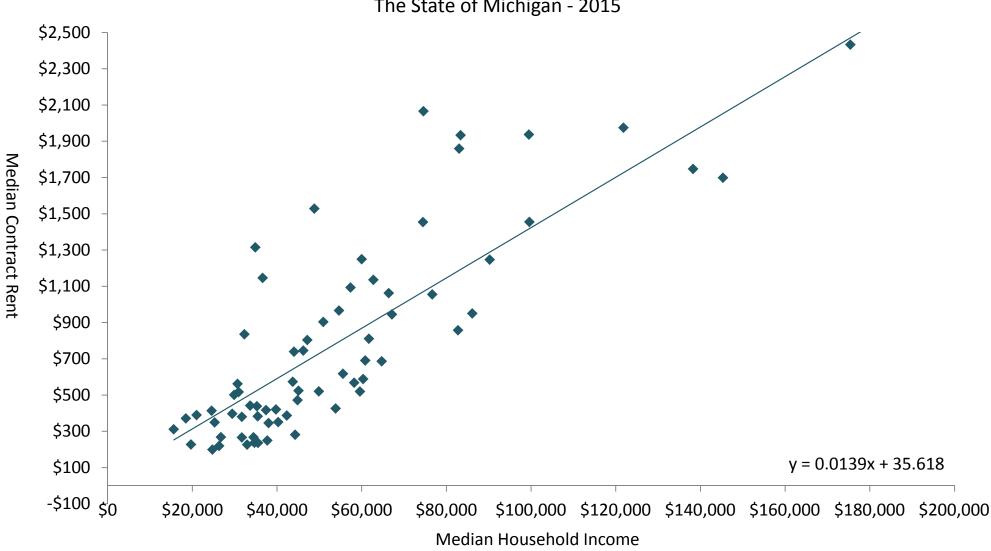## Counties in Northeast Michigan Prosperity Region 3 - Year 2016

| | Geography | Median Household Income (Renters) | Monthly Median Contract Rent | Monthly Median Gross Rent | Gross v. Contract Rent Index | Monthly Utilities and Fees | Fees as a Share of Gross Rent | Gross Rent as a Share of Renter Income |
|---|---|---|---|---|---|---|---|---|
| | The State of Michigan | $28,834 | $658 | $822 | 1.25 | $164 | 20.0% | 34.2% |
| | Prosperity Region 3 | | | | | | | |
| 1 | Alcona County | $25,343 | $437 | $664 | 1.52 | $226 | 34.1% | 31.4% |
| 2 | Alpena County | $21,242 | $459 | $593 | 1.29 | $134 | 22.5% | 33.5% |
| 3 | Cheboygan County | $24,390 | $503 | $644 | 1.28 | $141 | 21.9% | 31.7% |
| 4 | Crawford County | $30,780 | $599 | $785 | 1.31 | $187 | 23.8% | 30.6% |
| 5 | Iosco County | $28,671 | $456 | $625 | 1.37 | $169 | 27.0% | 26.2% |
| 6 | Montmorency County | $20,001 | $489 | $669 | 1.37 | $180 | 26.9% | 40.1% |
| 7 | Ogemaw County | $20,146 | $504 | $686 | 1.36 | $182 | 26.6% | 40.9% |
| 8 | Oscoda County | $17,820 | $492 | $646 | 1.31 | $154 | 23.8% | 43.5% |
| 9 | Otsego County | $28,135 | $556 | $724 | 1.30 | $168 | 23.2% | 30.9% |
| 10 | Presque Isle County | $28,923 | $489 | $625 | 1.28 | $137 | 21.9% | 26.0% |
| 11 | Roscommon County | $22,979 | $528 | $742 | 1.40 | $213 | 28.7% | 38.7% |

Source: Underlying data provided by the U.S. Census and American Community Survey (ACS) through 2014.
Analysis, forecasts, and exhibit prepared by LandUse|USA; 2016 ©.

# Median Contract Rent v. Median Household Income
## 71 Lifestyle Clusters (Mosaic|USA)
## The State of Michigan - 2015



$y = 0.0139x + 35.618$

Median Contract Rent

Median Household Income

# Cash or Contract Rents by Unit Size - Attached Units
## Forecast for New-Builds, Rehabs, and Significant Remodels Only
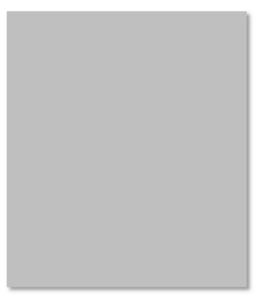## Northeast Michigan Prosperity Region 3 - Year 2016

| Total Sq. Ft. | Cheboygan County Presque Isle County Alpena County | | Alcona County Iosco County | | Otsego County Crawford County Roscommon County | | Montmorency County Ogemaw County | |
|---|---|---|---|---|---|---|---|---|
| | Rent per Sq. Ft. | Cash Rent | Rent per Sq. Ft. | Cash Rent | Rent per Sq. Ft. | Cash Rent | Rent per Sq. Ft. | Cash Rent |
| 500 | $1.09 | $545 | $1.19 | $595 | $1.07 | $535 | $1.22 | $610 |
| 600 | $1.01 | $605 | $1.12 | $670 | $1.01 | $605 | $1.09 | $655 |
| 700 | $0.93 | $655 | $1.06 | $740 | $0.95 | $665 | $0.98 | $690 |
| 800 | $0.87 | $695 | $1.01 | $805 | $0.91 | $725 | $0.89 | $710 |
| 900 | $0.81 | $735 | $0.96 | $865 | $0.86 | $775 | $0.80 | $725 |
| 1,000 | $0.76 | $765 | $0.92 | $920 | $0.83 | $825 | $0.73 | $730 |
| 1,100 | $0.72 | $790 | $0.88 | $970 | $0.79 | $870 | *$0.67* | *$735* |
| 1,200 | $0.68 | $815 | $0.85 | $1,015 | $0.76 | $915 | *$0.62* | *$740* |
| 1,300 | $0.64 | $830 | $0.82 | $1,060 | $0.73 | $955 | *$0.57* | *$745* |
| 1,400 | $0.60 | $845 | $0.79 | $1,100 | $0.71 | $990 | *$0.54* | *$750* |
| 1,500 | $0.57 | $860 | $0.76 | $1,140 | $0.68 | $1,025 | *$0.50* | *$755* |
| 1,600 | $0.54 | $865 | $0.74 | $1,175 | $0.66 | $1,055 | *$0.48* | *$760* |
| 1,700 | $0.51 | $870 | $0.71 | $1,210 | $0.64 | $1,085 | *$0.45* | *$765* |
| 1,800 | $0.49 | $875 | $0.69 | $1,240 | $0.62 | $1,110 | *$0.43* | *$770* |
| 1,900 | *$0.46* | *$880* | $0.67 | $1,270 | $0.60 | $1,135 | *$0.41* | *$775* |
| 2,000 | *$0.44* | *$885* | $0.65 | $1,295 | $0.58 | $1,160 | *$0.39* | *$780* |

Source: Estimates and forecasts prepared exclusively by LandUse|USA; 2016 ©.
Underlying data gathered by LandUse|USA; 2015.
Based on market observations, phone surveys, and assessor's records.
Figures that are italicized with small fonts have relatively high variances in statistical reliability.

# F₂

# Home Values
# County and Places

Prepared by:

LandUseUSA

Prepared for:

Northeast Michigan Prosperity Region 3

Michigan State Housing Development Authority

MSHDA
MICHIGAN STATE HOUSING
DEVELOPMENT AUTHORITY

Annual Market Potential for Selected Target Markets - AGGRESSIVE SCENARIO
Number of Units (New and/or Rehab) by Home Value Bracket
Alpena COUNTY, Michigan - 2016 - 2020

| AGGRESSIVE SCENARIO (Per In-Migration Only) | Total 71 Lifestyle Clusters | Upscale Target Markets | Moderate Target Markets | Full Pockets Empty Nests \| E19 | Status Seeking Singles \| G24 | Wired for Success \| K37 | Bohem-ian Groove \| K40 | Full Steam Ahead \| O50 | Digital Depend-ents \| O51 | Urban Ambit-ion \| O52 | Striving Single Scene \| O54 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Target Market | All 71 | Upscale | Moderate | U | U | U | U | U | U | U | U |
| Year of Data | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 |
| Alpena COUNTY - Total | 1,361 | 125 | 672 | 0 | 0 | 0 | 20 | 16 | 92 | 0 | 0 |
| Alpena COUNTY - Owners | 279 | 17 | 6 | 0 | 0 | 0 | 0 | 0 | 19 | 0 | 0 |
| < $50,000 | 46 | 2 | 2 | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 0 |
| $50 - $74,999 | 77 | 4 | 2 | 0 | 0 | 0 | 0 | 0 | 4 | 0 | 0 |
| $75 - $99,999 | 63 | 4 | 1 | 0 | 0 | 0 | 0 | 0 | 4 | 0 | 0 |
| $100 - $149,999 | 40 | 3 | 1 | 0 | 0 | 0 | 0 | 0 | 3 | 0 | 0 |
| $150 - $174,999 | 24 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 0 |
| $175 - $199,999 | 13 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 |
| $200 - $249,999 | 9 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 |
| $250 - $299,999 | 5 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| $300 - $349,999 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| $350 - $399,999 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| $400 - $499,999 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| $500 - $749,999 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| $750,000+ | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Summation | 279 | 17 | 6 | 0 | 0 | 0 | 0 | 0 | 17 | 0 | 0 |
| Med. Home Value | $86,810 | -- | -- | $327,545 | $235,919 | $253,352 | $132,117 | $152,308 | $120,543 | $106,896 | $187,017 |

Source: Results of a Target Market Analysis prepared exclusively by LandUse|USA © 2016 with all rights reserved.
Note: Due only to rounding, these figures might not sum exact and might not perfectly match summary tables in the narrative report.
Median Home Values include a +20% boost and assumes new-builds; quality rehabs; and housing market recovery.

Annual Market Potential for Selected Target Markets - AGGRESSIVE SCENARIO
Number of Units (New and/or Rehab) by Home Value Bracket
Alpena COUNTY, Michigan - 2016 - 2020

| AGGRESSIVE SCENARIO (Per In-Migration Only) | Total 71 Lifestyle Clusters | Upscale Target Markets | Moderate Target Markets | Colleges Cafes \| O53 | Family Troopers \| O55 | Humble Begin-nings \| P61 | Senior Discount \| Q65 | Dare to Dream \| R66 | Hope for Tomor-row \| R67 | Tight Money \| S70 | Tough Times \| S71 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Target Market | All 71 | Upscale | Moderate | M | M | M | M | M | M | M | M |
| Year of Data | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 | 2015 |
| Alpena COUNTY - Total | 1,361 | 125 | 672 | 0 | 135 | 0 | 144 | 212 | 0 | 139 | 48 |
| Alpena COUNTY - Owners | 279 | 17 | 6 | 0 | 0 | 0 | 7 | 1 | 0 | 0 | 0 |
| < $50,000 | 46 | 2 | 2 | 0 | 0 | 0 | 2 | 0 | 0 | 0 | 0 |
| $50 - $74,999 | 77 | 4 | 2 | 0 | 0 | 0 | 2 | 0 | 0 | 0 | 0 |
| $75 - $99,999 | 63 | 4 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 |
| $100 - $149,999 | 40 | 3 | 1 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 |
| $150 - $174,999 | 24 | 2 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| $175 - $199,999 | 13 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| $200 - $249,999 | 9 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| $250 - $299,999 | 5 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| $300 - $349,999 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| $350 - $399,999 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| $400 - $499,999 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| $500 - $749,999 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| $750,000+ | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Summation | 279 | 17 | 6 | 0 | 0 | 0 | 6 | 0 | 0 | 0 | 0 |
| Med. Home Value | $86,810 | -- | -- | $156,925 | $116,911 | $158,822 | $120,811 | $65,859 | $51,614 | $97,114 | $125,566 |

Source: Results of a Target Market Analysis prepared exclusively by LandUse|USA © 2016 with all rights reserved.
Note: Due only to rounding, these figures might not sum exact and might not perfectly match summary tables in the narrative report.
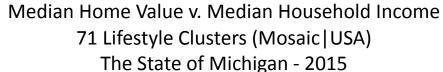Median Home Values include a +20% boost and assumes new-builds; quality rehabs; and housing market recovery.
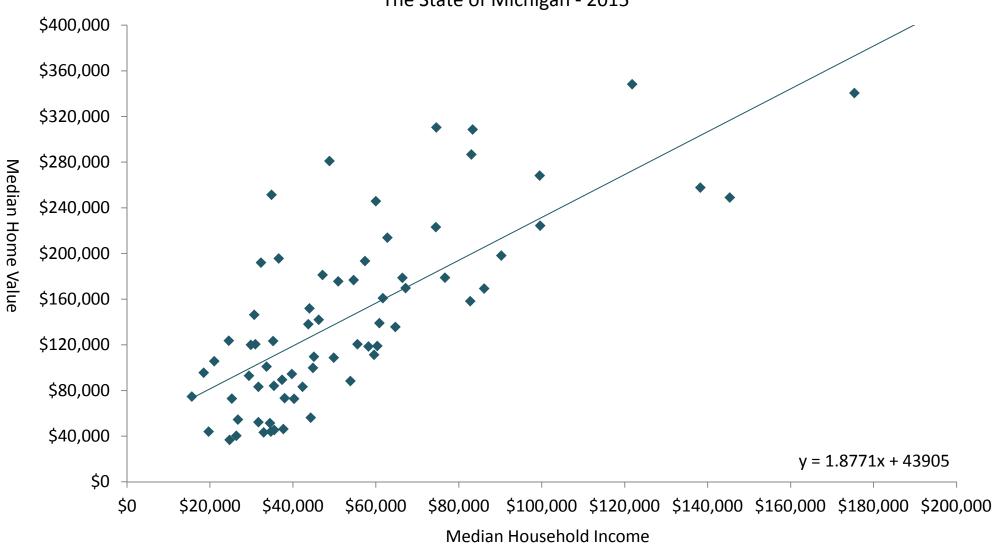
Market Parameters and Forecasts - Median Home Value
Alpena County and Selected Communities - Michigan Prosperity Region 3

| Order | County Name | 2010 ACS 1-yr Median Home Value | 2011 ACS 1-yr Median Home Value | 2012 ACS 1-yr Median Home Value | 2013 ACS 1-yr Median Home Value | 2014 Estimate Median Home Value | 2016 Forecast Median Home Value | 2020 Forecast Median Home Value |
|---|---|---|---|---|---|---|---|---|
| | Alpena Co. | $104,800 | $102,800 | $101,600 | $96,400 | $97,364 | $99,321 | $102,131 |
| | | | | | | | | |
| 1 | Alpena City | $87,800 | $84,400 | $82,000 | $77,500 | $78,275 | $79,848 | $82,108 |
| 2 | Ossineke CDP | $87,100 | $88,900 | $84,600 | $74,900 | $75,649 | $77,170 | $79,353 |

Source: Underlying data provided by the U.S. Decennial Census and the American Community Survey
for 2010 - 2014 (1- and 5-year estimates). Analysis, interpolations, and forecasts by LandUse|USA; 2016.

# Median Home Value v. Median Household Income
## 71 Lifestyle Clusters (Mosaic|USA)
## The State of Michigan - 2015



$y = 1.8771x + 43905$

Median Home Value

Median Household Income

Market Parameters and Forecasts - Median Household Income
Alpena County and Selected Communities - Michigan Prosperity Region 3

| Order | County Name | 2010 ACS 1-yr Median Household Income | 2011 ACS 1-yr Median Household Income | 2012 ACS 1-yr Median Household Income | 2013 ACS 1-yr Median Household Income | 2014 Estimate Median Household Income | 2016 Forecast Median Household Income | 2020 Forecast Median Household Income |
|---|---|---|---|---|---|---|---|---|
| | Alpena Co. | $36,695 | $38,081 | $38,900 | $38,016 | $38,479 | $39,423 | $40,785 |
| 1 | Alpena City | $31,463 | $31,805 | $33,682 | $33,311 | $33,717 | $34,544 | $35,737 |
| 2 | Ossineke CDP | $44,167 | $42,250 | $39,167 | $34,053 | $34,468 | $35,313 | $36,533 |

Source: Underlying data provided by the U.S. Decennial Census and the American Community Survey
for 2010 - 2014 (1- and 5-year estimates). Analysis, interpolations, and forecasts by LandUse|USA; 2016.

Total Investment Per Approved Building Permits
Alpena County, Michigan - 2000 through 2014

| Year | Units Detached (Single-Fam.) | Investment Detached (Single-Fam.) | Invest./Unit Detached (Single-Fam.) | Units Attached (Multi-Fam) | Investment Attached (Multi-Fam) | Invest./Unit Attached (Multi-Fam) | Detach. v. Attach. Cost Index |
|---|---|---|---|---|---|---|---|
| 2014 | 18 | $3,298,474 | $183,200 | 5 | $385,000 | $77,000 | 0.42 |
| 2013 | 18 | $3,689,474 | $205,000 | 4 | $265,000 | $66,300 | 0.32 |
| 2012 | 20 | $2,502,985 | $125,100 | 2 | $84,760 | $42,400 | 0.34 |
| 2011 | 11 | $1,741,548 | $158,300 | -- | -- | -- | -- |
| 2010 | 11 | $1,322,000 | $120,200 | -- | -- | -- | -- |
| 2009 | 13 | $2,118,000 | $162,900 | -- | -- | -- | -- |
| 2008 | 26 | $3,740,835 | $143,900 | 7 | $936,391 | $133,800 | 0.93 |
| 2007 | 41 | $7,260,431 | $177,100 | 48 | $2,600,000 | $54,200 | 0.31 |
| 2006 | 38 | $6,047,984 | $159,200 | 2 | $165,000 | $82,500 | 0.52 |
| 2005 | 51 | $8,407,607 | $164,900 | 2 | $100,000 | $50,000 | 0.30 |
| 2004 | 44 | $6,191,533 | $140,700 | -- | -- | -- | -- |
| 2003 | 38 | $5,254,428 | $138,300 | -- | -- | -- | -- |
| 2002 | 42 | $5,689,993 | $135,500 | -- | -- | -- | -- |
| 2001 | 97 | $9,796,209 | $101,000 | -- | -- | -- | -- |
| 2000 | 90 | $8,328,300 | $92,500 | -- | -- | -- | -- |
| All Years | 558 | $75,389,801 | $135,100 | 70 | $4,536,151 | $64,800 | 0.48 |
| 2007-14 | 158 | $25,673,747 | $162,500 | 66 | $4,271,151 | $64,700 | 0.40 |
| 2000-06 | 400 | $49,716,054 | $124,300 | 4 | $265,000 | $66,300 | 0.53 |

Source: Underlying data collected by the U.S. Bureau of the Census.
Analysis and exhibit prepared by LandUse|USA, 2015.

# G

# Existing Households County and Places

Prepared by:

**LandUse**USA

Prepared for:

Northeast Michigan Prosperity Region 3

Michigan State Housing Development Authority

**MSHDA**
MICHIGAN STATE HOUSING
DEVELOPMENT AUTHORITY

Selected Target Markets - Forecast Households with BOOST
Alpena COUNTY, Michigan and Selected Communities - 2016

<span style="float:right">Exhibit G.1</span>

| EXISTING HOUSEHOLDS | Total 71 Lifestyle Clusters | Upscale Target Markets | Moderate Target Markets | Full Pockets Empty Nests \| E19 | Status Seeking Singles \| G24 | Wired for Success \| K37 | Bohem- ian Groove \| K40 | Full Steam Ahead \| O50 | Digital Depend- ents \| O51 | Urban Ambit- ion \| O52 | Striving Single Scene \| O54 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Target Market Level | All 71 | Upscale | Moderate | U | U | U | U | U | U | U | U |
| Year of Data | 2016 | 2016 | 2016 | 2016 | 2016 | 2016 | 2016 | 2016 | 2016 | 2016 | 2016 |
| Alpena COUNTY | 14,043 | 272 | 1,150 | 0 | 0 | 0 | 42 | 17 | 214 | 0 | 0 |
| Owners | 11,915 | 145 | 160 | 0 | 0 | 0 | 4 | 0 | 141 | 0 | 0 |
| Renters | 2,128 | 127 | 989 | 0 | 0 | 0 | 38 | 16 | 73 | 0 | 0 |
| City of Alpena | 5,068 | 106 | 608 | 0 | 0 | 0 | 30 | 0 | 76 | 0 | 0 |
| Owners | 3,925 | 52 | 69 | 0 | 0 | 0 | 3 | 0 | 50 | 0 | 0 |
| Renters | 1,143 | 53 | 538 | 0 | 0 | 0 | 27 | 0 | 26 | 0 | 0 |
| Ossineke CDP | 425 | 22 | 19 | 0 | 0 | 0 | 2 | 0 | 20 | 0 | 0 |
| Owners | 380 | 14 | 0 | 0 | 0 | 0 | 0 | 0 | 13 | 0 | 0 |
| Renters | 45 | 8 | 19 | 0 | 0 | 0 | 1 | 0 | 7 | 0 | 0 |

Source: Results of a Target Market Analysis prepared exclusively by LandUse|USA © 2016 with all rights reserved.
Note: Due only to rounding, these figures might not sum exact and might not perfectly match summary tables in the narrative report.
The boost varies between +3% and +8%, depending on the share of existing households within the lifestyle clusters.
Clusters with the smallest share of households are given a big boost, and those with a largest share are given a minor boost.

Selected Target Markets - Forecast Households with BOOST
Alpena COUNTY, Michigan and Selected Communities - 2016

Exhibit G.2

| EXISTING HOUSEHOLDS | Total 71 Lifestyle Clusters | Upscale Target Markets | Moderate Target Markets | Colleges Cafes \| O53 | Family Troopers \| O55 | Humble Begin- nings \| P61 | Senior Discount \| Q65 | Dare to Dream \| R66 | Hope for Tomor- row \| R67 | Tight Money \| S70 | Tough Times \| S71 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Target Market Level | All 71 | Upscale | Moderate | M | M | M | M | M | M | M | M |
| Year of Data | 2016 | 2016 | 2016 | 2016 | 2016 | 2016 | 2016 | 2016 | 2016 | 2016 | 2016 |
| Alpena COUNTY | 14,043 | 272 | 1,150 | 0 | 137 | 0 | 506 | 277 | 0 | 140 | 90 |
| Owners | 11,915 | 145 | 160 | 0 | 1 | 0 | 148 | 6 | 0 | 1 | 4 |
| Renters | 2,128 | 127 | 989 | 0 | 135 | 0 | 359 | 271 | 0 | 139 | 86 |
| City of Alpena | 5,068 | 106 | 608 | 0 | 56 | 0 | 203 | 277 | 0 | 0 | 72 |
| Owners | 3,925 | 52 | 69 | 0 | 1 | 0 | 59 | 6 | 0 | 0 | 3 |
| Renters | 1,143 | 53 | 538 | 0 | 55 | 0 | 144 | 271 | 0 | 0 | 69 |
| Ossineke CDP | 425 | 22 | 19 | 0 | 0 | 0 | 0 | 0 | 0 | 19 | 0 |
| Owners | 380 | 14 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Renters | 45 | 8 | 19 | 0 | 0 | 0 | 0 | 0 | 0 | 19 | 0 |

Source: Results of a Target Market Analysis prepared exclusively by LandUse|USA © 2016 with all rights reserved.
Note: Due only to rounding, these figures might not sum exact and might not perfectly match summary tables in the narrative report.
The boost varies between +3% and +8%, depending on the share of existing households within the lifestyle clusters.
Clusters with the smallest share of households are given a big boost, and those with a largest share are given a minor boost.

## Existing Households by Predominant Lifestyle Cluster
## Alpena COUNTY, Michigan - 2015 (Base Year)

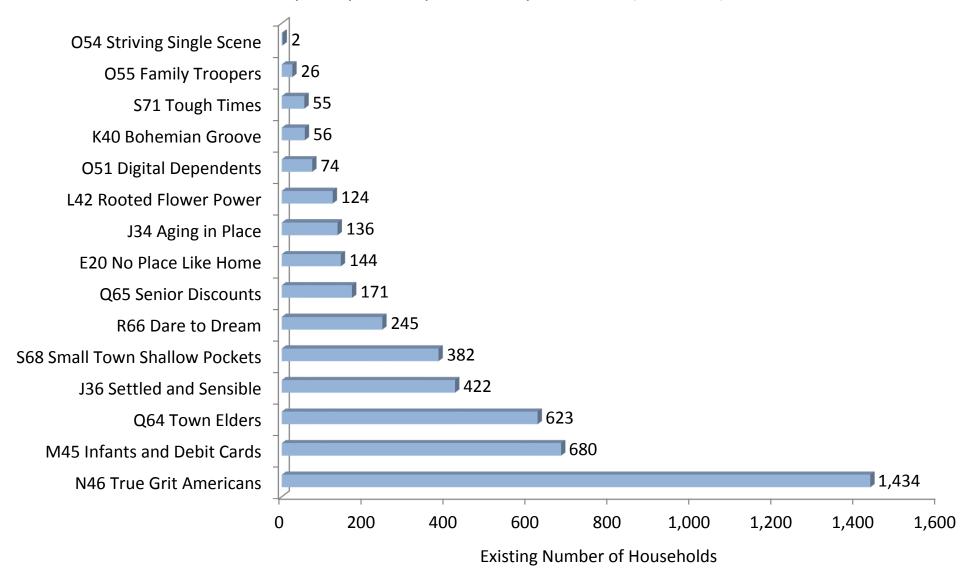| Lifestyle Cluster | Existing Number of Households |
|---|---|
| S71 Tough Times | 55 |
| O55 Family Troopers | 66 |
| K40 Bohemian Groove | 80 |
| S70 Tight Money | 86 |
| O51 Digital Dependents | 209 |
| R66 Dare to Dream | 245 |
| Q65 Senior Discounts | 427 |
| S68 Small Town Shallow Pockets | 430 |
| J36 Settled and Sensible | 493 |
| M44 Red White and Bluegrass | 621 |
| M45 Infants and Debit Cards | 740 |
| L43 Homemade Happiness | 795 |
| E21 Unspoiled Splendor | 1,059 |
| J35 Rural Escape | 1,559 |
| Q64 Town Elders | 2,001 |
| N46 True Grit Americans | 2,420 |

Existing Number of Households

Source: Underlying Mosaic|USA data provided by Experian Decision Analytics and powered by Sites|USA, with results through year-end 2015. Analysis and exhibit prepared by LandUse|USA; 2016.

# Existing Households by Predominant Lifestyle Cluster
## The City of Alpena - Alpena County, MI - 2015 (Base Year)

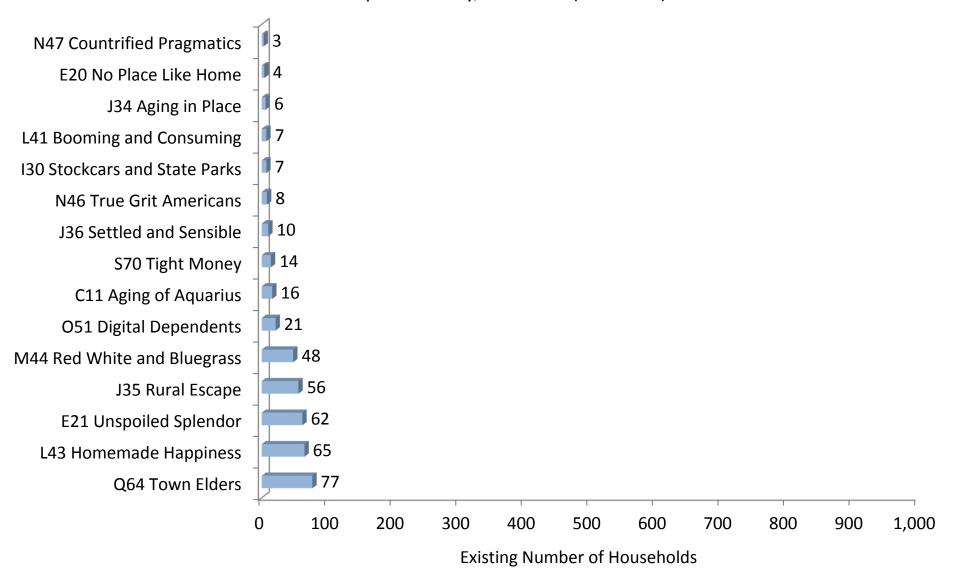| Cluster | Existing Number of Households |
|---|---|
| O54 Striving Single Scene | 2 |
| O55 Family Troopers | 26 |
| S71 Tough Times | 55 |
| K40 Bohemian Groove | 56 |
| O51 Digital Dependents | 74 |
| L42 Rooted Flower Power | 124 |
| J34 Aging in Place | 136 |
| E20 No Place Like Home | 144 |
| Q65 Senior Discounts | 171 |
| R66 Dare to Dream | 245 |
| S68 Small Town Shallow Pockets | 382 |
| J36 Settled and Sensible | 422 |
| Q64 Town Elders | 623 |
| M45 Infants and Debit Cards | 680 |
| N46 True Grit Americans | 1,434 |

Existing Number of Households

Source: Underlying Mosaic|USA data provided by Experian Decision Analytics and powered by Sites|USA, with results through year-end 2015. Analysis and exhibit prepared by LandUse|USA; 2016.

## Existing Households by Predominant Lifestyle Cluster
## Ossineke CDP - Alpena County, MI - 2015 (Base Year)

| Lifestyle Cluster | Existing Number of Households |
|---|---|
| N47 Countrified Pragmatics | 3 |
| E20 No Place Like Home | 4 |
| J34 Aging in Place | 6 |
| L41 Booming and Consuming | 7 |
| I30 Stockcars and State Parks | 7 |
| N46 True Grit Americans | 8 |
| J36 Settled and Sensible | 10 |
| S70 Tight Money | 14 |
| C11 Aging of Aquarius | 16 |
| O51 Digital Dependents | 21 |
| M44 Red White and Bluegrass | 48 |
| J35 Rural Escape | 56 |
| E21 Unspoiled Splendor | 62 |
| L43 Homemade Happiness | 65 |
| Q64 Town Elders | 77 |

Existing Number of Households

Source: Underlying Mosaic|USA data provided by Experian Decision Analytics and powered by Sites|USA, with results through year-end 2015. Analysis and exhibit prepared by LandUse|USA; 2016.

# H

# Market Assessment
# County and Places

Market Parameters and Forecasts - Households
Alpena County and Selected Communities - Michigan Prosperity Region 3

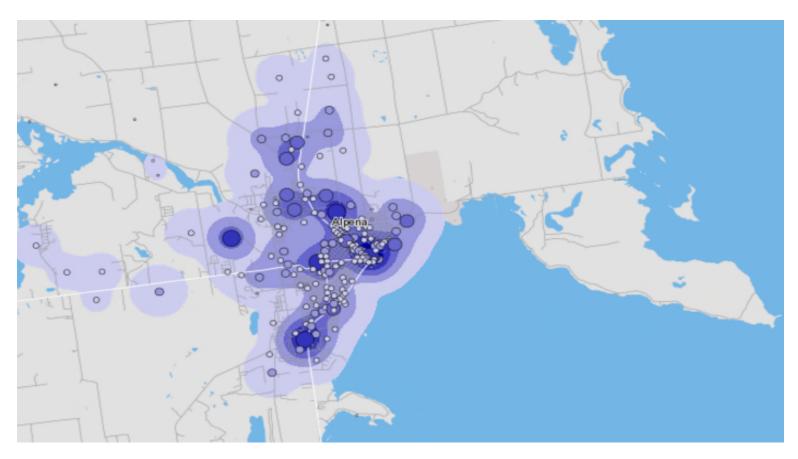| Order | County Name | 2010 Census Total Hhlds. | 2010 ACS 5-yr Total Hhlds. | 2011 ACS 5-yr Total Hhlds. | 2012 ACS 5-yr Total Hhlds. | 2013 ACS 5-yr Total Hhlds. | 2014 Estimate Total Hhlds. | 2016 Forecast Total Hhlds. | 2020 Forecast Total Hhlds. |
|---|---|---|---|---|---|---|---|---|---|
| | Alpena Co. | 12,791 | 13,357 | 13,234 | 13,098 | 12,899 | 12,899 | 12,899 | 12,899 |
| 1 | Alpena City | -- | 4,753 | 4,634 | 4,607 | 4,725 | 4,822 | 4,981 | 5,248 |
| 2 | Ossineke CDP | -- | 478 | 473 | 416 | 417 | 418 | 419 | 421 |

Source: Underlying data provided by the U.S. Decennial Census and the American Community Survey
for 2010 - 2014 (1- and 5-year estimates). Analysis, interpolations, and forecasts by LandUse|USA; 2016.

# Demographic Profiles - Population and Employment
## Alpena County, Michigan with Selected Communities - 2010 - 2015

| | Alpena COUNTY | The City of Alpena | The Village of Hillman | Ossineke CDP |
|---|---|---|---|---|
| Households Census (2010) | 12,791 | 4,734 | 300 | 395 |
| Households ACS (2013) | 12,899 | 4,725 | 293 | 417 |
| | | | | |
| Population Census (2010) | 29,598 | 10,483 | 701 | 938 |
| Population ACS (2013) | 29,399 | 10,421 | -- | 1,097 |
| | | | | |
| Group Quarters Population (2013) | 515 | 336 | 4 | 4 |
|   Correctional Facilities | 61 | 48 | 0 | 0 |
|   Nursing/Mental Health Facilities | 229 | 128 | 0 | 0 |
|   College/University Housing | 56 | 49 | 0 | 0 |
|   Military Quarters | 0 | 0 | 0 | 0 |
|   Other | 168 | 111 | 0 | 0 |
| | | | | |
| Daytime Employees Ages 16+ (2015) | 14,748 | 7,006 | -- | 174 |
| | | | | |
| Unemployment Rate (2015) | 3.5% | 3.6% | 3.6% | 2.2% |
| | | | | |
| Employment by Industry Sector (2013) | 100.0% | 100.0% | 100.0% | 100.0% |
| Agric., Forest, Fish, Hunt, Mine | 3.5% | 1.2% | 2.2% | 1.4% |
| Arts, Ent. Rec., Accom., Food Service | 8.9% | 11.3% | 5.2% | 8.1% |
| Construction | 6.6% | 4.9% | 11.3% | 5.3% |
| Educ. Service, Health Care, Soc. Asst. | 27.9% | 27.6% | 32.6% | 20.8% |
| Finance, Ins., Real Estate | 5.6% | 4.4% | 7.0% | 12.7% |
| Information | 1.8% | 1.5% | 0.0% | 6.9% |
| Manufacturing | 9.9% | 7.9% | 10.9% | 5.0% |
| Other Services, excl. Public Admin. | 4.3% | 3.9% | 3.0% | 5.0% |
| Profess., Sci., Mngmt., Admin., Waste | 6.7% | 8.6% | 9.1% | 19.9% |
| | | | | |
| Public Administration | 3.5% | 4.7% | 5.7% | 1.0% |
| Retail Trade | 14.7% | 17.0% | 8.7% | 7.7% |
| Transpo., Wrhse., Utilities | 4.1% | 4.0% | 3.5% | 2.2% |
| Wholesale Trade | 2.5% | 3.0% | 0.9% | 4.1% |

Spatial Distribution of Worker Population by Place of Work
Alpena County - The City of Alpena, Michigan - 2013



Source: U.S.Census Bureau, Center for Economic Studies; 2013.
Exhibit and analysis prepared by LandUse|USA; 2016.

Market Parameters and Forecasts - Total Housing Units, Including Vacancies
Alpena County and Selected Communities - Michigan Prosperity Region 3

| Order | County Name | 2010 ACS 1-yr Total Housing Units | 2011 ACS 1-yr Total Housing Units | 2012 ACS 1-yr Total Housing Units | 2013 ACS 1-yr Total Housing Units | 2014 Forecast Total Housing Units | 2016 Forecast Total Housing Units | 2020 Forecast Total Housing Units |
|---|---|---|---|---|---|---|---|---|
| | Alpena Co. | 15,985 | 16,016 | 16,020 | 15,988 | 16,016 | 16,016 | 16,016 |
| 1 | Alpena City | 5,007 | 4,982 | 4,975 | 5,197 | 5,206 | 5,206 | 5,206 |
| 2 | Ossineke CDP | 582 | 555 | 534 | 564 | 565 | 565 | 565 |

Source: Underlying data provided by the U.S. Decennial Census and the American Community Survey
for 2010 - 2014 (1- and 5-year estimates). Analysis, interpolations, and forecasts by LandUse|USA; 2016.

Market Parameters and Forecasts - Households in Renter-Occupied Units
Alpena County and Selected Communities - Michigan Prosperity Region 3

| Order | County Name | 2010 Census Renter Hhlds. | 2010 ACS 1-yr Renter Hhlds. | 2011 ACS 1-yr Renter Hhlds. | 2012 ACS 1-yr Renter Hhlds. | 2013 ACS 1-yr Renter Hhlds. | 2014 Estimate Renter Hhlds. | 2016 Forecast Renter Hhlds. | 2020 Forecast Renter Hhlds. |
|---|---|---|---|---|---|---|---|---|---|
| | Alpena Co. | 2,715 | 2,714 | 2,857 | 2,936 | 3,059 | 3,059 | 3,059 | 3,059 |
| 1 | Alpena City | -- | 1,392 | 1,411 | 1,495 | 1,719 | 1,816 | 1,975 | 2,242 |
| 2 | Ossineke CDP | -- | 89 | 93 | 95 | 90 | 87 | 84 | 81 |

Source: Underlying data provided by the U.S. Decennial Census and the American Community Survey
for 2010 - 2014 (1- and 5-year estimates). Analysis, interpolations, and forecasts by LandUse|USA; 2016.
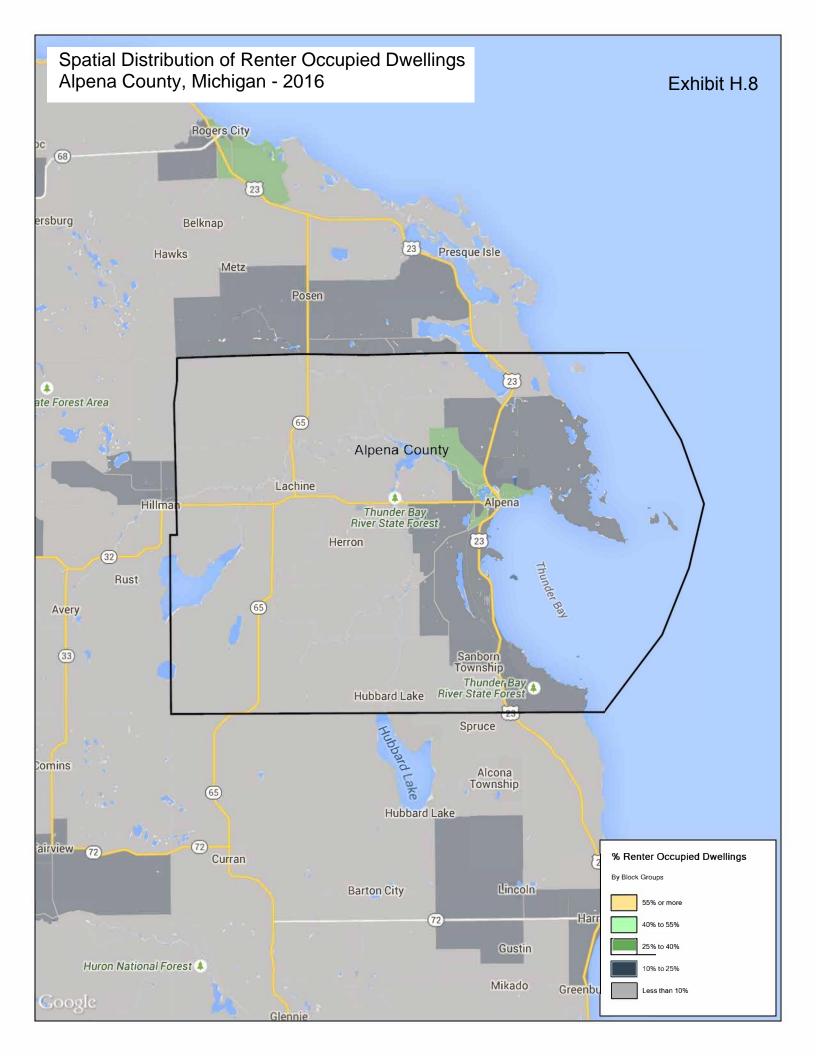Owner- and renter-occupied households have been adjusted by LandUse|USA.

Market Parameters and Forecasts - Households in Owner-Occupied Units
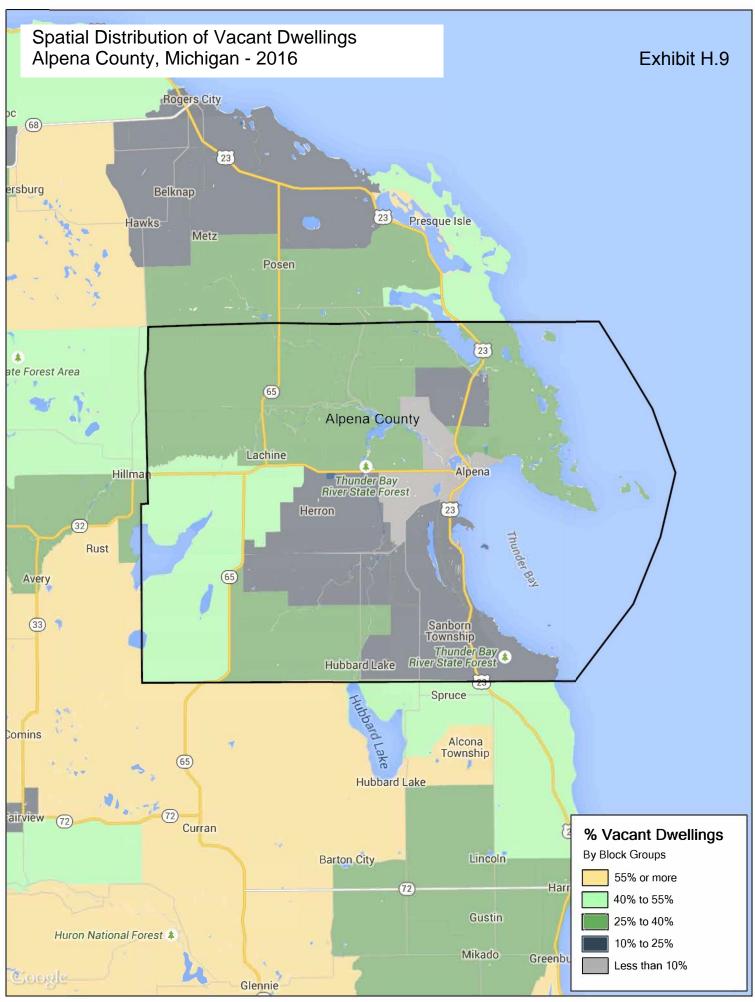Alpena County and Selected Communities - Michigan Prosperity Region 3

| Order | County Name | 2010 Census Owner Hhlds. | 2010 ACS 1-yr Owner Hhlds. | 2011 ACS 1-yr Owner Hhlds. | 2012 ACS 1-yr Owner Hhlds. | 2013 ACS 1-yr Owner Hhlds. | 2014 Estimate Owner Hhlds. | 2016 Forecast Owner Hhlds. | 2020 Forecast Owner Hhlds. |
|---|---|---|---|---|---|---|---|---|---|
| | Alpena Co. | 10,076 | 10,643 | 10,377 | 10,162 | 9,840 | 9,840 | 9,840 | 9,840 |
| 1 | Alpena City | -- | 3,361 | 3,223 | 3,112 | 3,006 | 3,006 | 3,006 | 3,006 |
| 2 | Ossineke CDP | -- | 389 | 380 | 321 | 327 | 331 | 335 | 340 |

Source: Underlying data provided by the U.S. Decennial Census and the American Community Survey
for 2010 - 2014 (1- and 5-year estimates). Analysis, interpolations, and forecasts by LandUse|USA; 2016.
Owner- and renter-occupied households have been adjusted by LandUse|USA.

Demographic Profiles - Total and Vacant Housing Units
Alpena County, Michigan with Selected Communities - 2013

Exhibit H.7

| | Alpena COUNTY | The City of Alpena | The Village of Hillman | Ossineke CDP |
|---|---|---|---|---|
| Total Housing Units (2013) | 15,988 | 5,197 | 319 | 564 |
| 1, mobile, other | 13,881 | 3,745 | 256 | 540 |
| 1 attached, 2 | 836 | 585 | 14 | 8 |
| 3 or 4 | 436 | 259 | 5 | 16 |
| 5 to 9 | 359 | 209 | 30 | 0 |
| 10 to 19 | 97 | 68 | 11 | 0 |
| 20 to 49 | 193 | 176 | 3 | 0 |
| 50 or more | 186 | 155 | 0 | 0 |
| Premium for Seasonal Households | 7% | 1% | 3% | 10% |
| Vacant (incl. Seasonal, Rented, Sold) | | | | |
| 1, mobile, other | 2,806 | 265 | 26 | 147 |
| 1 attached, 2 | 112 | 105 | 0 | 0 |
| 3 or 4 | 61 | 30 | 0 | 0 |
| 5 to 9 | 77 | 39 | 0 | 0 |
| 10 to 19 | 0 | 0 | 0 | 0 |
| 20 to 49 | 23 | 23 | 0 | 0 |
| 50 or more | 10 | 10 | 0 | 0 |
| Avail. (excl. Seasonal, Rented, Sold) | | | | |
| 1, mobile, other | 781 | 162 | 6 | 47 |
| 1 attached, 2 | 31 | 64 | 0 | 0 |
| 3 or 4 | 17 | 18 | 0 | 0 |
| 5 to 9 | 21 | 24 | 0 | 0 |
| 10 to 19 | 0 | 0 | 0 | 0 |
| 20 to 49 | 6 | 14 | 0 | 0 |
| 50 or more | 3 | 6 | 0 | 0 |
| Reason for Vacancy (2013) | 3,089 | 472 | 26 | 147 |
| For Rent | 183 | 112 | 0 | 0 |
| For Sale | 246 | 69 | 0 | 0 |
| Others | 431 | 107 | 6 | 47 |
| For Sale or Rent | 860 | 288 | 6 | 47 |
| Seasonal, Recreation | 2,171 | 126 | 20 | 100 |
| Migrant Workers | 0 | 0 | 0 | 0 |
| Rented, Not Occupied | 0 | 0 | 0 | 0 |
| Sold, Not Occupied | 58 | 58 | 0 | 0 |
| Not Yet Occupied | 58 | 58 | 0 | 0 |

Source: American Community Survey (ACS) 2008 - 2013.
Analysis and exhibit prepared by LandUse|USA; 2016.

Spatial Distribution of Renter Occupied Dwellings
Alpena County, Michigan - 2016

Exhibit H.8

**% Renter Occupied Dwellings**

By Block Groups

- 55% or more
- 40% to 55%
- 25% to 40%
- 10% to 25%
- Less than 10%

Spatial Distribution of Vacant Dwellings
Alpena County, Michigan - 2016

Exhibit H.9

**% Vacant Dwellings**
By Block Groups

- 55% or more
- 40% to 55%
- 25% to 40%
- 10% to 25%
- Less than 10%

Map and data by Sites|USA; exhibit prepared by LandUse|USA; 2015.

## PlaceScores™ - Local Placemaking Initiatives and Amenities
## (As evident through Online Search Engines)
## Alpena County, Michigan and Selected Communities - 2016

| | | |
|---|---|---|
| Primary County | | Alpena |
| Jurisdiction Name | | City of Alpena |
| 2010 Population (Decennial Census) | | 10,483 |
| 2013 Population (ACS 2009-13 Estimate) | | 10,421 |
| **City/Village-Wide Planning Documents** | | |
| 1 | City-Wide Master Plan (not county) | 1 |
| 2 | Has a Zoning Ordinance Online | 1 |
| 3 | Considering a Form Based Code | 1 |
| 4 | Parks & Rec. Plan and/or Commiss. | 1 |
| **Downtown Planning Documents** | | |
| 5 | Established DDA, BID, or Similar | 1 |
| 6 | DT Master Plan, Subarea Plan | 1 |
| 7 | Streetscape, Transp. Improv. Plan | 1 |
| 8 | Retail Market Study or Strategy | 1 |
| 9 | Residential Market Study, Strategy | 1 |
| 10 | Façade Improvement Program | 1 |
| **Downtown Organization and Marketing** | | |
| 11 | Designation: Michigan Cool City | 1 |
| 12 | Member of Michigan Main Street | 1 |
| 13 | Main Street 4-Point Approach | 1 |
| 14 | Facebook Page | 1 |
| **Listing or Map of Merchants and Amenities** | | |
| 15 | City/Village Main Website | 0 |
| 16 | DDA, BID, or Main Street Website | 1 |
| 17 | Chamber or CVB Website | 1 |
| Subtotal Place Score (17 points possible) | | 16 |

This PlaceScore assessment is based only on internet research, and has not been field verified.
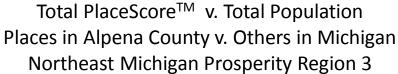Analysis and assessment by LandUse|USA; © 2016.
If a community's amenities and resources are not listed, then the challenge is to improve marking efforts, and ensure that the resources are available and easy to find through mainstream online search engines.
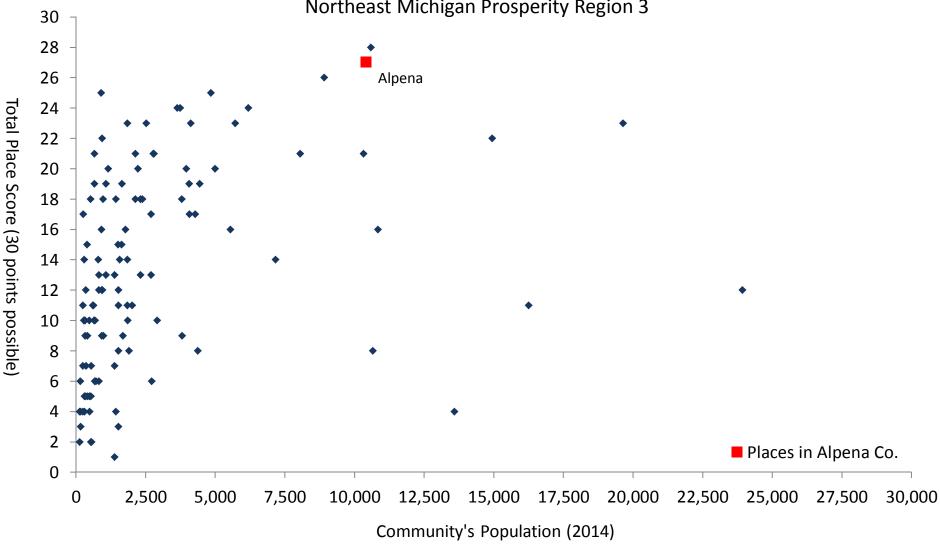The PlaceScore term and methodology is trademarked by LandUse|USA with all rights reserved.

PlaceScores™ - Local Placemaking Initiatives and Amenities
(As evident through Online Search Engines)
Alpena County, Michigan and Selected Communities - 2016

| | Primary County | Alpena |
|---|---|---|
| | Jurisdiction Name | City of Alpena |
| 2010 Population (Decennial Census) | | 10,483 |
| 2013 Population (ACS 2008-13 Estimate) | | 10,421 |

Unique Downtown Amenities

| | | |
|---|---|---|
| 1 | Cinema/Theater, Playhouse | 1 |
| 2 | Waterfront Access/Parks | 1 |
| 3 | Established Farmer's Market | 1 |
| 4 | Summer Music in the Park | 1 |
| 5 | National or Other Major Festival | 1 |

Downtown Street and Environment

| | | |
|---|---|---|
| 6 | Angle Parking (not parallel) | 0 |
| 7 | Reported Walk Score is 50+ | 1 |
| 8 | Walk Score/1,000 Pop is 40+ | 0 |
| 9 | Off Street Parking is Evident | 1 |
| 10 | 2-Level Scale of Historic Buildings | 1 |
| 11 | Balanced Scale 2 Sides of Street | 1 |
| 12 | Pedestrian Crosswalks, Signaled | 1 |
| 13 | Two-way Traffic Flow | 1 |

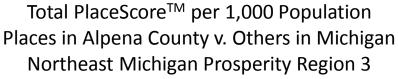| | |
|---|---|
| Subtotal Place Score (13 points possible) | 11 |
| Total Place Score (30 Points Possible) | 27 |
| Total Place Score per 1,000 Population | 3 |
| Reported Walk Score (avg. = 42) | 75 |
| Walk Score per 1,000 Population | 7 |

This PlaceScore assessment is based only on internet research, and has not been field verified.
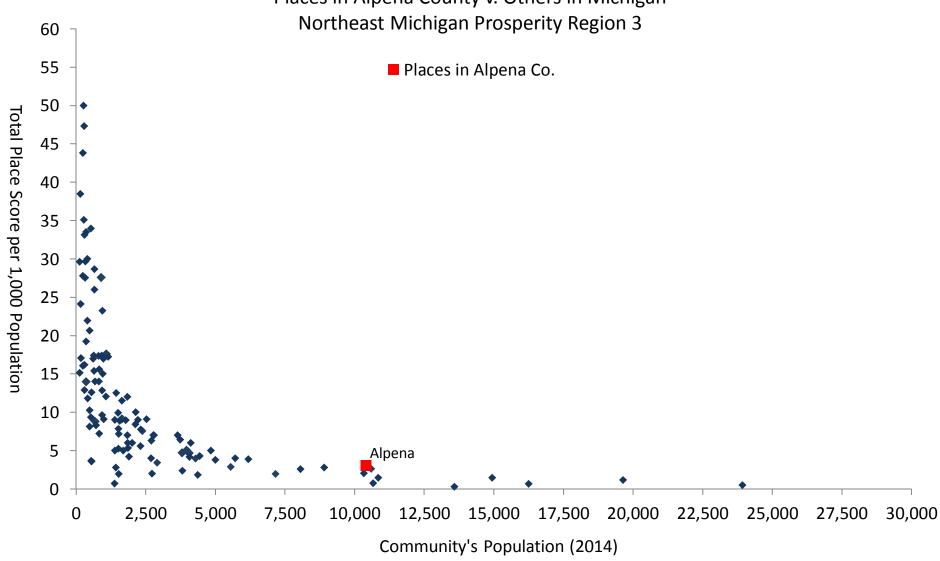Analysis and assessment by LandUse|USA; © 2016.
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# Total PlaceScore™ v. Total Population
## Places in Alpena County v. Others in Michigan
## Northeast Michigan Prosperity Region 3



**Y-axis:** Total Place Score (30 points possible)

**X-axis:** Community's Population (2014)

Alpena

■ Places in Alpena Co.

Source: Based on a subjective analysis of 30 Placemaking criteria using internet research only, and have not been field-verified.
Analysis by LandUse|USA, 2016. Population is ACS 5-year estimates for 2010-2014.
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## Total PlaceScore™ per 1,000 Population
## Places in Alpena County v. Others in Michigan
## Northeast Michigan Prosperity Region 3

■ Places in Alpena Co.



Alpena

Total Place Score per 1,000 Population

Community's Population (2014)

Source: Based on a subjective analysis of 30 Placemaking criteria using internet research only, and have not been field-verified.
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