

The City of Portage, Michigan

Lake Center District Preliminary Market Strategy

narrative report

Prepared by:
LandUse | USA





December 5, 2013

Mr. Brad Strader, AICP, PTP
Ms. Kathleen P. Duffy, AICP
LSL Planning, Inc.
306 S Washington, Ste. 400
Royal Oak, Michigan 48067
(248) 586-0505

RE: Preliminary Market Strategy – Lake Center District
The City of Portage, Michigan

Dear Brad and Kathleen,

Introduction, Purpose

At your request, LandUse|USA has completed this Preliminary Market Strategy for the Lake Center District in the City of Portage, and in support of your comprehensive community planning process for that community. This report is intended to provide you with a succinct narrative report of our recommendations, plus a guide to a draft presentation that we are prepared to deliver to the City on December 12, 2013. The following materials are included with this report, and will also be available to you and the City in an original electronic format.

<i>Attachments</i>	<i>Reference Numbers</i>	<i>Format</i>
Section A – Presentation (draft)	Slides 1 – 62	PowerPoint
Section B – Strategy with Inventory	Exhibits B.1 – B.10	Excel
Section C – Maps and Demographics	Exhibits C.1 – C.15	Adobe pdf

Strategy Recommendations

Regional Retail Competition – To begin, the retail recommendations reflect considerable retail competition in the City that pivots around the Crossroads Mall and big-box clusters along Westnedge Avenue and Shaver Road (Slide 2 and Exhibit C.4). Retailers and businesses in the Lake Center District should focus on differentiating from national chain stores with: 1) unique merchandise; 2) convenience; 3) high service levels; and 4) an enjoyable shopping environment enhanced by placemaking amenities.

Effective Trade Area – An effective trade area (ETA) has been delineated for this study that reflects the geographic area from which about 60% of all retail sales will be derived for retailers and businesses in the Lake Center District (Slide 3 and Exhibit C.5.) The balance or 40% of revenues will be derived by visitors to the district who live outside of the trade area.

Economic Observations – The strategy reflects the district’s economic benefits from proximity to the Kalamazoo/Battle Creek International Airport, and the campuses of major employers like Stryker Medical and Pfizer (Slide 4). During the recent Great Recession, layoffs at Pfizer impacted Kalamazoo’s facilities as well as other locations. However, unemployment rates Kalamazoo County have significantly improved since then (Exhibit C.2.)

Population Assessment – The Lake Center ETA has an estimated 2013 population of just over 18,000 residents, which is less than half the total population for the City of Portage. Both the ETA and City are experiencing moderate population growth (Slide 5 and Exhibits C.6 – C.9.)

Per Capita Income – The Lake Center ETA has an estimated 2013 per capita income of \$31,727, or slightly higher than the City’s average of \$30,755. This is favorable compared to averages for Kalamazoo County (\$27,010.) The attached Exhibit C.9 also documents our estimates of the resident expenditure potential on GAF retail categories, which includes General Merchandise, Apparel, and Furniture.

Lifestyle Clusters – All residents in the United States can be classified among 70 distinct lifestyle clusters. Among these, only 7 clusters are represented in the Lake Center ETA. The largest category is *No Place Like Home* with 29.6% of the ETA’s total population. This is followed by *Aging of Aquarius* (19.9%), and *Unspoiled Splendor* (19.1%).

These top 3 clusters collectively represent nearly 70% of the ETA's total population. In comparison, less than 25% of the population throughout the City of Portage falls within these same groups (Slide 6 and Exhibits C.10 – C.12.) Short descriptions of all 70 clusters are available in the attached Exhibits C.13 – C.15.

Recreational Resources – The strategy also gives positive consideration for the city's diverse recreational choices and ways that they match with the lifestyle clusters. Amenities include sports facilities; open space and trails; and public lake access (Slides 7 – 9). These resources all enhance quality-of-life for Portage's residents.

Restaurants – We also observed complementary attractions along the Portage and Sprinkle Road Corridors, including restaurants and eating establishments (Slides 18 and 19) and family fun centers (Slides 20 and 21.) The U.S. Economic Census continues to classify restaurants as a subcategory among Traveler Accommodations, but they are far more than that.

Dining out has grown into favorite pastime and primary source of entertainment for many households. Patronage at restaurants continues to increase as households attempt to balance busy schedules with the quest for venues that add value to every dollar spent. Locally-owned restaurants offering themes, entertainment, and unique settings – like waterfront views on a boardwalk – will be most able to compete against the redundancy of national chains.

Family Adventure Sports – The AirZoo is a significant regional attraction that helps attract visiting families seeking entertainment, recreation, and adventure. The regional draw of this facility is being leveraged by other establishments like Airway Lanes and Jungle Joes, and they collectively help generate a critical mass and variety of venues needed to generate repeat visitors.

Retail establishments like Hobby Sports, Racewear, Kalamazoo Choppers, and L & J Hobbies are leveraging and help reinforce the theme of attractions focused on adventure and sports (Slide 22.) In the marine category (Slide 23), Boat City Marine, Four Winns Powersports, and Docks Unlimited are important anchors that bridge the theme of adventure sports over to watersports.

Retail Inventory and Clusters – Exhibits B.2 through B.10 are important attachments and support the market strategy recommendations. The lists are intended to show clusters of businesses by category, and also identify market opportunities within some of those clusters (highlighted in green font.)

Hardline Categories – The market strategy focuses on big-ticket, hardline categories that would generate the highest revenues and productivity levels (sales per square foot) for the district. Hardline categories are also more likely to be profitable when bolstered by internet sales. Top recommended categories include hobby, sporting goods, home improvement, electronics, water-related recreational venues, fitness centers, and lawn & garden supplies.

Softline Categories – Secondary strategy recommendations are also provided for soft-line businesses that also tend to sell smaller-ticket items. Examples include personal care services, alteration services, craft supplies, and specialty food items. Apparel stores are not a recommended category, and these will tend to cluster around the department stores anchoring Crossroads Mall.

Incubated Small Businesses. We have identified a number of small businesses in Portage that are currently occupying space residential neighborhoods, as summarized on Slide 59. These businesses have already been incubated in the local market by proprietors that seem interested in operating a business, but have not chosen conventional commercial space. The strategy recommendations include contacting these businesses and helping them find better locations with exposure to commercial traffic, and helping them grow and prosper while filling commercial vacancies.

For example, we noted L & J Hobbies and Hobby-Sports.com both serve a niche category, and that their locations include front along Portage Road. Other types of niche shops could help reinforce this category, such as Early American Enterprises, Mad Hatter's Leather Shop, etc.

As another example, Something for All Seasons should have been a viable business and could still be a candidate for a new operator with some reformatting, perhaps focusing on boat motors, jet skis, motorcycles, and other small recreational vehicles.

In a related category of automotive supply and repair, Bills Sound Center (car stereos) is a business that appears to operating out of residential space and could benefit from retail space along Portage Road. These are just a few examples, and Exhibits B.2 through B.10 are intended to provide a more complete list.

As complementary exhibits, Slide 60 shows a few local small businesses that have websites or other internet presence, and Slide 61 shows an example in the Youz Guys Sausage Company that was preparing to open along Portage Road at the time of the inventory.

Community Identity – In conducting the market tour and field analysis, we searched for signs and images that effectively convey a unique identity and sense of place for the City of Portage and the Lake Center District, particularly along the Portage Avenue Corridor (Slide 10.) The main theme that emerged was the use of boats and canoes to identify the Lake Center District (Slide 11).

Overall, the Lake Center District brand is weak at best, and there is a need for significant improvement. The City and Lake Center District are aware of the challenge, and we understand that it will be more fully addressed in the Comprehensive Plan update.

Two Alternative Themes – Based on prior sessions with stakeholders, two themes have emerged as most likely for the Portage Road corridor and Lake Center District, including 1) a retro, vintage, and/or mid-century theme that leverages the architectural attributes of existing buildings (Slides 12 - 15); and 2) a theme that focuses on West and Austin Lakes (Slides 16 - 17.)

Retro Revival Theme – Retro revival has been gaining strides in popularity across the United States, and it is likely to be prevalent in architectural buildings throughout traditional downtown districts. Over time, retro revival themes in downtown districts will become increasingly more common. Along Portage Avenue, buildings with retro architectural features and/or signs are scattered in fragmented locations, and there isn't a clear clusters that could be leveraged to create a cohesive theme of retro revival.

Lakefront Access – Lakes and other water bodies are valuable resources that are absent from the vast majority of business districts across the United States. In the Lake Center District, West and Austin Lakes create a bottleneck in the road network at Clarence Drive (Exhibit C.4.) This node has also attracted two stores that serve as important anchors for the district, including Nelson Hardware (Do-It Center) and H & B Market grocery store.

Location Strategy – The West Lake shoreline along the west side of Portage Avenue includes two significant lakefront properties that appear to be available for sale. Reinforced by the hardware and grocery store anchors (slide 25), this represents the district's center of gravity, and is the focus of our top strategy recommendations (Slide 24.)

Along Portage Road, existing uses on the West Lake waterfront include the Mavcon facility, which could be reprogrammed as a restaurant with a visitor's center, gift shop, and/or public restrooms with changing rooms and showers (Slides 26 – 28.) Existing uses also include the vintage West Lake Drive In (Slide 29), which is a seasonable business.

The optimal market strategy calls for programming the West Lake waterfront into public space with direct water access. Depending on the project budget, stakeholder visioning, and related planning considerations, future uses could be passive (Slides 31 and 32) or have some higher level of intensity (Slides 33 through 38.) Adjacent uses suggest that it would be feasible to add public docks extending into the water (Slides 30 and 32.)

Secondary Opportunities – There are several additional opportunities to leverage lakeshore programming and expand the project area to include nearby properties. For example, the parking area between Nelson Hardware (Slide No. 39) and the H & B Grocery store could be programmed or even developed to create a more compact district.

Additional planning strategies could involve creating linkages with the Lakeview Park on Austin Lake; restoring the nearby garage (Slides 42 – 44); and integrating other adjacent properties into a larger renovation project (Slides 49 – 52.) These properties are delineated together on Slide 24 and Exhibit B.1, and warrant further discussion during stakeholder engagement and as part of the planning process.

Secondary Project – Several other nodes have also been identified as secondary projects, but should not take priority over programming the West Lake waterfront. Instead, they will become feasible and viable only after the West Lake waterfront is successfully reprogrammed. These secondary projects include:

Secondary Projects

- Renovating a second gas station (Slides 45 – 46), which could work in tandem with the first garage renovation (Slides 42 – 43.)
- Renovating the Great Skate and Chicago Style Pizza buildings to reinforce the retro revival theme (Slides 47 and 48.)
- Renovating the Nickles Bakery (Slides 55 and 56) and CNT's Racing and Production Screen Printing (Slides 57 and 58) to reinforce the cluster with West Michigan TV Repair (Slide 54.)

Closing

This concludes the preliminary and draft Market Strategy for the Lake Center District in Portage, Michigan. Recommendations regarding programming at the West Lake shoreline may be expanded and updated to reflect comments received during the meeting scheduled for December 12, 2013. Until then, we hope that this report will provide enough information and direction to help facilitate meaningful discussion during that meeting. Please let me know if you have any questions in the interim.

Sincerely,

A handwritten signature in blue ink that reads "Sharon M. Woods". The signature is written in a cursive style and is positioned above the typed name and title.

Sharon M. Woods, CRE
Principal
LandUse|USA, LLC



The City of Portage, Michigan

Lake Center District Preliminary Market Strategy

section a
presentation

Prepared by:
LandUse | USA

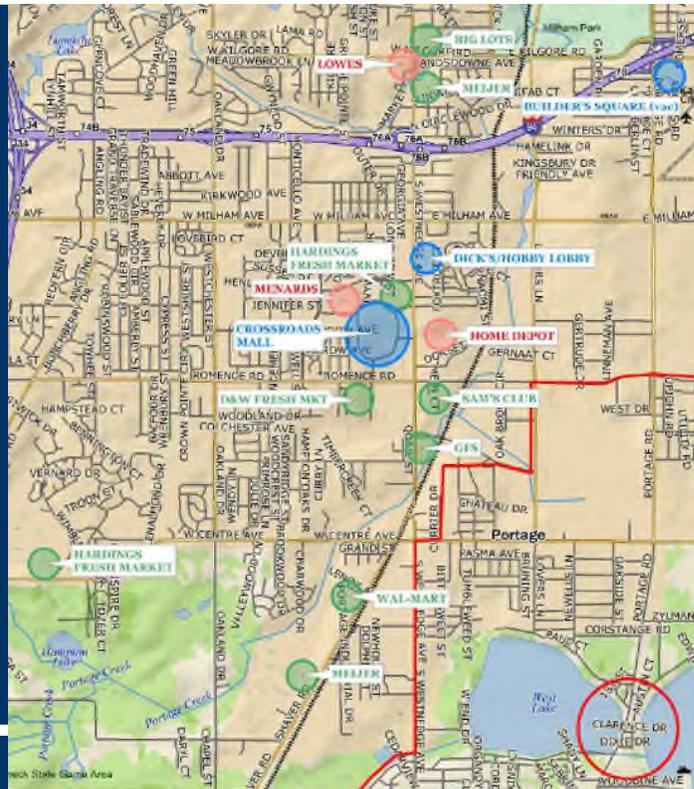
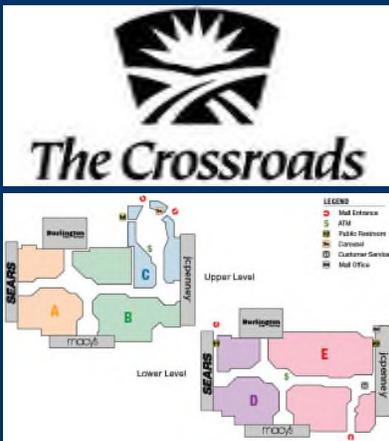


Lake Center District – Portage, Michigan Preliminary Market Strategy



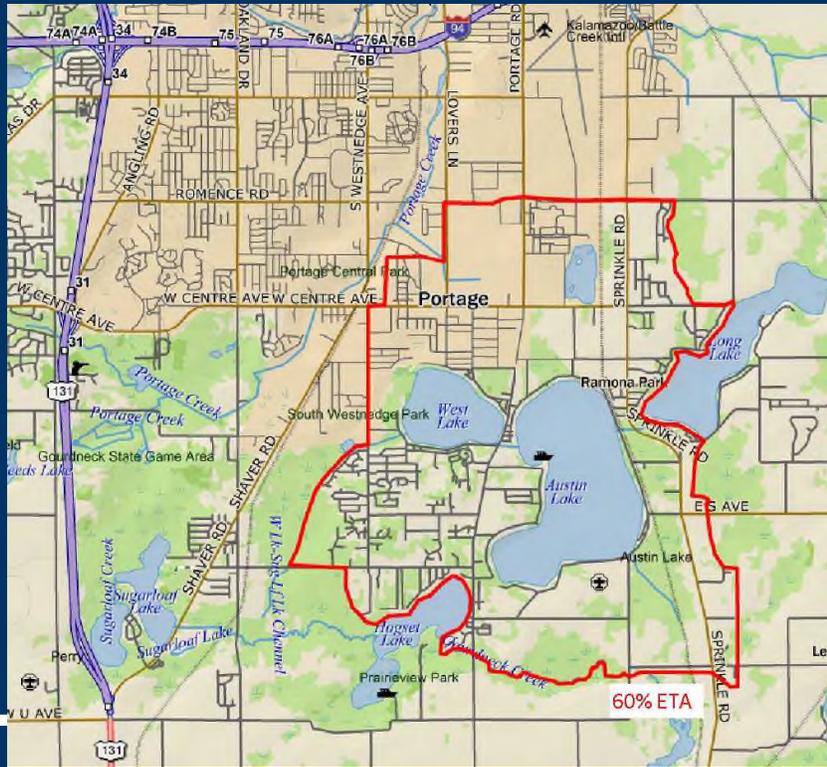
No. 1

City of Portage Regional Shopping Choices



No. 2

Lake Center District 60% Effective Trade Area (ETA)



No. 3

City of Portage, Michigan Major Employers



No. 4

Lake Center District Population and Income



Demographic Variables	Kalamazoo County	City of Portage	Lake Center ETA
Population (#)			
2000	238,603	44,982	16,055
2010	250,331	46,292	17,908
2013	254,237	47,050	18,227
2018	262,512	48,348	19,195
c.a.r. 2000 - 2010	0.5%	0.3%	1.1%
c.a.r. 2010 - 2013	0.5%	0.5%	0.6%
c.a.r. 2013 - 2018	0.6%	0.5%	1.0%
Per Capita Income			
2000	\$21,739	\$25,382	\$26,190
2010	\$25,198	\$28,914	\$29,833
2013	\$27,010	\$30,755	\$31,727
2018	\$31,040	\$35,016	\$35,849
c.a.r. 2000 - 2010	1.5%	1.3%	1.3%
c.a.r. 2010 - 2013	2.3%	2.1%	2.1%
c.a.r. 2013 - 2018	2.8%	2.6%	2.5%

No. 5

Lake Center District – Portage, Michigan Target Markets among Lifestyle Clusters



Demographic Variables	Kalamazoo County	City of Portage	Lake Center ETA
Lifestyle Clusters (Population %)			
E20 No Place Like Home	5.8%	14.4%	29.6%
C11 Aging of Aquarius	7.9%	9.8%	19.9%
E21 Unspoiled Splendor	8.0%	0.0%	19.1%
J34 Aging in Place	3.5%	13.6%	9.4%
J36 Settled and Sensible	4.9%	3.2%	8.3%
B08 Babies and Bliss	1.5%	2.8%	7.3%
I30 Stockcars and State Parks	7.7%	0.0%	6.5%

No. 6

City of Portage
Sports Facilities

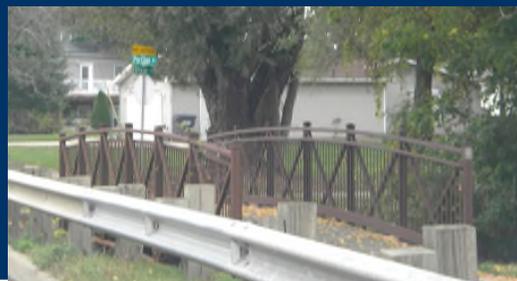


Kingdom Indoor Sports Ctr.

No. 7

City of Portage
Recreational Resources

Westlake Nature Preserve



No. 8

City of Portage
Water Access



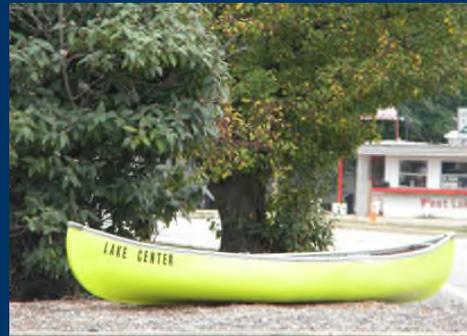
No. 9

City of Portage
"A Natural Place to Move"



No. 10

City of Portage
"LAKE CENTER DISTRICT"



No. 11

City of Portage
Mid-Century Images



No. 12

Westlake Drug Soda Fountain



No. 13



No. 14



WEST from the
LAKE

ANNIVERSARY ISSUE
Westlake
EST. IN 1992
Magazine
A PREMIER WEST COAST LUXURY PUBLICATION

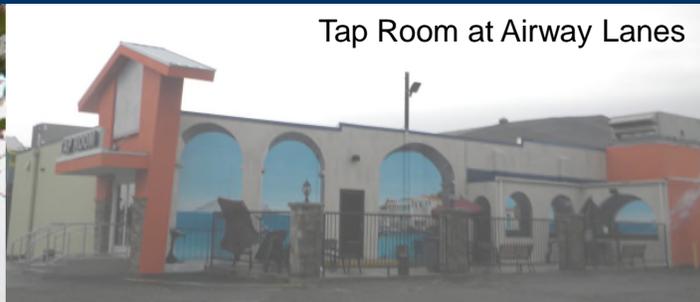
CLEAR
LAKE



lake bella



Tap Room at Airway Lanes



City of Portage
Latitude 42 Brewing Company



Others:
Buckey's Café & Catering
Erbelli's Gourmet Pizzeria
etc.



No. 19

City of Portage
Lazer Land (vacant)



No. 20

City of Portage
Regional Amenities



(on Sprinkle Road)



No. 21

City of Portage
Motorsports and Related Niches



No. 22

Tap Room at Airway Lanes



The Edge (Boat City Marine)



No. 23



No. 24

Lake Center District – Portage, Michigan
Economic Catalysts



No. 25

Lake Center District – Portage, Michigan
Economic Catalysts



No. 26

Lake Center District – Portage, Michigan
Economic Catalysts



No. 27

Lake Center District – Portage, Michigan
Economic Catalysts



No. 28

Lake Center District – Portage, Michigan
Economic Catalysts



No. 29

Lake Center District – Portage, Michigan
Existing Waterfront – North End



No. 30

**Economic Catalysts – Top Priorities
Programming the Waterfront**



No. 31

**Economic Catalysts – Top Priorities
Programing the Waterfront**



No. 32

Economic Catalysts – Top Priorities
Vintage Marine



No. 33

Economic Catalysts – Top Priorities
Programing the Waterfront



No. 34

Economic Catalysts – Top Priorities
Vintage Marine



No. 35

Economic Catalysts – Top Priorities
Programing the Waterfront



No. 36

**Economic Catalysts – Top Priorities
Programing the Waterfront**



**City of Portage
Anchors on East Side of Portage Rd.**



City of Portage
Anchors on East Side of Portage Rd.



No. 39

City of Portage
Reinforce Linkages Between the Lakes



No. 40



No. 41



No. 42

Economic Catalysts – Top Priorities
Vintage Gas Station, Classic Car Museum



No. 43

Economic Catalysts – Top Priorities
Vintage Marine - Outboards



No. 44

Economic Catalysts – Secondary Projects
Recently Razed



No. 45

Economic Catalysts – Secondary Projects
Vintage Gas Station, Classic Car Museum



No. 46

Economic Catalysts – Secondary Nodes
Great Skate and Chicago Style Pizza



No. 47

Economic Catalysts – Secondary Nodes
Chicago Style Pizza



No. 48

Economic Catalysts – Top Priorities
Vintage, Classic Gas Station



No. 49

Economic Catalysts – Top Priority
Baptist Church and adjacent properties



No. 50

Economic Catalysts – Top Priorities
East Side of Portage, South of Clarence



No. 51

Economic Catalysts – Top Priorities
East Side of Portage, South of Clarence



No. 52

Leveraging the Catalyst
Westlake Drug – Soda Fountain



No. 53

Economic Catalysts – Secondary Clusters
West Michigan TV Repair



No. 54

Economic Catalysts – Secondary Nodes
Nickles Bakery – 2 Brick Façade Storefronts



No. 55

Economic Catalysts – Secondary Nodes
Nickles Bakery – 2 Brick Façade Storefronts



No. 56

Economic Catalysts – Secondary Nodes
CNT's Racing, Production Screen Printing



No. 57

Economic Catalysts – Secondary Nodes
Non-Retail Services, Conveniences



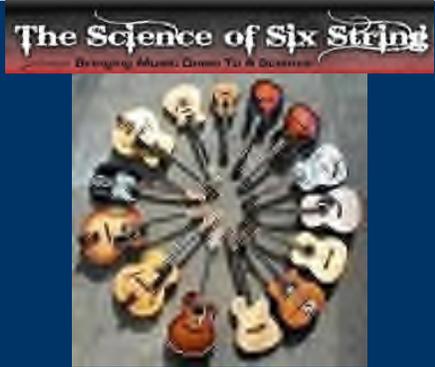
No. 58

Early America Enterprises	craft store
Garden Partners	garden center
Bills Sound Center	stereo equipment
Johnny Mac's	team apparel
David Cook Photography	photography
The Science of Six String	music lessons
Canary Gift and Pasty	specialty foods
Cordies Alterations	alterations
Mad Hatter's Leather Shop	alterations
Nickles Bakery – closed	specialty foods
Something for All Seasons – closed	small engine repair
Academy of Arts & Dance – closed	fitness

Box Stamps Etc., LLC
(products to promote literacy)

Home Feedback Order_Form

Welcome to our, on-line catalog. Boxstamps Etc. specializes in wonderful, innovative products designed to help promote literacy. These products are especially designed and hand-crafted for the early reading process.



Laurie's Hodgepodgery of Gifts



Decals, Banners, Signs



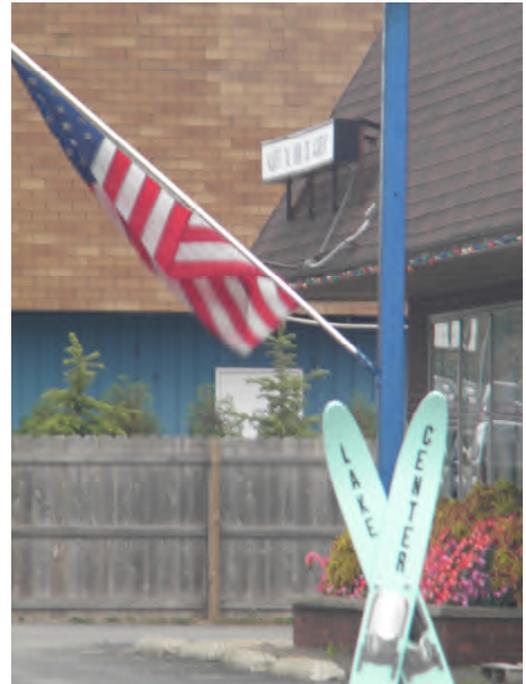


No. 61

THANK YOU!



No. 62



The City of Portage, Michigan

Lake Center District Preliminary Market Strategy

section b strategy with inventory

Prepared by:
LandUse | USA



Economic Catalyst and Lakefront Programming Lake Center District, Portage, Michigan

Exhibit B.1



<i>Business/Retailer Name</i>	<i>Category</i>	<i>Main Corridor</i>
Kalamazoo Choppers	Auto Dealer - Motorcycle	Portage Rd.
Deals Unlimited, Inc.	Auto Dealer - Used	Portage Rd.
<i>Train Barn & Hobby Shop; Museum</i>	<i>hobby - trains</i>	<i>Sprinkle Rd.</i>
L&J Hobbies	Hobby - trains	Portage Rd.
Hobby-Sports.com	Hobby - radio controlled	Portage Rd.
<i>Bicycles, scooters, club cars, skateboards</i>	<i>Sporting Goods - Variety</i>	<i>Lake Center District</i>
RWR Bait & Tackle	Sporting Goods - Bait	Portage Rd.
Double L Bait & Tackle	Sporting Goods - Bait	Vicksburg
<i>Something for All Seasons (reopen)</i>	<i>Small Engine Repairs</i>	<i>Portage Rd. - South</i>
<i>Bills Sound Center (retail space)</i>	<i>stereo equipment</i>	
R & N Buggy & Truck	Automotive Supply	Sprinkle Rd.
Auto Value	Automotive Supply	Portage Rd. - North
Napa Auto Parts	Automotive Supply	E. Centre Ave.
<i>Vintage Boat Showroom</i>	<i>Marine</i>	<i>Lake Center District</i>
<i>Outboard Motor Museum</i>	<i>Marine</i>	<i>Lake Center District</i>
The Edge / Boat City Marine, Inc.	Marine	Portage Rd.
Docks Unlimited	Marine	Portage Rd.
Lifts, Ladders, and Docks	Marine	Sprinkle Rd.
The Edge, Inc. Honda Marine	Marine	Portage Rd.

Lists are not intended to be all-inclusive, and may be only 80% to 90% complete and accurate. Omissions are unintentional. Strategy recommendations are shown in green font. "(retail space)" indicates existing businesses with addresses that appear to be residential neighborhoods. Inventories and strategy prepared by LandUse|USA; November 2013.

<i>Business/Retailer Name</i>	<i>Category</i>	<i>Main Corridor</i>
Liberty Square Furniture	Furniture	Portage Rd.
Seat n Sleep	Furniture	Sprinkle Rd.
Halls Closets & More	Home Furnishings	Portage Rd.
Consigned Design Antiques, Home Décor	Home Furnishings	Portage Rd.
Right Way Rental	Hardware	Portage Rd.
Nelson Hardware	Hardware	Portage Rd.
Kitchen Cabinet Showroom	Home Improvement	Portage Rd.
Powers Total Bath Remodeling	Home Improvement	Portage Rd.
Precision Windows	Home Improvement	Portage Rd.
Portage Flooring	Home Improvement	Portage Rd.
Aqua Plumbing Services	Home Improvement	Portage Rd.
BAM Heating & Cooling	Home Improvement	Cox Dr.
Sackett's Fireplace	Home Improvement	Sprinkle Rd.
Fox Brothers Co. Doors	Home Improvement	Sprinkle Rd.
Michigan Swim Pool	Home Improvement	Portage Rd. - North
Roodbergen Pools & Spa	Home Improvement	Portage Rd. - North
B & D Flooring	Home Improvement	Lakeview Dr.

Lists are not intended to be all-inclusive, and may be only 80% to 90% complete and accurate. Omissions are unintentional. Strategy recommendations are shown in green font. "(retail space)" indicates existing businesses with addresses that appear to be residential neighborhoods. Inventories and strategy prepared by LandUse|USA; November 2013.

<i>Business/Retailer Name</i>	<i>Category</i>	<i>Main Corridor</i>
Wireless Telecommunications	Electronics	Portage Rd.
Unique Phone-Screen Repair	Electronics	Portage Rd.
Lake Center Computers	Electronics	Portage Rd.
West Michigan TV Service	Electronics	Portage Rd.
H & B Market	Grocery	Portage Rd.
Lakeshore Fresh Market	Grocery	Sprinkle Rd.
Westlake Drug	Pharmacy	Portage Rd.
Green Earth Hydroponic	Pharmacy	Portage Rd.
Centre Street Market (closed)	Convenience	E. Centre Ave.
Country Food & Beverage	Convenience	Vicksburg
Sprinkle Beer Mart	Convenience	Sprinkle Rd.
On the Wings	Convenience	Portage Rd. - North
Lover's Lane Mart	Convenience	E. Centre Ave.
Sweet Convenience Food Store	Convenience, Liquor	E. Centre Ave.
Gourdneck Lake Market	Convenience, Liquor	Portage Rd. - South
Daane's Beer, Wine, Spirits	Convenience, Liquor	Portage Rd.

Lists are not intended to be all-inclusive, and may be only 80% to 90% complete and accurate. Omissions are unintentional. Strategy recommendations are shown in green font. "(retail space)" indicates existing businesses with addresses that appear to be residential neighborhoods. Inventories and strategy prepared by LandUse|USA; November 2013.

<i>Business/Retailer Name</i>	<i>Category</i>	<i>Main Corridor</i>
Johnny Mac's (retail space)	Apparel - sports	Equestrian Dr.
Back of the Net Sports	Apparel - sports	Sprinkle Rd.
CNT's Racewear	Apparel - sports	Portage Rd.
Salvation Army Thrift Store	Apparel - Resale	Portage Rd. - North
Nail Salon	Personal Care - nails	Portage Rd.
Vallar Nail Salon	Personal Care - nails	Centre Ave.
A-Kay's Creative Hair Designs	Personal Care - hair	Portage Rd.
Shear Reflection Salon	Personal Care - hair	Portage Rd.
Abstract Salon & Spa	Personal Care - hair	Portage Rd.
Professional Hair Design	Personal Care - hair	Portage Rd.
First Image Ink	Personal Care - ink	Sprinkle Rd.
Coronet Hair, Body, Tanning	Personal Care - tanning	Portage Rd.
<i>Note: personal care excludes massage therapy and chirporactic services.</i>		
Pet Boarding and Retreat	Pets - care	Portage Rd.
Lakeview Animal Hospital	Pets - care	Portage Rd.
Wiggles, Waggles & Tails	Pets - care	Portage Rd.
Portage Animal Hospital	Pets - care	Portage Rd.
Dogs by Design	Pets - grooming	Portage Rd.
Angie's Groom Room	Pets - grooming	Portage Rd.

Lists are not intended to be all-inclusive, and may be only 80% to 90% complete and accurate. Omissions are unintentional. Strategy recommendations are shown in green font. "(retail space)" indicates existing businesses with addresses that appear to be residential neighborhoods. Inventories and strategy prepared by LandUse|USA; November 2013.

<i>Business/Retailer Name</i>	<i>Category</i>	<i>Main Corridor</i>
Cordies Alterations (retail space) Portage Cleaners & Laundry	alterations, laundromat Laundry & Alterations	Oakside St. Portage Rd.
Early America Enterprises (retail space) Mad Hatter's Leather Shop (retail space) Wools, Yarns, Organic Craft Supplies Quilting, scrapbooking, craft room The Beading Bar Field's Fabrics	Crafts alterations, livery Crafts, internet business Supplies, classes Crafts Crafts	Mandigo Ave. Portage Rd. Portage Rd. Portage Rd. Portage Rd. Portage Rd. - North
The Science of Six String (retail space) David Cook Photography (retail space) Captured in Time Photography (retail space) Main Street Portraits Avalon Bookshop	music lessons, store photography photography photography Books	Centre Ave. Westnedge Ave. - Sou Osterhout Ave. Centre Ave. Portage Rd.
Canoe/Kayak, Jet Ski, Pontoon Rental Lazer Center (reopen) Airway Fun Center Air Zoo Great Skate Roller Rink Jungle Joe's Family Fun Ctr.	Entertainment Entertainment Entertainment Entertainment Entertainment Entertainment - bounce	Lake Center District Lake Center District Portage Rd. - North Portage Rd. - North Portage Rd. - South Sprinkle Rd.

Lists are not intended to be all-inclusive, and may be only 80% to 90% complete and accurate. Omissions are unintentional. Strategy recommendations are shown in green font. "(retail space)" indicates existing businesses with addresses that appear to be residential neighborhoods. Inventories and strategy prepared by LandUse|USA; November 2013.

Lake Center District ETA - Retail Inventory - 2013
 Prepared for the City of Portage, Michigan

Exhibit B.7

<i>Business/Retailer Name</i>	<i>Category</i>	<i>Main Corridor</i>
DJ ILLMixx	DJ Music Services	Centre Ave.
Powermix Productions Mobile	DJ Music Services	Sprinkle Ave. - South
Kalamazoo Music	DJ Music Services	Osterhout Ave.
Bart's Banners & Signs	Marketing	Portage Rd.
Printing Services	Marketing	Sprinkle Rd.
Total Media Group	Marketing	Cox Dr.
Howard Printing	Marketing	Sprinkle Rd.
A 1 Signs	Marketing	Portage Rd. - North
Production Screen Printing	Marketing	Portage Rd.
<i>Fitness Center with Weights</i>	<i>Fitness - weights</i>	<i>Portage Rd.</i>
<i>Academy of Arts & Dance (reopen)</i>	<i>Fitness - dance, yoga</i>	<i>Portage Rd.</i>
Repetitions Gym	Fitness - weights	Centre Ave.
Walker's Tae Kwon Do Academy	Fitness - martial arts	Portage Rd.
Southside DoJo Martial Arts Club	Fitness - martial arts	Portage Rd.
Polderman's Florist	Florist	Portage Rd.
Key Blooms, Inc.	Florist	Vicksburg
Days Inn & Suites	Hotel	Portage Rd. - North
Country Inn & Suites Carslon	Hotel	Portage Rd. - North

Lists are not intended to be all-inclusive, and may be only 80% to 90% complete and accurate. Omissions are unintentional. Strategy recommendations are shown in green font. "(retail space)" indicates existing businesses with addresses that appear to be residential neighborhoods. Inventories and strategy prepared by LandUse|USA; November 2013.

<i>Business/Retailer Name</i>	<i>Category</i>	<i>Main Corridor</i>
Lawn & Garden Equipment Dealer Garden Partners (retail space)	Lawn & Garden Garden Center	Portage Ave. Centre Ave. - East
Nash Products, Pest Control	Lawn & Garden	Vicksburg
Orkin Pest & Termite Control	Lawn & Garden	Sprinkle Rd.
Archer Pest Control	Lawn & Garden	Portage Rd. - North
Earth-Works Lawn & Landscape	Lawn & Garden	Portage Rd.
Tacos and Authentic Hispanic Chicago Style Pizza (seasonal)	Restaurant - Hispanic Restaurant - Italian	Portage Rd. Portage Rd. - South
Callahans Family Restaurant	Restaurant - American	Portage Rd. - North
Bucky's Café & Catering	Restaurant - American	Portage Rd.
Daily Grind Café	Restaurant - American	Portage Rd.
Kap's Kitchen	Restaurant - American	Portage Rd.
RJ Sports Bar & Grill	Restaurant - American	Portage Rd.
Theo & Stacy's	Restaurant - American	Portage Rd. - North
Joy Fong Restaurant	Restaurant - Asian	Portage Rd.
Erbelli's Gourmet Pizzeria	Restaurant - Italian	Portage Rd.
Beacon Club Members Club	Restaurant - Upscale	Portage Rd. - North

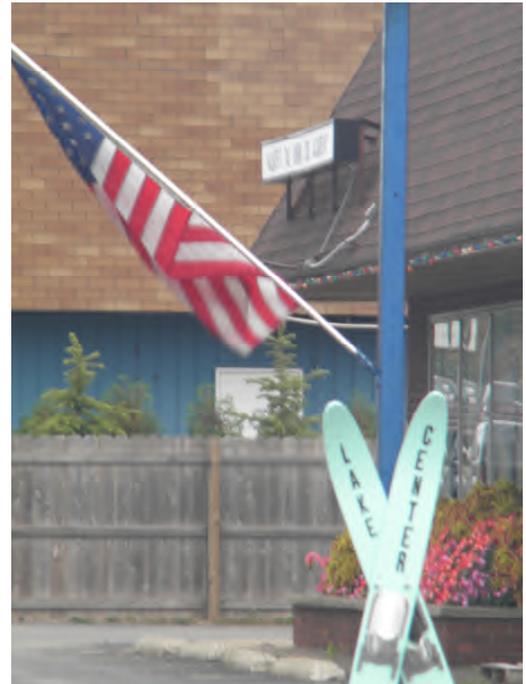
Lists are not intended to be all-inclusive, and may be only 80% to 90% complete and accurate. Omissions are unintentional. Strategy recommendations are shown in green font. "(retail space)" indicates existing businesses with addresses that appear to be residential neighborhoods. Inventories and strategy prepared by LandUse|USA; November 2013.

<i>Business/Retailer Name</i>	<i>Category</i>	<i>Main Corridor</i>
Callahans Family Restaurant	Restaurant - American	other competition
BD's Mongolian Barbeque	Restaurant - Asian	other competition
Bravo Restaurant & Café	Restaurant - Italian	other competition
Angelo's Italian Eatery	Restaurant - Italian	other competition
Carrabba's Italian Grill	Restaurant - Italian	other competition
Noodles & Co.	Restaurant - Italian	other competition
Olga's Kitchen	Restaurant - Italian	other competition
Olive Garden	Restaurant - Italian	other competition
Long John Silver's	Restaurant - Seafood	other competition
Red Lobster	Restaurant - Seafood	other competition
Chili's Grill & Bar	Restaurant - Southern	other competition
Brann's Steakhouse & Grille	Restaurant - Steaks	other competition
Logan's Roadhouse	Restaurant - Steaks	other competition
Taco Bob's	Restaurant - Fast Food	Sprinkle Rd.
Subway Restaurants	Restaurant - Fast Food	E. Centre Ave.
Arby's	Restaurant - Fast Food	other competition
Burger King	Restaurant - Fast Food	other competition
Kentucky Fried Chicken	Restaurant - Fast Food	other competition
McDonald's (4)	Restaurant - Fast Food	other competition
Taco Bell (2)	Restaurant - Fast Food	other competition
Wendy's	Restaurant - Fast Food	other competition
Westlake Drive-in (closed)	Restaurant - Fast Food	other competition

Lists are not intended to be all-inclusive, and may be only 80% to 90% complete and accurate. Omissions are unintentional. Strategy recommendations are shown in green font. "(retail space)" indicates existing businesses with addresses that appear to be residential neighborhoods. Inventories and strategy prepared by LandUse|USA; November 2013.

<i>Business/Retailer Name</i>	<i>Category</i>	<i>Main Corridor</i>
Nickles Cupcakes, special occasion cakes	Specialty - Bakery	Lake Center District
Vintage Gas Station - candy store	Specialty - Sweets	Lake Center District
Youz Guys Sausage Co.	Specialty - Meats	Portage Rd.
Canary Gift Shop & Pasties (retail space)	Specialty - Pasties	Portage Rd.
El Dorado Café (closed)	Specialty - Café	Portage Rd.
Country Maid Bakery (closed)	Specialty - Bakery	Portage Rd.
Catering by Daane's	Specialty - Catering	other
Pure Tobacco Supplies	Specialty - Tobacco	Portage Rd.
Brew Time Beverage (closed)	Specialty - Beverage	Portage Rd. - South
Westlake Drug Soda Fountain	Specialty - Ice Cream	Portage Rd.
Y'Opa Frozen Yogurt	Specialty - Ice Cream	E. Centre Ave.
Dairy Queen	Specialty - Ice Cream	E. Centre Ave.
Cruise Connections	Travel Agent	Portage Rd.

Lists are not intended to be all-inclusive, and may be only 80% to 90% complete and accurate. Omissions are unintentional. Strategy recommendations are shown in green font. "(retail space)" indicates existing businesses with addresses that appear to be residential neighborhoods. Inventories and strategy prepared by LandUse|USA; November 2013.



The City of Portage, Michigan

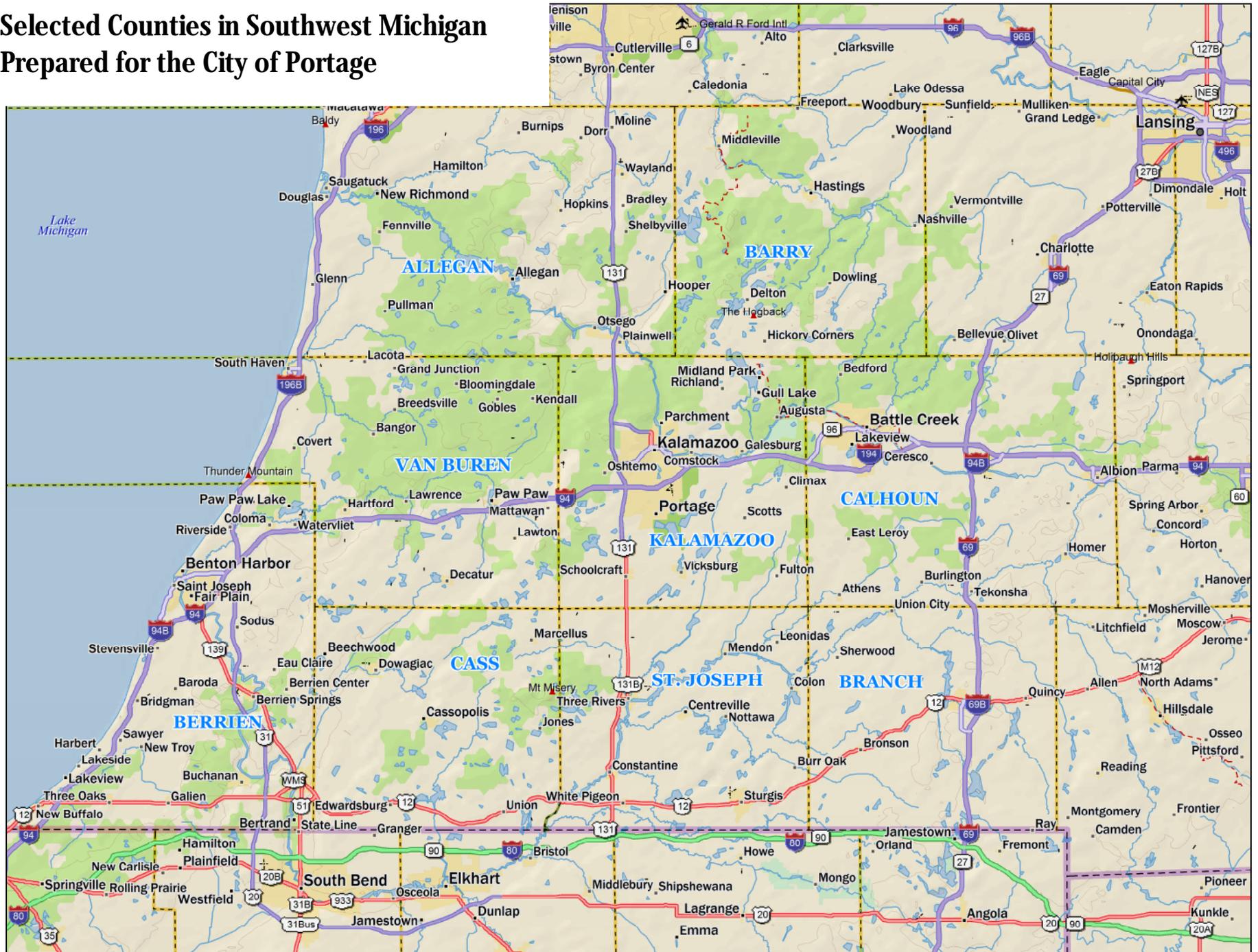
Lake Center District Preliminary Market Strategy

section c maps and demographics

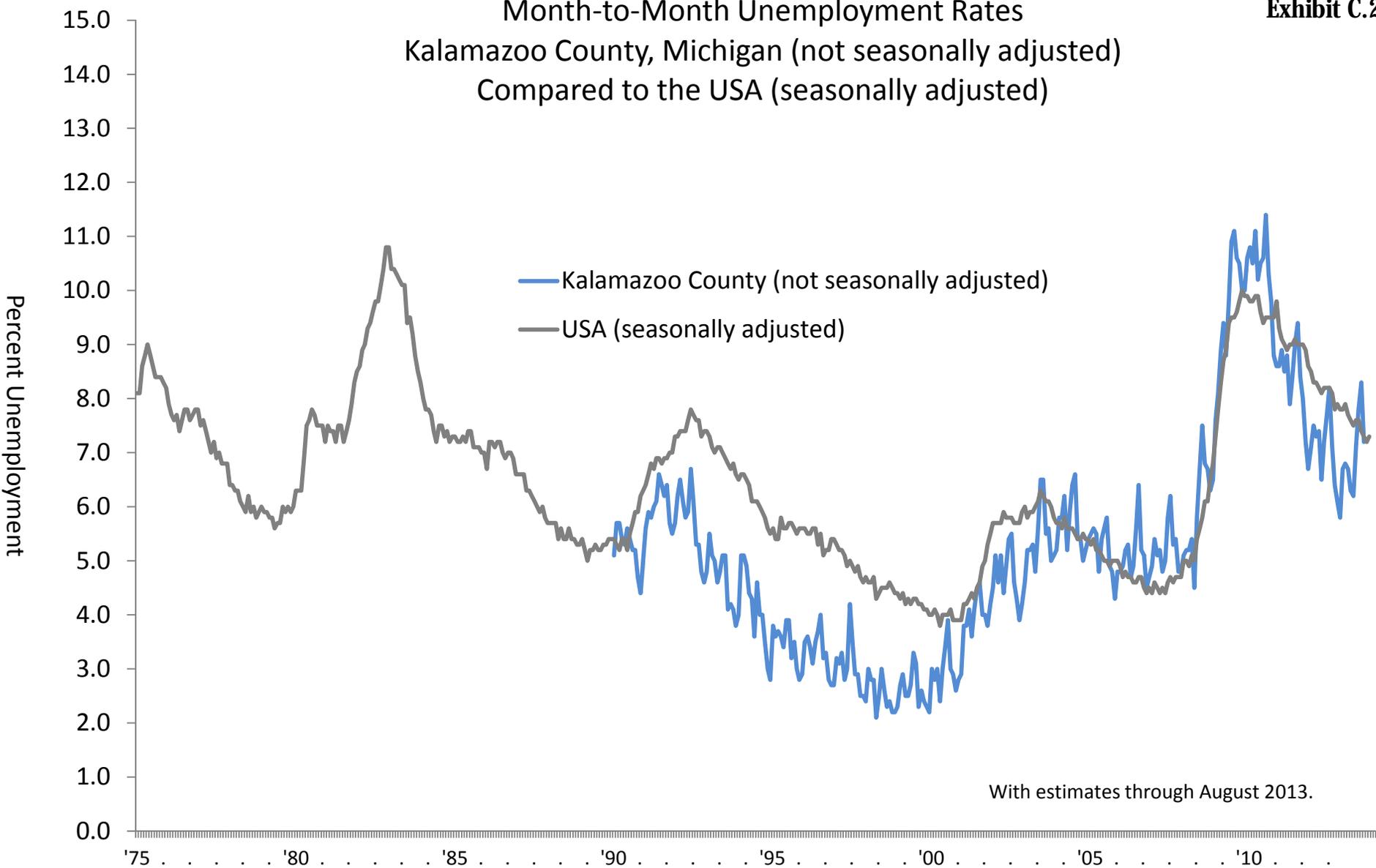
Prepared by:
LandUse | USA



Selected Counties in Southwest Michigan Prepared for the City of Portage



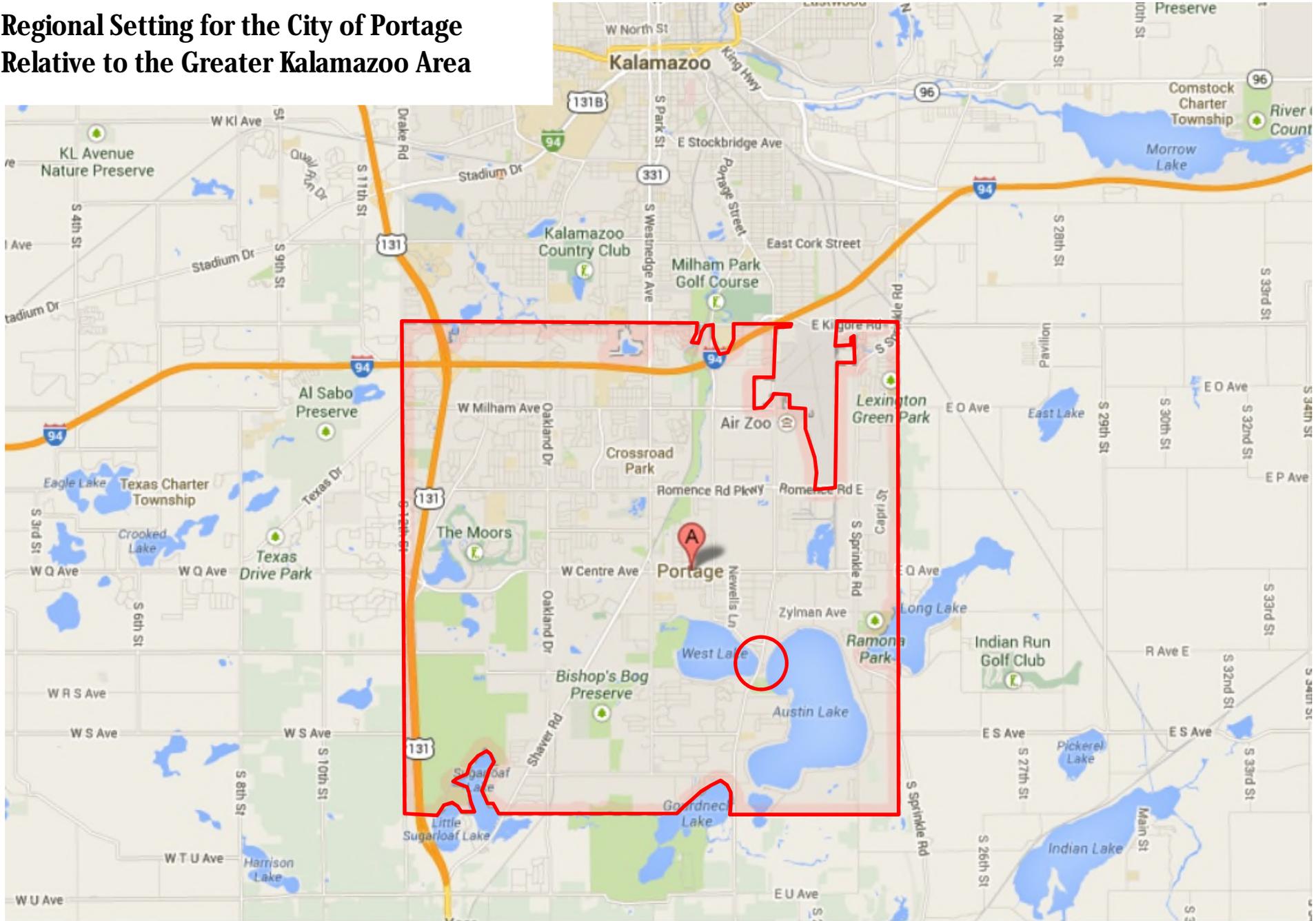
Month-to-Month Unemployment Rates Kalamazoo County, Michigan (not seasonally adjusted) Compared to the USA (seasonally adjusted)



With estimates through August 2013.

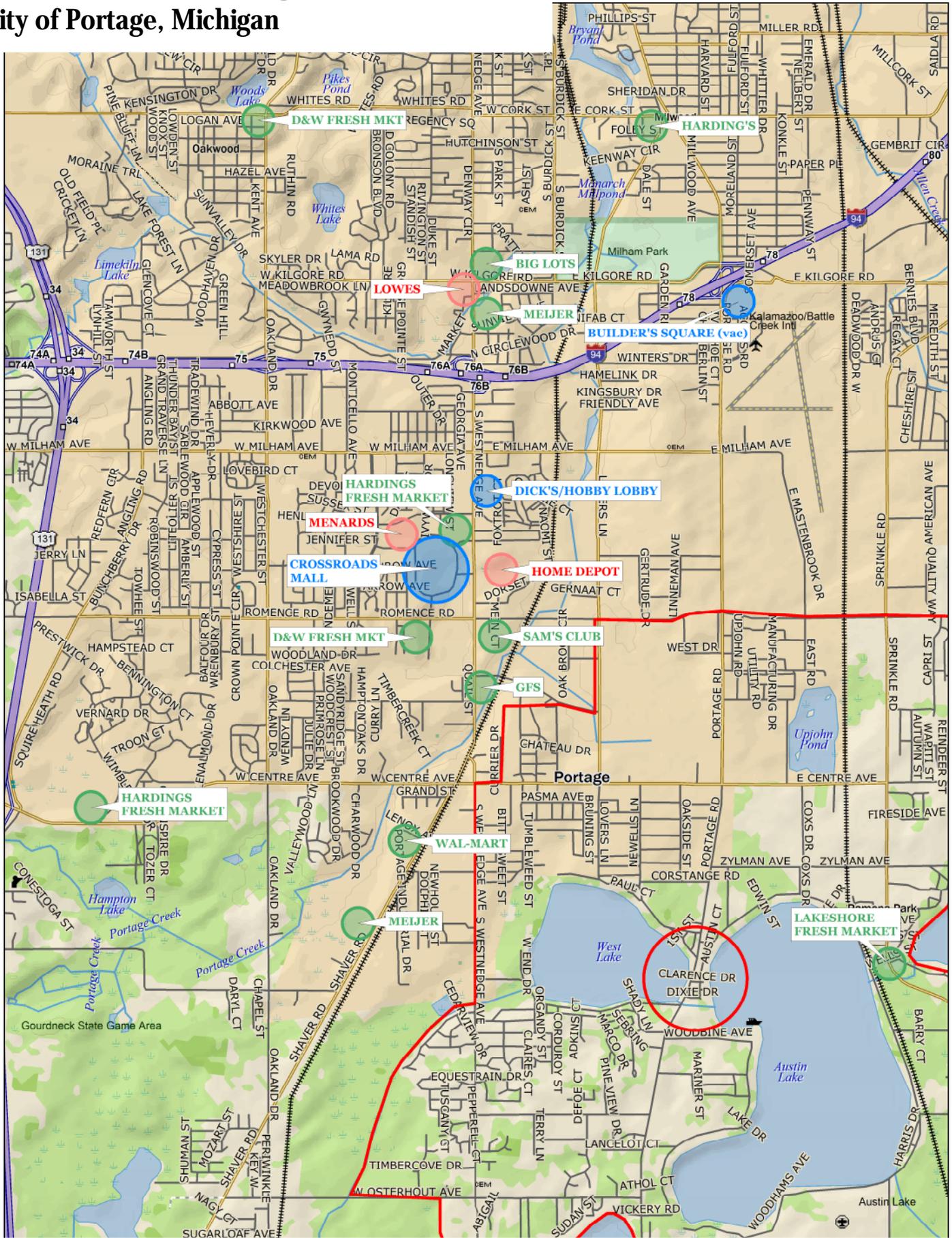
(e) All numbers are seasonally adjusted; figures for November are preliminary estimates. All figures are percents of the total Labor Force Age 16+. Source: Bureau of Labor Statistics; Analysis by LandUse|USA, November 2013.

Regional Setting for the City of Portage Relative to the Greater Kalamazoo Area



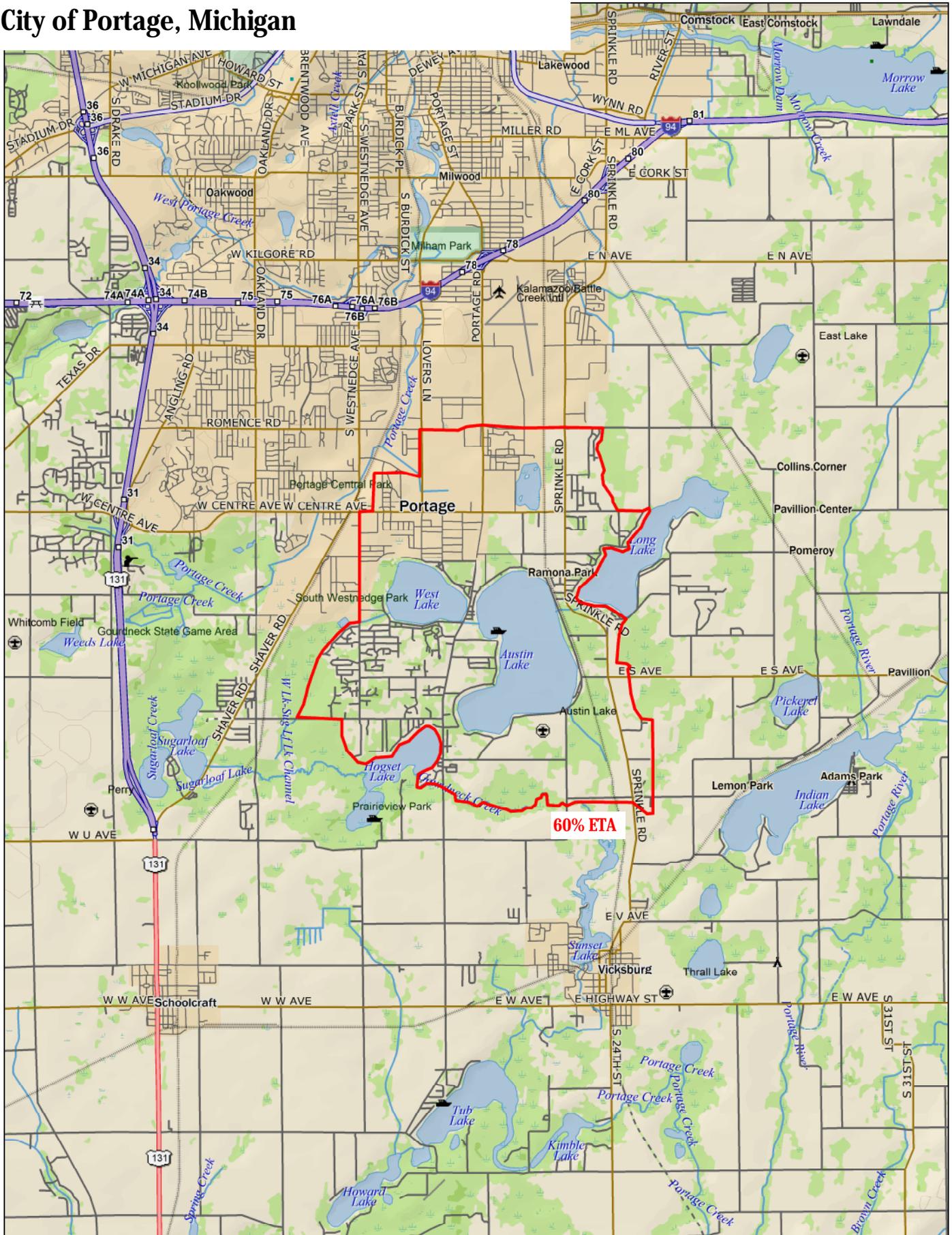
Selected National and Regional Chain Stores City of Portage, Michigan

Exhibit C.4



Lake Center District - Effective Trade Area (60%) City of Portage, Michigan

Exhibit C.5



Lake Center Effective Trade Area (ETA)
 Compared to the City of Portage and Kalamazoo County, Michigan

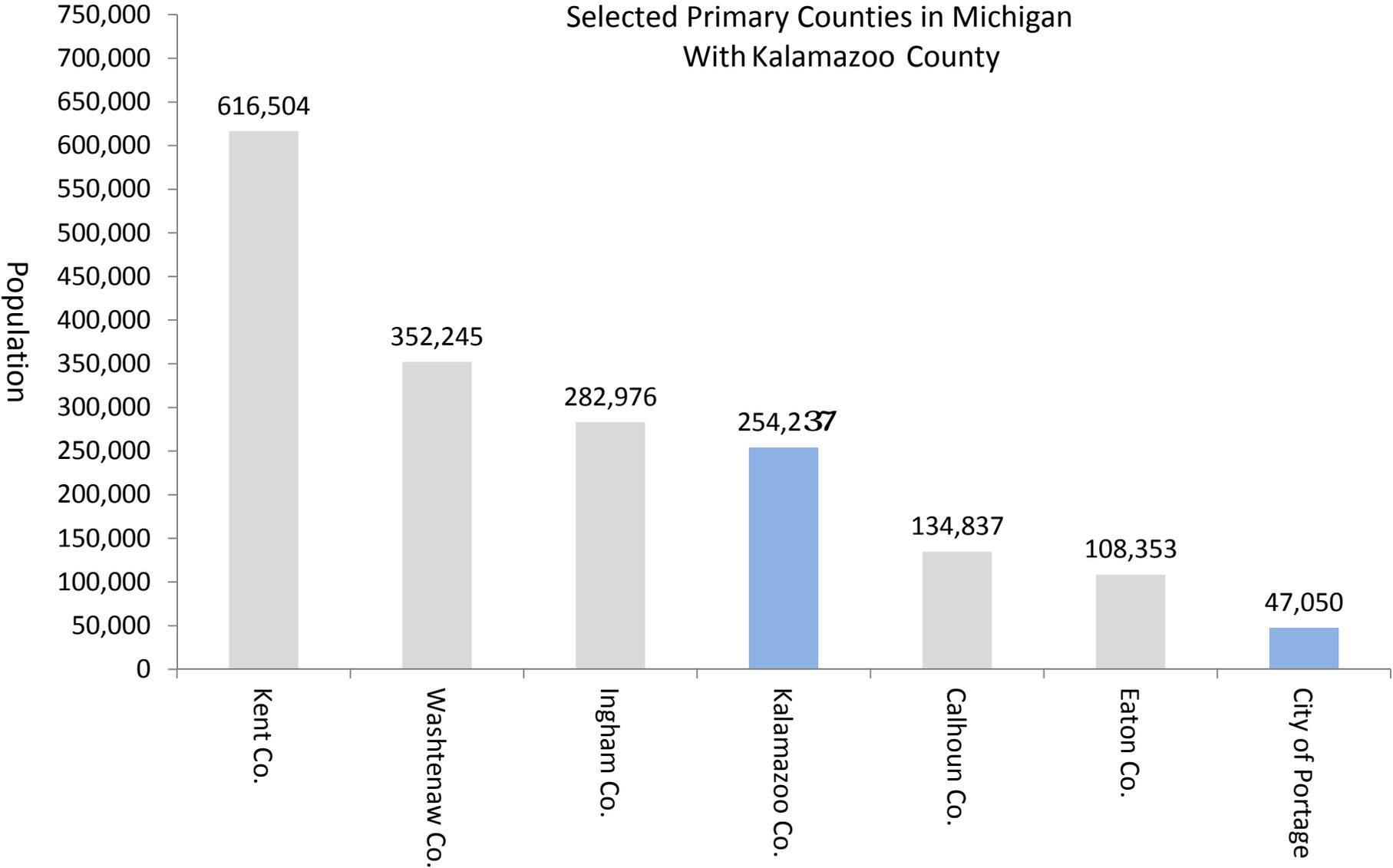
Exhibit C.6

Demographic Variables	Kalamazoo County	City of Portage	Lake Center ETA
Population (#)			
2000	238,603	44,982	16,055
2010	250,331	46,292	17,908
2013	254,237	47,050	18,227
2018	262,512	48,348	19,195
c.a.r. 2000 - 2010	0.5%	0.3%	1.1%
c.a.r. 2010 - 2013	0.5%	0.5%	0.6%
c.a.r. 2013 - 2018	0.6%	0.5%	1.0%
Per Capita Income			
2000	\$21,739	\$25,382	\$26,190
2010	\$25,198	\$28,914	\$29,833
2013	\$27,010	\$30,755	\$31,727
2018	\$31,040	\$35,016	\$35,849
c.a.r. 2000 - 2010	1.5%	1.3%	1.3%
c.a.r. 2010 - 2013	2.3%	2.1%	2.1%
c.a.r. 2013 - 2018	2.8%	2.6%	2.5%

c.a.r. indicates compound annual rate.

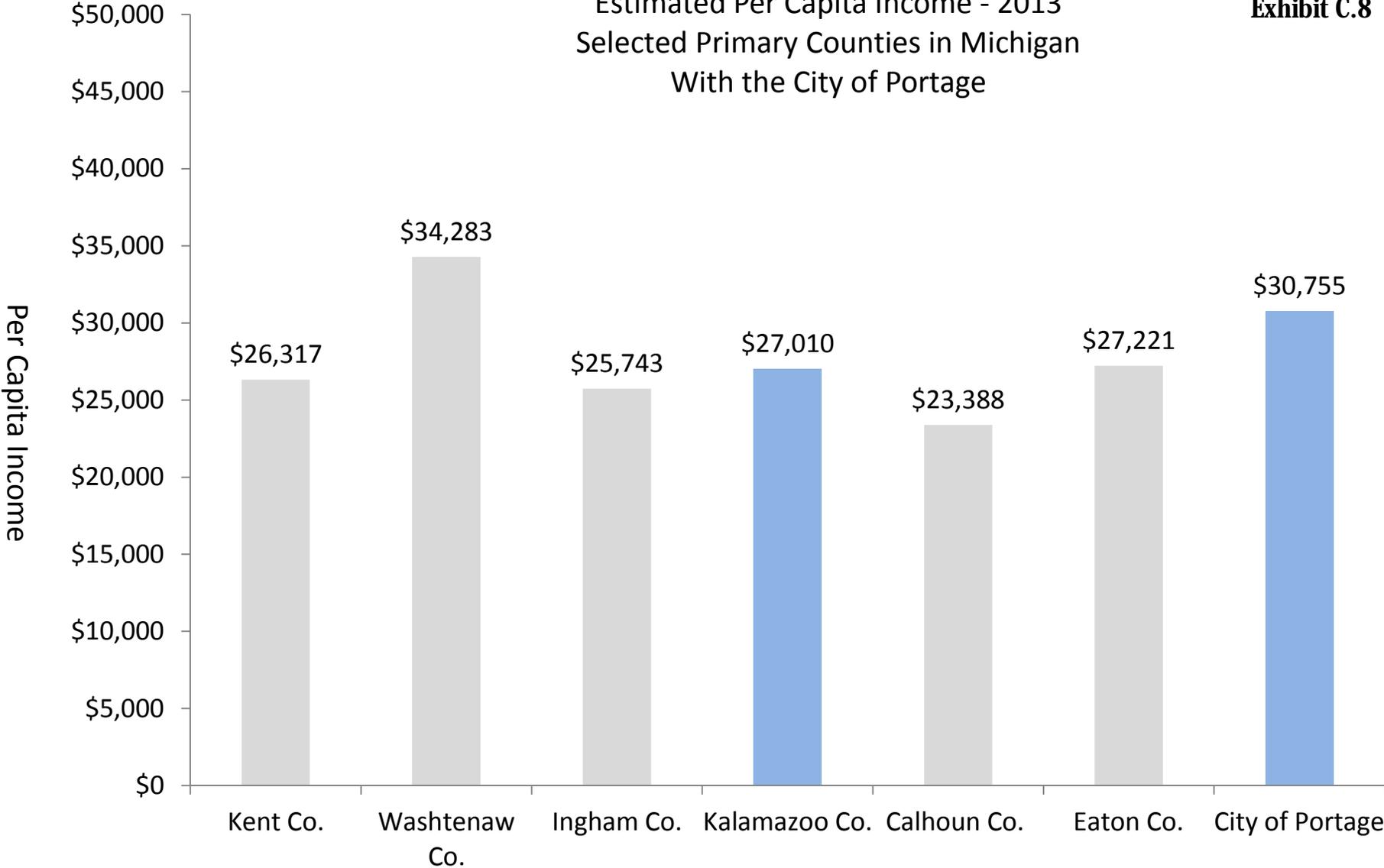
Source: Decennial Census and PopStats provided by Alteryx and DemographicsNow; analysis and exhibit prepared by LandUse|USA; November 2013.

Estimated Population - 2013
Selected Primary Counties in Michigan
With Kalamazoo County



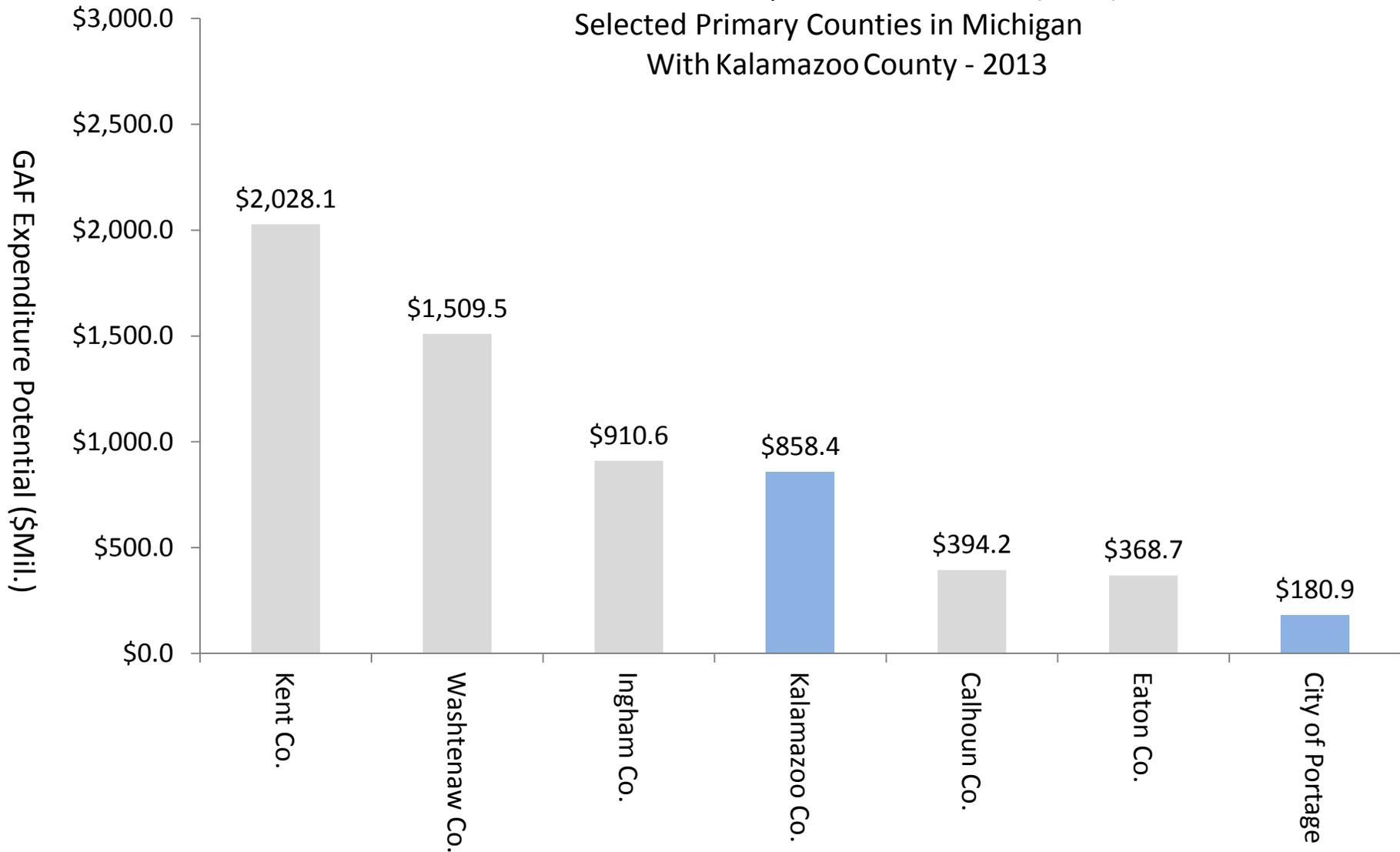
Source: 1990, 2000, and 2010 U.S. Census with estimates and forecasts by DemographicsNow (Alteryx and PopStats) with refinement by LandUse|USA; September 2013.

**Estimated Per Capita Income - 2013
Selected Primary Counties in Michigan
With the City of Portage**



Source: 1990, 2000, and 2010 U.S. Census with estimates and forecasts by DemographicsNow (Alteryx and PopStats) with refinement by LandUse|USA; September 2013.

Estimated GAF Expenditure Potential (\$Mil.)
Selected Primary Counties in Michigan
With Kalamazoo County - 2013



Source: 1990, 2000, and 2010 U.S. Census with estimates and forecasts by DemographicsNow (Alteryx and PopStats) with refinement by LandUse|USA; September 2013. GAF indicates the resident expenditure potential on retail categories that include General Merchandise (G), Apparel (A), and Furniture (F).

Lake Center Effective Trade Area (ETA)
 Compared to the City of Portage and Kalamazoo County, Michigan

Exhibit C.10

Demographic Variables	Kalamazoo County	City of Portage	Lake Center ETA
Median Age of Population	34.1	38.2	42.3
Lifestyle Clusters (Population #)			
E20 No Place Like Home	14,818	6,774	5,392
C11 Aging of Aquarius	20,192	4,598	3,622
E21 Unspoiled Splendor	20,391	0	3,474
J34 Aging in Place	8,938	6,377	1,720
J36 Settled and Sensible	12,407	1,508	1,508
B08 Babies and Bliss	3,697	1,327	1,327
I30 Stockcars and State Parks	19,607	0	1,184
C14 Boomers and Boomerangs	17,664	6,057	0
B09 Family Fun-tastic	12,847	4,638	0
I31 Blue Collar Comfort	9,001	3,962	0
F23 Families Matter Most	5,525	3,690	0
B07 Generational Soup	2,003	2,003	0
O54 Striving Single Scene	8,398	1,667	0
Q62 Reaping Rewards	1,527	1,527	0
M45 Diapers and Debit Cards	8,283	1,150	0
R67 Hope for Tomorrow	6,109	900	0
K40 Bohemian Groove	12,134	872	0

c.a.r. indicates compound annual rate.

Source: Decennial Census and PopStats provided by Alteryx and DemographicsNow; analysis and exhibit prepared by LandUse|USA; November 2013.

Lake Center Effective Trade Area (ETA)
 Compared to the City of Portage and Kalamazoo County, Michigan

Exhibit C.11

Demographic Variables	Kalamazoo County	City of Portage	Lake Center ETA
Lifestyle Clusters (Population %)			
E20 No Place Like Home	5.8%	14.4%	29.6%
C11 Aging of Aquarius	7.9%	9.8%	19.9%
E21 Unspoiled Splendor	8.0%	0.0%	19.1%
J34 Aging in Place	3.5%	13.6%	9.4%
J36 Settled and Sensible	4.9%	3.2%	8.3%
B08 Babies and Bliss	1.5%	2.8%	7.3%
I30 Stockcars and State Parks	7.7%	0.0%	6.5%
C14 Boomers and Boomerangs	6.9%	12.9%	0.0%
B09 Family Fun-tastic	5.1%	9.9%	0.0%
I31 Blue Collar Comfort	3.5%	8.4%	0.0%
F23 Families Matter Most	2.2%	7.8%	0.0%
B07 Generational Soup	0.8%	4.3%	0.0%
O54 Striving Single Scene	3.3%	3.5%	0.0%
Q62 Reaping Rewards	0.6%	3.2%	0.0%
M45 Diapers and Debit Cards	3.3%	2.4%	0.0%
R67 Hope for Tomorrow	2.4%	1.9%	0.0%
K40 Bohemian Groove	4.8%	1.9%	0.0%

c.a.r. indicates compound annual rate.

Source: Decennial Census and PopStats provided by Alteryx and DemographicsNow; analysis and exhibit prepared by LandUse|USA; November 2013.

Lake Center Effective Trade Area (ETA)
 Compared to the City of Portage and Kalamazoo County, Michigan

Exhibit C.12

Demographic Variables	Kalamazoo County	City of Portage	Lake Center ETA
Lifestyle Clusters (Population #)			
O53 Colleges and Cafes	22,743	0	0
L42 Rooted Flower Power	7,648	0	0
D15 Sports Utility Families	7,245	0	0
O52 Urban Ambition	6,060	0	0
S69 Soul Survivors	5,913	0	0
Q65 Senior Discounts	4,271	0	0
O50 Full Steam Ahead	3,018	0	0
R66 Dare to Dream	2,351	0	0
N48 Gospel and Grits	1,989	0	0
A02 Platinum Prosperity	1,368	0	0
S71 Hard Times	1,311	0	0
P56 Rolling the Dice	1,241	0	0
S68 Small Town Shallow Pockets	1,210	0	0
Q64 Town Elders	1,153	0	0
N47 Countrified Pragmatics	908	0	0
L43 Homemade Happiness	863	0	0
O51 Digital Dependents	656	0	0
M44 Red, White and Bluegrass	588	0	0
U99 Unclassified	160	0	0

c.a.r. indicates compound annual rate.

Source: Decennial Census and PopStats provided by Alteryx and DemographicsNow; analysis and exhibit prepared by LandUse|USA; November 2013.



Segment/ Group	Name	Short Description
A	Power Elite	The wealthiest households in the US, living in the most exclusive neighborhoods, and enjoying all that life has to offer
A01	American Royalty	Wealthy, influential and successful couples and families living in prestigious suburbs
A02	Platinum Prosperity	Wealthy and established empty-nesting couples residing in suburban and in-town homes
A03	Kids and Cabernet	Prosperous, middle-aged married couples with children living child-focused lives in affluent suburbs
A04	Picture Perfect Families	Established families of child-rearing households living in wealthy suburbs
A05	Couples with Clout	Middle-aged, childless couples living in affluent metro areas
A06	Jet Set Urbanites	Mix of affluent singles and couples living high-rise, fashionable lives in urban neighborhoods
B	Flourishing Families	Affluent, middle-aged families and couples earning prosperous incomes and living very comfortable, active lifestyles
B07	Generational Soup	Affluent couples and multi-generational families living a wide range of lifestyles in suburbia
B08	Babies and Bliss	Middle-aged couples with large families and active lives in affluent suburbia
B09	Family Fun-tastic	Upscale, middle-aged families with older children pursuing busy kid-centered lives in satellite cities
B10	Asian Achievers	Affluent, mainly Asian couples and families enjoying dynamic lifestyles in metro areas
C	Booming with Confidence	Prosperous, established couples in their peak earning years living in suburban homes
C11	Aging of Aquarius	Upscale boomer-aged couples living in city and close-in suburbs
C12	Golf Carts and Gourmets	Upscale retirees and empty-nesters in comfortable communities
C13	Silver Sophisticates	Mature, upscale couples and singles in suburban homes
C14	Boomers and Boomerangs	Baby boomer adults and their teenage/young adult children sharing suburban homes
D	Suburban Style	Middle-aged, ethnically-mixed suburban families and couples earning upscale incomes
D15	Sports Utility Families	Upscale, middle-aged couples with school-aged children living active family lifestyles in outlying suburbs
D16	Settled in Suburbia	Upper middle-class diverse family units and empty nesters living in established suburbs
D17	Cul de Sac Diversity	Ethnically-diverse, middle-aged families settled in new suburban neighborhoods
D18	Soulful Spenders	Upper middle-class African-American couples and families living in the expanding suburbs
E	Thriving Boomers	Upper-middle-class baby boomer-age couples living comfortable lifestyles settled in town and exurban homes
E19	Full Pockets, Empty Nests	Empty-nesting, upper middle-class households with discretionary income living sophisticated lifestyles
E20	No Place Like Home	Upper middle-class multi-generational households in exurban areas
E21	Unspoiled Splendor	Comfortably established baby boomer couples in town and country communities

F	Promising Families	Young couples with children in starter homes living child-centered lifestyles
F22	Fast Track Couples	Active, young, upper middle-class suburban couples and families living upwardly-mobile lifestyles
F23	Families Matter Most	Young, middle-class families in scenic suburbs leading active, family-focused lives
G	Young, City Solos	Younger and middle-aged singles living active and energetic lifestyles in metropolitan areas
G24	Status Seeking Singles	Younger, upwardly-mobile singles living in mid-scale metro areas leading leisure-intensive lifestyles
G25	Urban Edge	Younger, up-and-coming singles living big city lifestyles located within top CBSA markets
H	Middle-class Melting Pot	Mid-scale, middle-aged and established couples living in suburban and fringe homes
H26	Progressive Potpourri	Mature, multi-ethnic couples with comfortable and active lives in middle-class suburbs
H27	Birkenstocks and Beemers	Upper middle-class, established couples living leisure lifestyles in small towns and cities
H28	Everyday Moderates	Mid-scale, multi-cultural couples and families living in mid-tier metro suburban settings
H29	Destination Recreation	Middle-aged, midscale couples in rural towns and fringe suburbs working to enjoy their active lifestyles
I	Family Union	Mid-scale, middle-aged and somewhat ethnically-diverse families living in homes supported by solid blue-collar occupations
I30	Stockcars and State Parks	Middle-class couples and families living in more remote rural communities
I31	Blue Collar Comfort	Middle-class families in smaller cities and towns with solid blue-collar jobs
I32	Latin Flair	Conventional Hispanic Generation X families located in selected coastal city homes
I33	Hispanic Harmony	Middle-class Hispanic families living lively lifestyles in city-centric neighborhoods
J	Autumn Years	Established, ethnically-diverse and mature couples living gratified lifestyles in older homes
J34	Aging in Place	Middle-class seniors living solid, suburban lifestyles
J35	Rural Escape	Older, middle-class couples and singles living comfortable lives in rural towns
J36	Settled and Sensible	Older, middle-class and empty-nesting couples and singles in city neighborhoods
K	Significant Singles	Middle-aged singles and some couples earning mid-scale incomes supporting active city styles of living
K37	Wired for Success	Young, mid-scale singles and couples living socially-active city lives
K38	Gotham Blend	Mix of middle-aged and middle-class singles and couples living urban New York City-area lifestyles
K39	Metro Fusion	Ethnically-diverse, middle-aged singles living urban active lifestyles
K40	Bohemian Groove	Older divorced and widowed individuals enjoying settled urban lives
L	Blue Sky Boomers	Lower- and middle-class baby boomer-aged households living in small towns
L41	Booming and Consuming	Older empty-nesting couples and singles enjoying relaxed lives in small towns
L42	Rooted Flower Power	Mid-scale baby boomer singles and couples rooted in established suburban communities and approaching retirement
L43	Homemade Happiness	Lower middle-class baby boomer households living in remote town and country homes
M	Families in Motion	Younger, working-class families earning moderate incomes in smaller residential communities
M44	Red, White and Bluegrass	Lower middle-income rural families with diverse adult and children household dynamics
M45	Diapers and Debit Cards	Young, working-class families and single parent households living in small established, city residences
N	Pastoral Pride	Eclectic mix of lower middle-class widowed and divorced individuals and couples who have settled in country and small town areas
N46	True Grit Americans	Older, middle-class households in town and country communities located in the nation's midsection

N47	Countrified Pragmatics	Lower middle-income couples and singles living rural, casual lives
N48	Gospel and Grits	Lower middle-income African-American multi-generational families living in small towns
N49	Work Hard, Pray Hard	Working-class, middle-aged couples and singles living in rural homes
O	Singles and Starters	Young singles starting out, and some starter families, in diverse urban communities
O50	Full Steam Ahead	Younger and middle-aged singles gravitating to second-tier cities
O51	Digital Dependents	Mix of Generation Y and X singles who live digital-driven, urban lifestyles
O52	Urban Ambition	Mainly Generation Y African-American singles and single families established in mid-market cities
O53	Colleges and Cafes	Young singles and recent college graduates living in college communities
O54	Striving Single Scene	Young, multi-ethnic singles living in Midwest and Southern city centers
O55	Family Troopers	Families and single-parent households living near military bases
P	Cultural Connections	Diverse, mid- and low-income families in urban apartments and residences
P56	Rolling the Dice	Middle-aged, mid-scale income singles and divorced individuals in secondary cities
P57	Meager Metro Means	Mid-scale African-American singles established in inner-city communities
P58	Fragile Families	Multi-cultural singles and families with mid and low incomes living settled lives in urban apartments
P59	Nuevo Horizons	Middle-aged, mid-scale income Hispanic families living mainly within US border cities
P60	Ciudad Strivers	Mid-scale Hispanic families and single parents in gateway communities
P61	Humble Beginnings	Multi-ethnic singles and single-parent households with mid-scale incomes in city apartments
Q	Golden Year Guardians	Retirees living in settled residences and communities
Q62	Reaping Rewards	Relaxed, retired couples and widowed individuals in suburban homes living quiet lives
Q63	Footloose and Family Free	Elderly couples and widowed individuals living active and comfortable lifestyles
Q64	Town Elders	Stable, minimalist seniors living in older residences and leading sedentary lifestyles
Q65	Senior Discounts	Downscale, settled retirees in metro apartment communities
R	Aspirational Fusion	Multi-cultural, low-income singles and single parents living in urban locations and striving to make a better life
R66	Dare to Dream	Young singles, couples and single parents with lower incomes starting out in city apartments
R67	Hope for Tomorrow	Young, lower-income African-American single parents in second-city apartments
S	Struggling Societies	Economically challenged mix of singles, divorced and widowed individuals in smaller cities and urban areas looking to make ends meet
S68	Small Town Shallow Pockets	Older, down-scale singles and empty-nesters living in modest ex-urban small towns
S69	Soul Survivors	Older, down-scale African-Americans singles and single parents established in modest urban neighborhoods
S70	Enduring Hardships	Middle-aged, down-scale singles and divorced individuals in transitional small town and ex-urban apartments
S71	Hard Times	Older, down-scale and ethnically-diverse singles typically concentrated in inner-city apartments

Exhibit C.15



© 2011 Experian Information Solutions, Inc. • All rights reserved

Experian and the marks used herein are service marks or registered trademarks of Experian Information Solutions, Inc.

Other product and company names mentioned herein may be the trademarks of their respective owners.

April 2011

Experian Marketing Services
955 American Lane
Schaumburg, IL 601731
888.219.1817
www.experian.com/mosaic