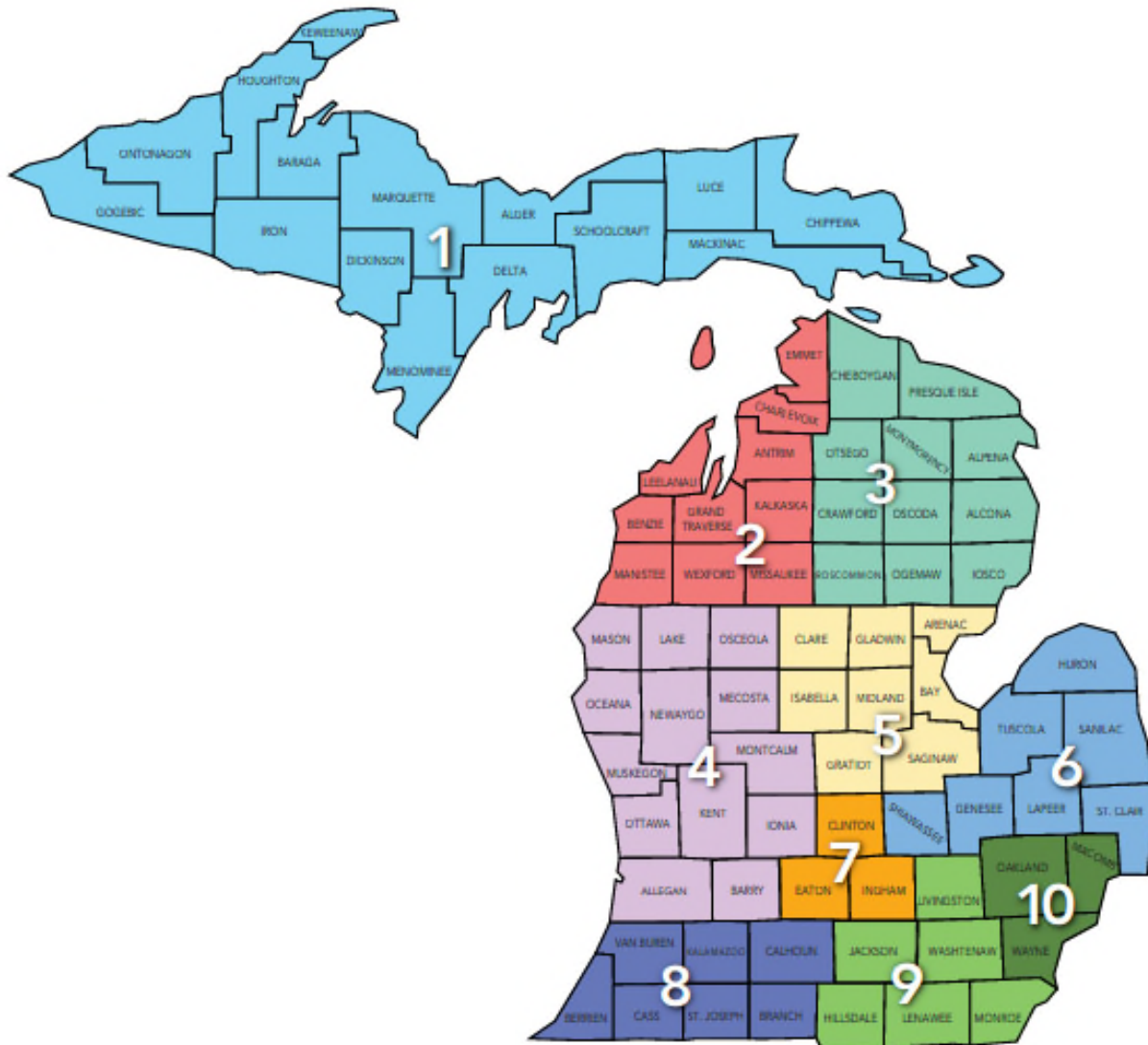




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Welcome to the TMA Tutorial!

Project Manager – Jane Fitzpatrick



Jane Fitzpatrick
Programs Manager

Sue Fortune
Executive Director



Welcome to the TMA Tutorial!

TMA Consultant – Sharon Woods



Sharon Woods, CRE | Principal
TMA Team Leader
LandUse|USA



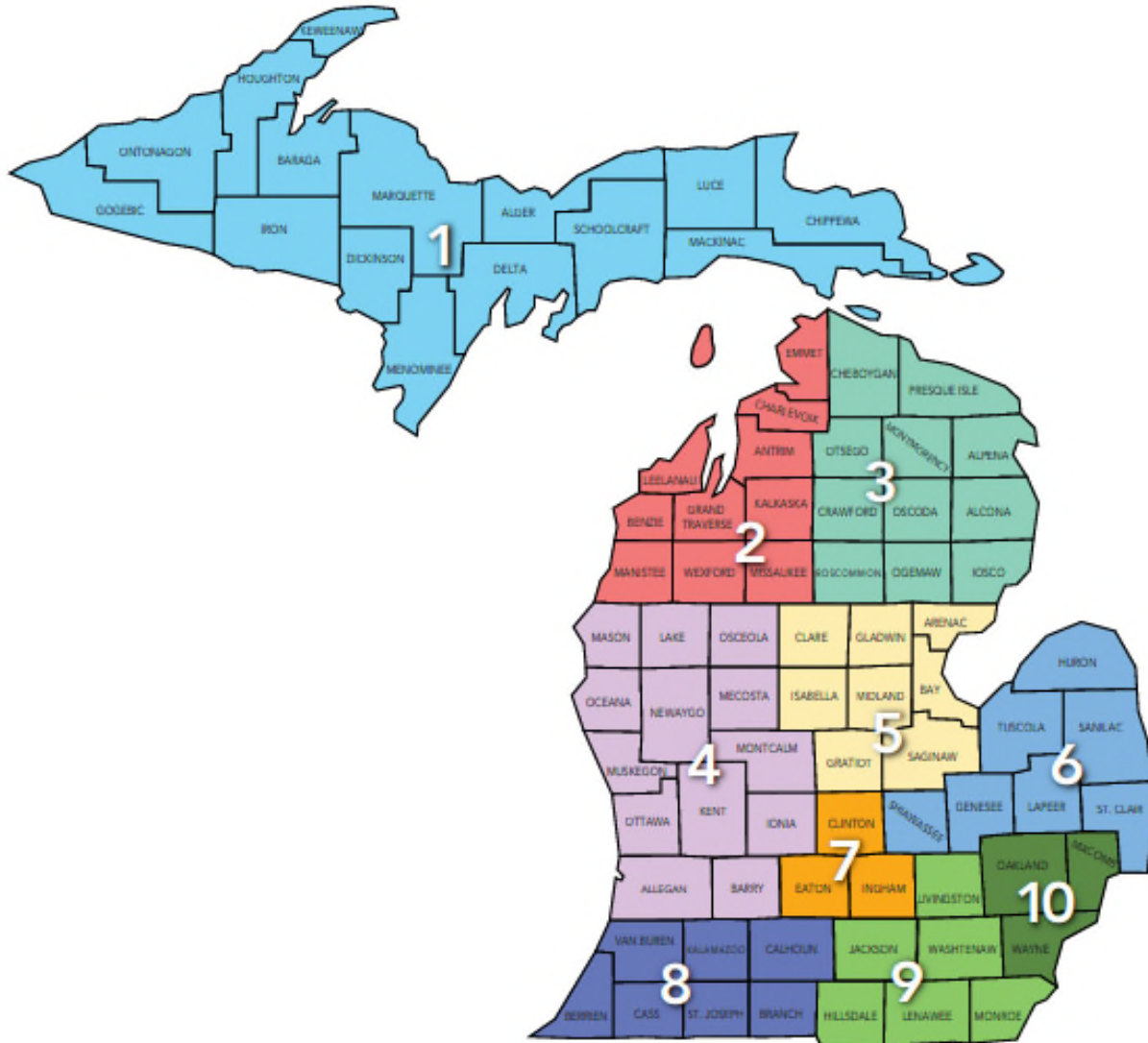
Ryan E. Griffith | Principal
TMA Consultant
Growing Home Design



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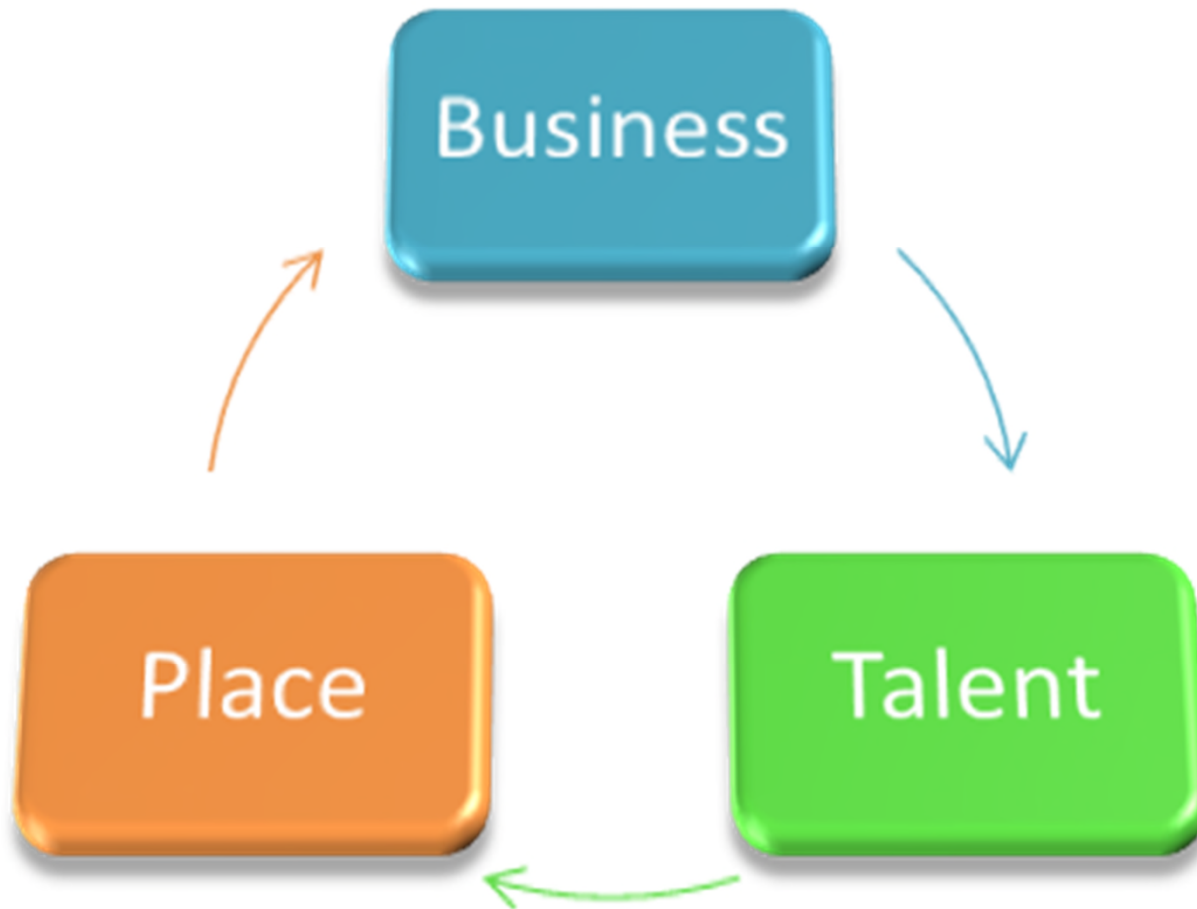
Welcome to the TMA Tutorial!

State Specialist – James Espinoza



James Espinoza
CA Team – Region 5

Nate Scramlin
CA Team – Region 7



Business needs Talent / Talent wants Place / Place needs Businesses

MIPlace Components

Policy

Implementation

Education & Training

Placemaking Curriculum

Key Real Estate Development Elements

- ***Land*** | Sites | Real Estate
- ***Market*** | Demand | Potential
- ***Products*** | Smart Plans

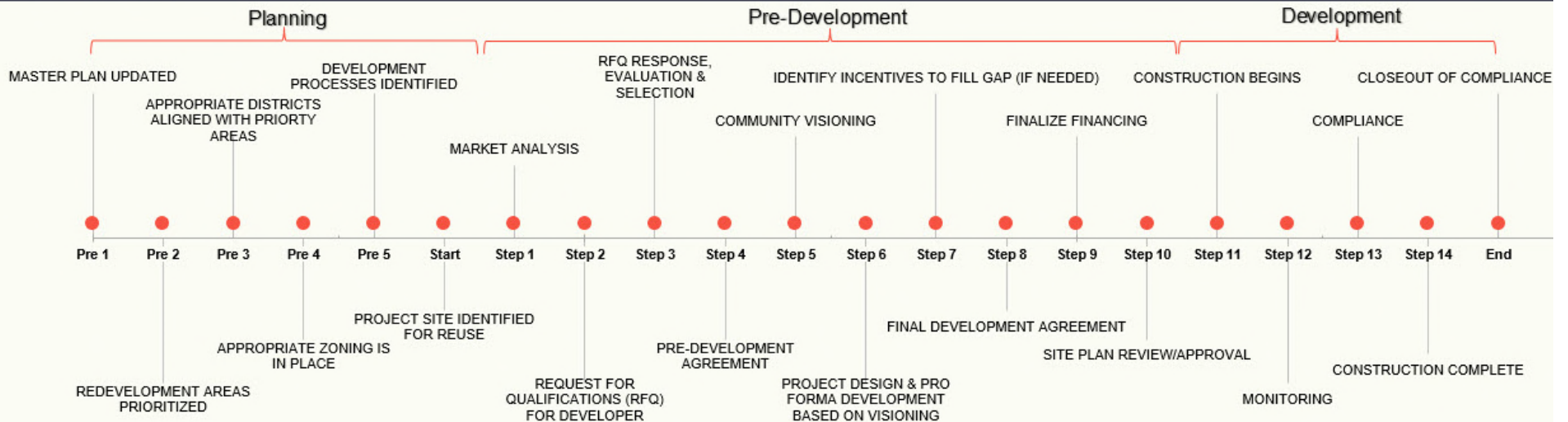




Development Task-line

Municipal-Led Placemaking Project

Task Line





Welcome to the TMA Tutorial!

TMA Tutorial – Sharon Woods



Sharon Woods, CRE | Principal
TMA Team Leader
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(517) 290-5531
sharonwoods@landuseusa.com



3 Most Important Questions Phone Interviews – Ryan Griffith

Growing
home
design

Ryan E. Griffith | Principal
Growing Home Design
growinghomedesign@gmail.com
(717) 215-7541

1. Attached Housing Choices
2. Investment Opportunities
3. Major Economic Events

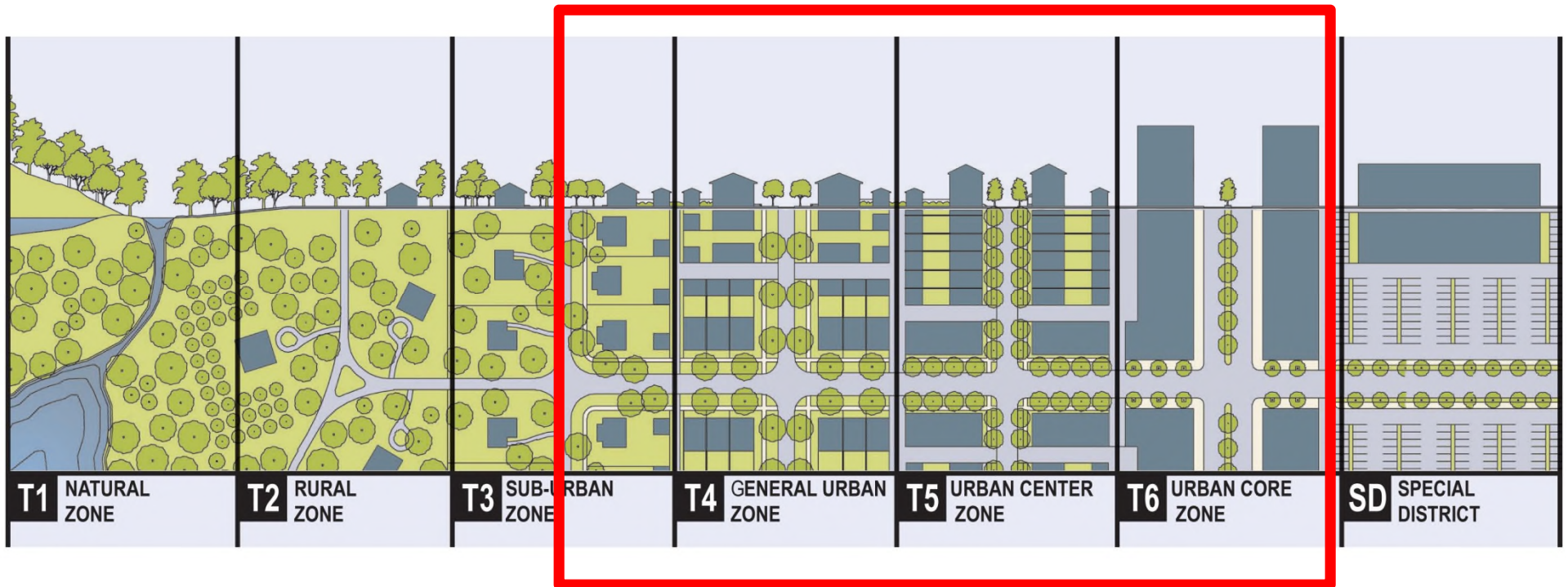


Target Market Analysis – Urban Focus

DOWNTOWNS, URBAN DISTRICTS, CORRIDORS

Downtown + Street Grid + Compact + Sense of Place

Follows the place types of the Urban Transect





Retail TMA | Objectives

RETAIL CHOICES – Residents living in and near Downtowns need convenient (walkable!) choices that meet their lifestyle preferences and household needs.

Grocery Stores

Pharmacies

Hardware

Apparel, Shoes

Restaurants

Entertainment Venues

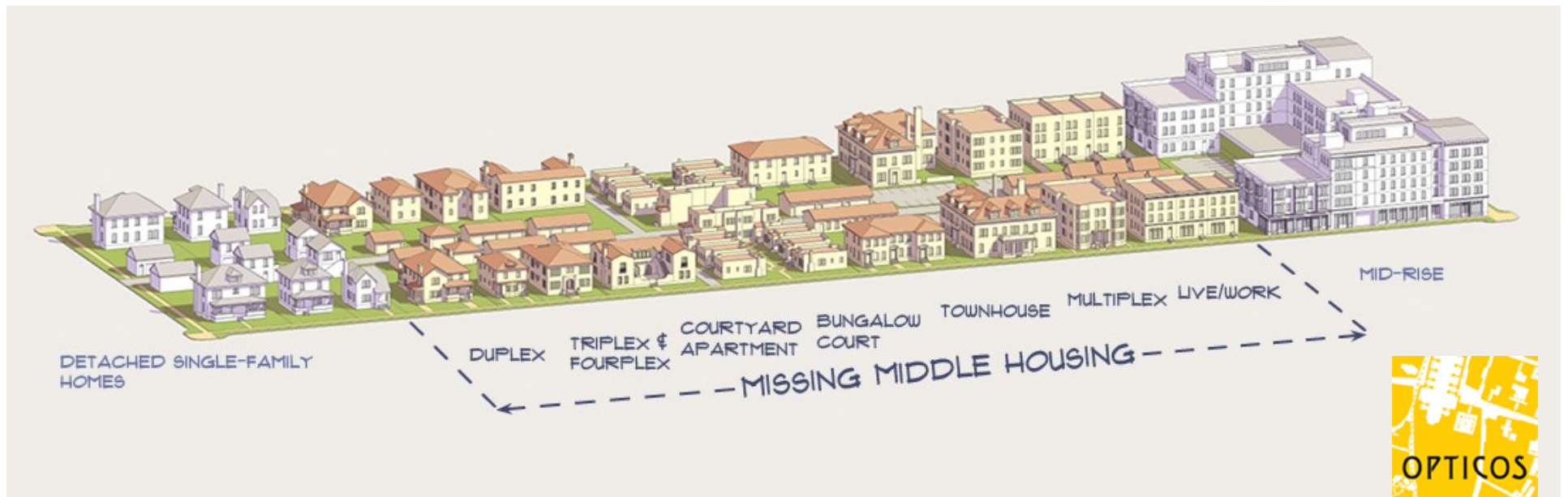
Health & Fitness Centers





www.MissingMiddleHousing.com

Duplexes, triplexes, fourplexes, townhouses, other multiplexes, row houses, townhouses, condominiums, mid-rises, flats / lofts.
(And unit sizes in square feet, \$ contract rents, \$ home values)





Migration and Movership Rates

A study of households who are moving into and within each county, city, and village.

(Rather than settled households who are not moving).





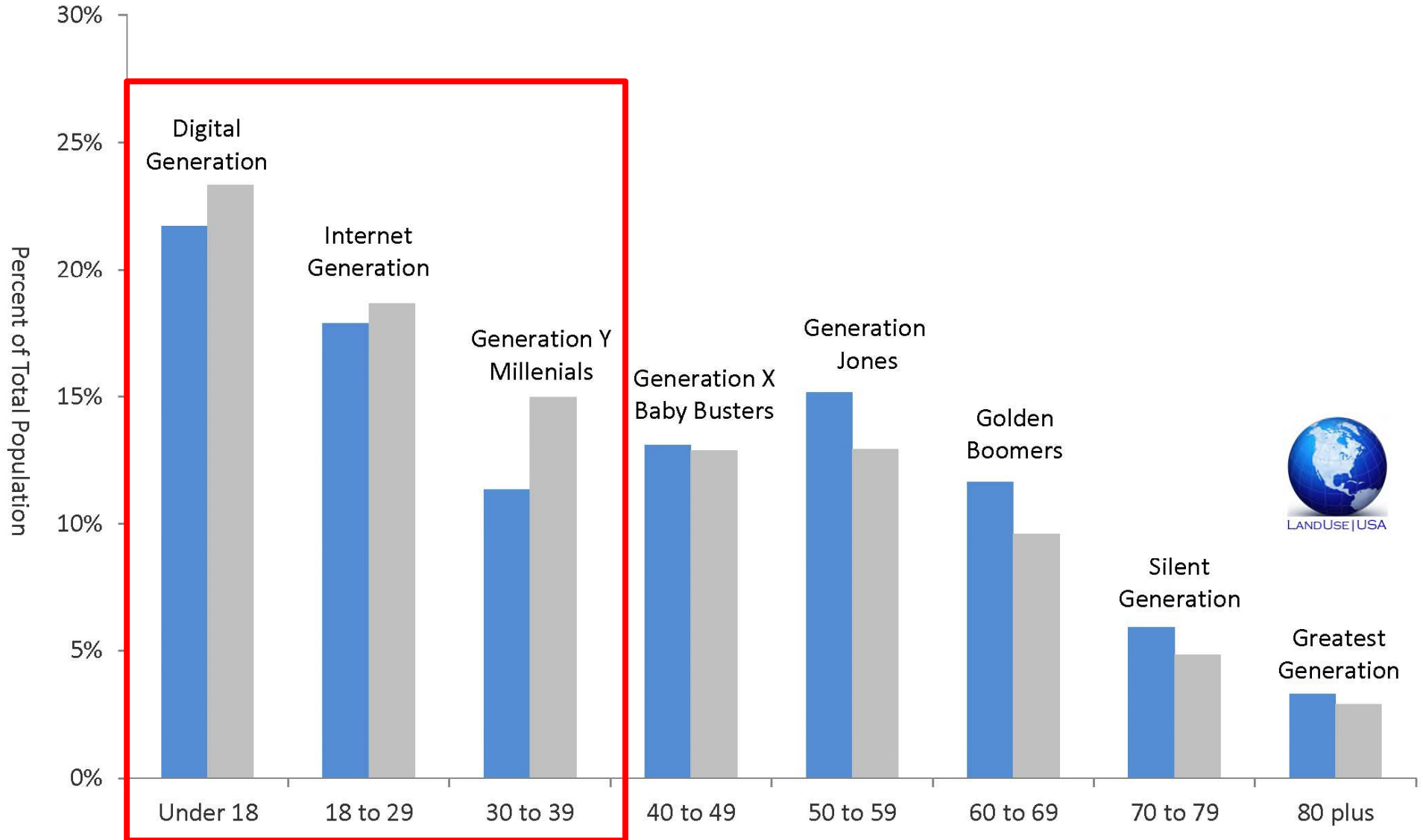
Lifestyle Clusters, Target Markets

Identifying lifestyle preferences of the target markets, particularly for residential building formats in urban places.





Demographic Shifts over Time





Here Come the Millennials – Ages 20-35

Coach Beats Michael Kors • 14 Beware Boeing • 16 Don't Give Up on Apple • 31 Stocks Up 1.7% on Week • M3

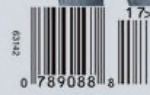
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The Dow Jones Business and Financial Weekly Vol. XCIII No. 17 barrons.com April 29, 2013 \$5.00 Special Ad Section Page M31

HERE COME THE MILLENNIALS

Ages 18 to 37, this group is bigger than the baby-boom generation and finally poised to start spending. What it means for the economy, from housing and autos to banking and tech.



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Barron's
April 2013



... Step Aside, Millennials

“Born in 1990 or after, Gen Z makes up about 25% of the U.S. population. They are well-educated, tech-innate, and avid multitaskers. Growing up in the aftermath of 9/11 and the economic recession, they tend to be more fiscally and socially responsible. They consider themselves mini-entrepreneurs and inventors who will make a difference in the world. This is probably the smartest generation and they will be the ones to change and save the world.”





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What Do They Want?





Mosaic | Prizm | Tapestry | Landscape

Brand Name Providers

- **Mosaics** Experian | SitesUSA
- Prizms Nielsen | Claritas
- Tapestries ESRI | ArcGIS
- Landscapes MediaMark | Synergos



Contact us:



 **Experian**
Marketing Services



LANDUSE|USA

Subscription-Based Data Portal





71 Lifestyle Clusters (Nationwide)

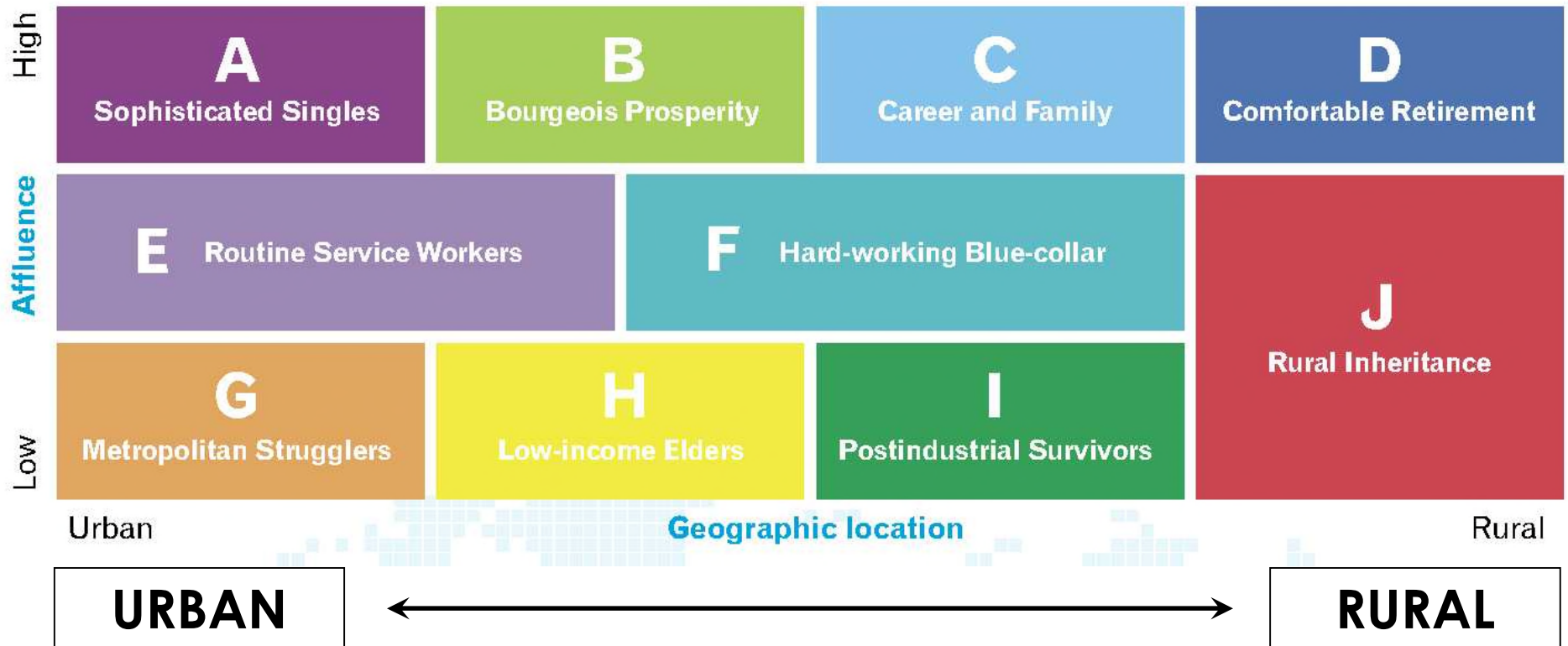
| | | | | | | | | | | |
|----------|-----------------------------------|----------|----------------------------|-------|----------|--------------------------------|---------------------------|------------------------------|-----------------------|------------------|
| A | Power Elite 5.19% | A01 | American Royalty | 1.20% | K | Significant Singles 4.64% | K37 | Wired for Success | 0.89% | |
| | | A02 | Platinum Prosperity | .97% | | | K38 | Gotham Blend | 1.18% | |
| | | A03 | Kids and Cabernet | .78% | | | K39 | Metro Fusion | .49% | |
| | | A04 | Picture Perfect Families | .79% | | | K40 | Bohemian Groove | 2.08% | |
| | | A05 | Couples with Clout | .78% | | L | Blue Sky Boomers 6.82% | L41 | Booming and Consuming | .99% |
| | | A06 | Jet Set Urbanites | .67% | | | | L42 | Rooted Flower Power | 3.10% |
| B | Flourishing Families 4.25% | B07 | Generational Soup | 1.09% | L43 | | | Homemade Happiness | 2.72% | |
| | | B08 | Babies and Bliss | 1.36% | M | Families in Motion 3.13% | M44 | Red, White and Bluegrass | 1.70% | |
| | | B09 | Family Fun-tastic | 0.98% | | | M45 | Diapers and Debit Cards | 1.43% | |
| | | B10 | Cosmopolitan Achievers | 0.82% | N | Pastoral Pride 4.77% | N46 | True Grit Americans | 1.44% | |
| C | Booming with Confidence 6.65% | C11 | Aging of Aquarius | 2.85% | | | N47 | Countrified Pragmatics | 1.16% | |
| | | C12 | Golf Carts and Gourmets | .57% | | | N48 | Rural Southern Bliss | 1.32% | |
| | | C13 | Silver Sophisticates | 1.84% | | | N49 | Touch of Tradition | .86% | |
| | | C14 | Boomers and Boomerangs | 1.40% | O | Singles and Starters 9.85% | O50 | Full Steam Ahead | .58% | |
| D | Suburban Style 5.00% | D15 | Sports Utility Families | 1.59% | | | O51 | Digital Dependents | 3.27% | |
| | | D16 | Settled in Suburbia | .89% | | | O52 | Urban Ambition | 1.23% | |
| | | D17 | Cul de Sac Diversity | .77% | | | O53 | Colleges and Cafes | .81% | |
| | | D18 | Suburban Attainment | 1.74% | | | O54 | Striving Single Scene | 2.14% | |
| E | Thriving Boomers 6.43% | E19 | Full Pockets, Empty Nests | 1.48% | | | O55 | Family Troopers | 1.81% | |
| | | E20 | No Place Like Home | 2.29% | P | Cultural Connections 5.17% | P56 | Mid-scale Medley | 1.10% | |
| | | E21 | Unspoiled Splendor | 2.66% | | | P57 | Modest Metro Means | .82% | |
| F | Promising Families 3.23% | F22 | Fast Track Couples | 1.92% | | | P58 | Heritage Heights | .58% | |
| | | F23 | Families Matter Most | 1.31% | | | P59 | Expanding Horizons | 1.22% | |
| | | G | Young, City Solos 2.46% | G24 | | | Status Seeking Singles | 1.25% | P60 | Striving Forward |
| G25 | Urban Edge | | | 1.21% | | | P61 | Humble Beginnings | .52% | |
| H | Middle-class Melting Pot 3.90% | H26 | Progressive Potpourri | 1.22% | Q | Golden Year Guardians 9.01% | Q62 | Reaping Rewards | 1.81% | |
| | | H27 | Birkenstocks and Beemers | 1.18% | | | Q63 | Footloose and Family Free | .49% | |
| | | H28 | Everyday Moderates | .73% | | | Q64 | Town Elders | 4.65% | |
| | | H29 | Destination Recreation | .77% | | | Q65 | Senior Discounts | 2.06% | |
| I | Family Union 4.74% | I30 | Stockcars and State Parks | 1.40% | | | R | Aspirational Fusion 2.92% | R66 | Dare to Dream |
| | | I31 | Blue Collar Comfort | 1.16% | R67 | Hope for Tomorrow | | | 1.24% | |
| | | I32 | Steadfast Conventionalists | 1.08% | S | Economic Challenges 4.50% | S68 | Small Town Shallow Pockets | 1.75% | |
| | | I33 | Balance and Harmony | 1.09% | | | S69 | Urban Survivors | 1.62% | |
| J | Autumn Years 7.35% | J34 | Aging in Place | 2.64% | | | S70 | Tight Money | .28% | |
| | | J35 | Rural Escape | 2.88% | | | S71 | Tough Times | .84% | |
| | | J36 | Settled and Sensible | 1.83% | | | | | | |



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Urban v. Rural Mosaic

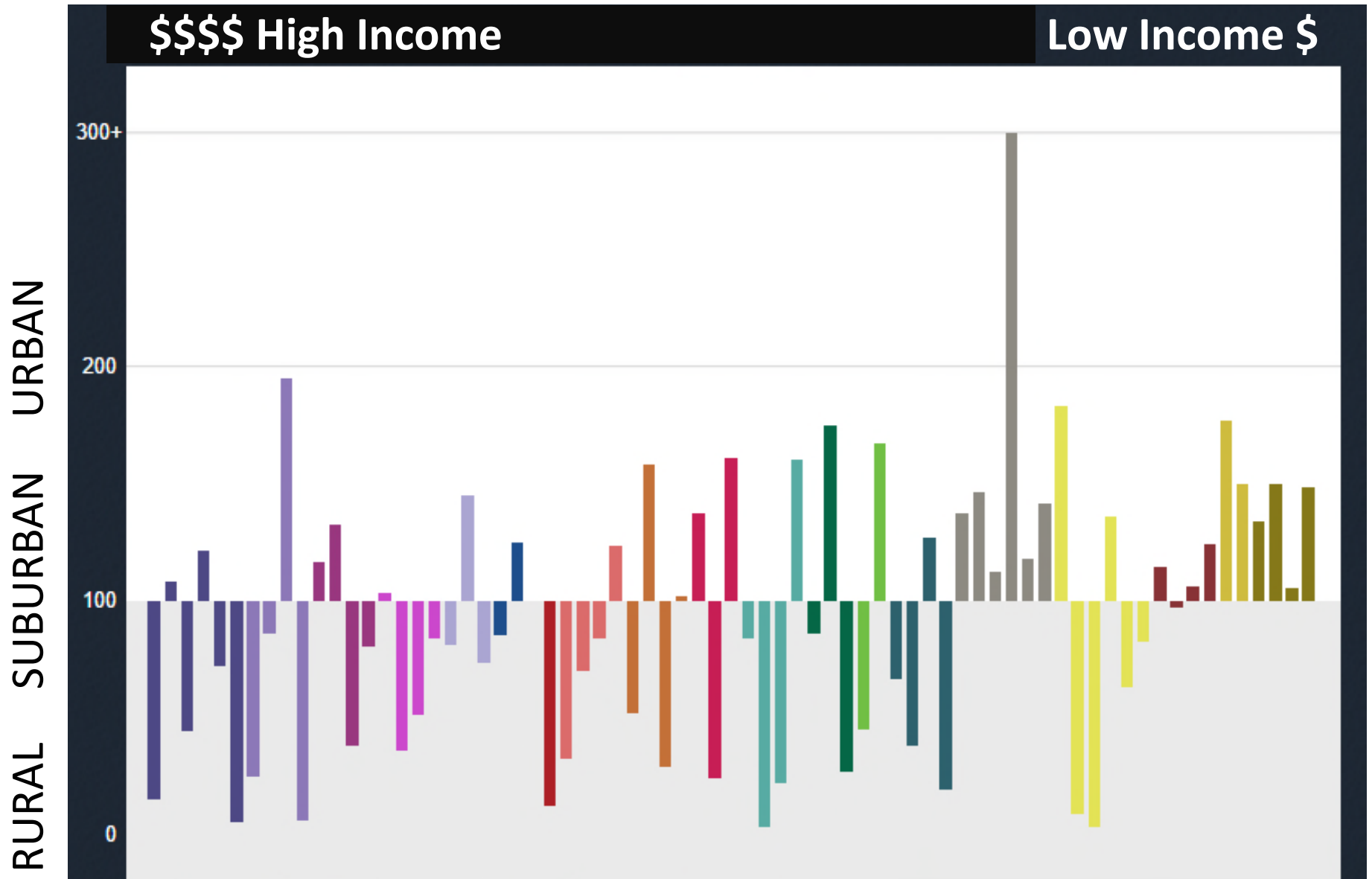
The Mosaic Global groups are mapped against two dimensions:
affluence and geographic location



Mosaic USA Segmentation



Urbanicity | Rural to Urban





How Experian Collects the Data

- ❑ Consumer behavior in the **MORTGAGE** and **CREDIT** markets. Home values from new mortgages; plus trends in home equity loans, refinancing, and/or foreclosures.
- ❑ Tracking of **LIFE EVENTS**. Change of address, purchase of a new home or car, new additions to the family, change in marital status, etc.
- ❑ **SOCIO-ECONOMIC** Data – U.S. Census and ACS estimates. Income, Family Size, Age, Ethnicity, Education, etc.



How Experian Collects the Data

❑ Consumer behavior in the **RETAIL** and **CREDIT** markets.

Catalog subscriptions, credit, and debt; credit card transactions; credit limits; purchases on installment plans; and debt payments and transfers.





Experian: Consumer Reporting Agency

September 15, 2014

DEAR SHARON WOODS:

Why we're writing you

Welcome! You have been approved for a My Best Buy™ Credit Card Preferred account. Your card will arrive within the next several days.

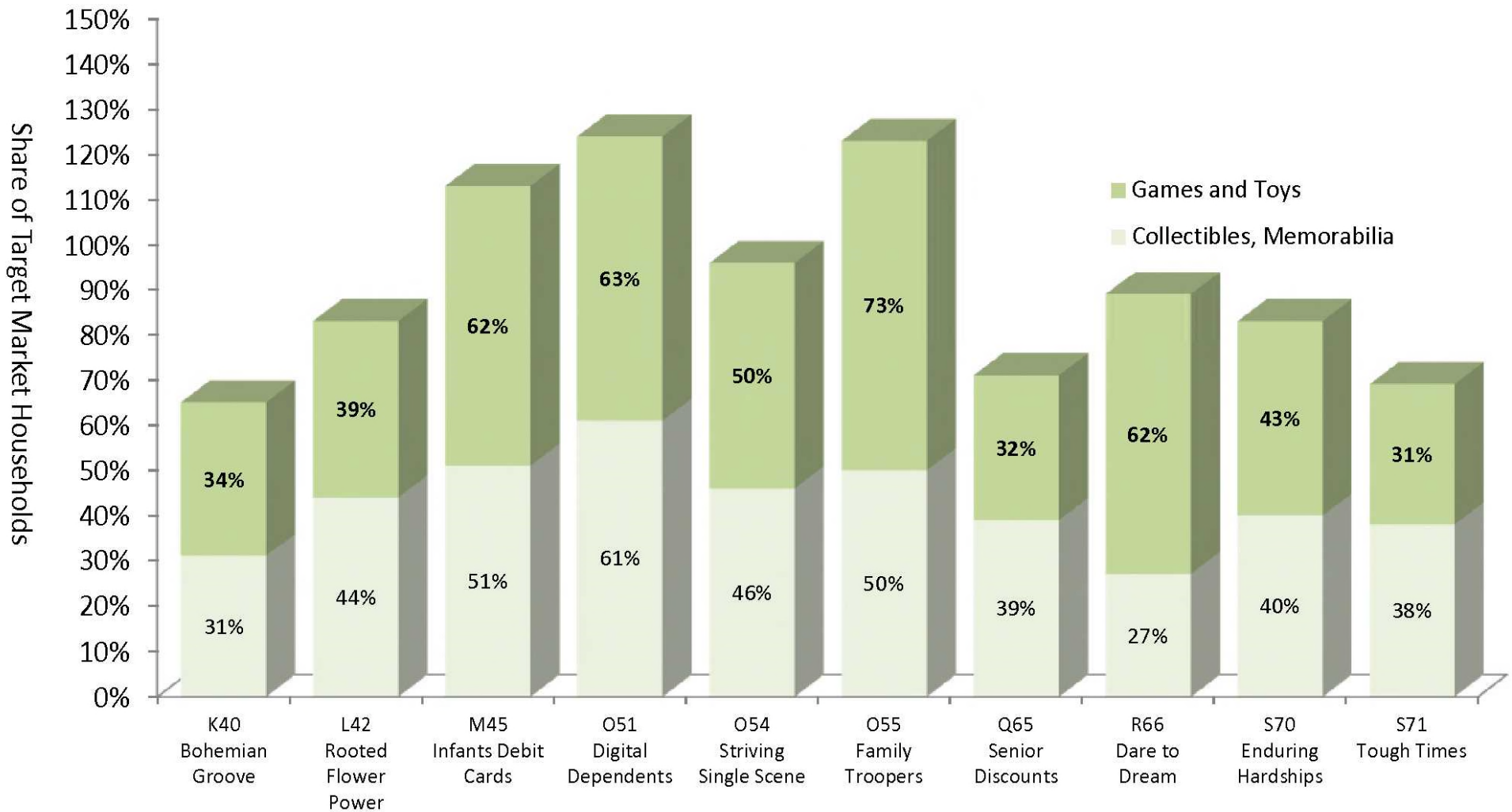
Our credit decision was based, in whole or in part, on information obtained in a report from the following consumer reporting agency:

Experian
P.O. Box 2002
Allen, TX 75013-0036
1-888 EXPERIAN (1-888-397-3742)
www.experian.com





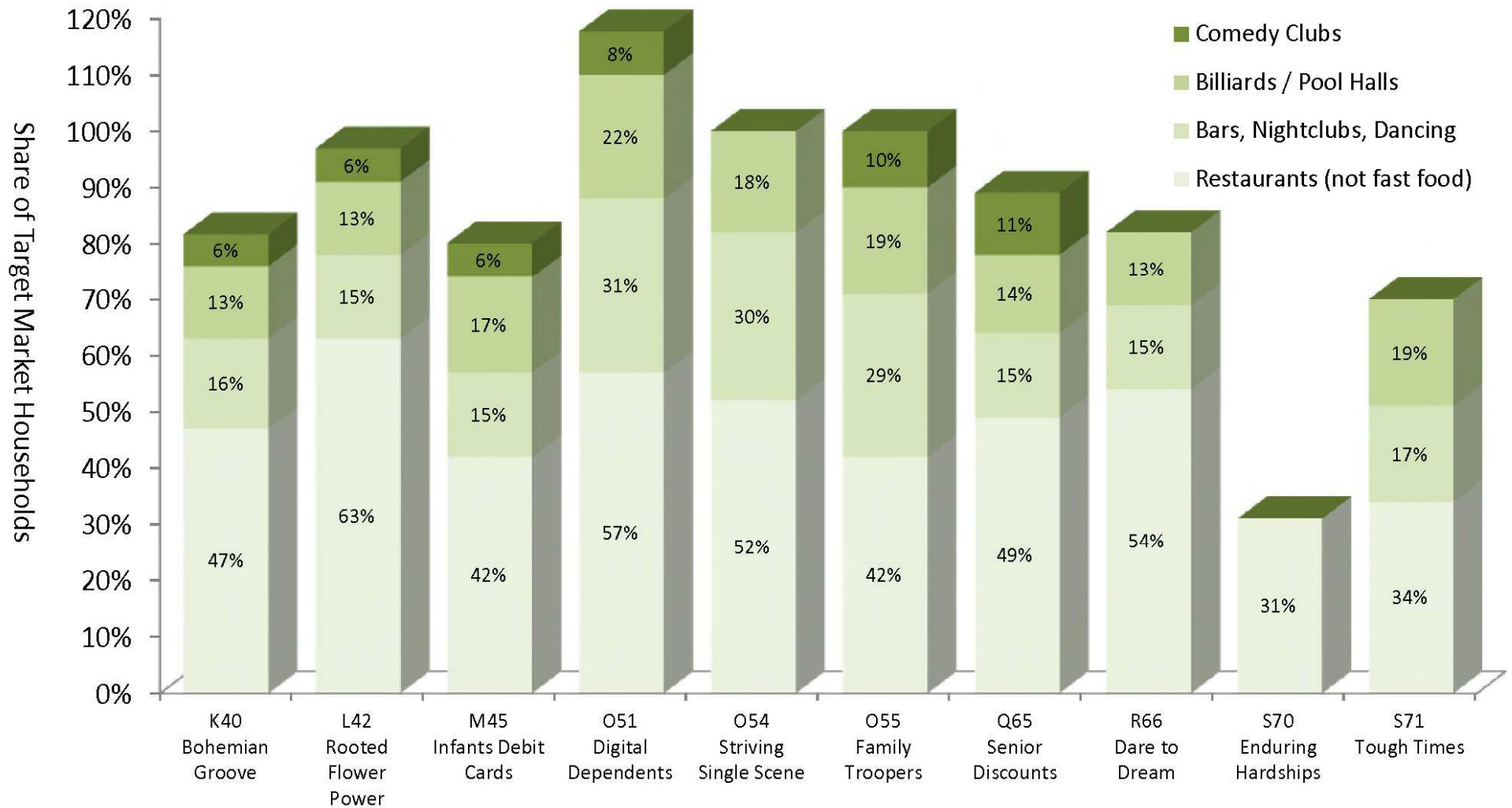
Retail TMA | Games, Toys, Collectibles





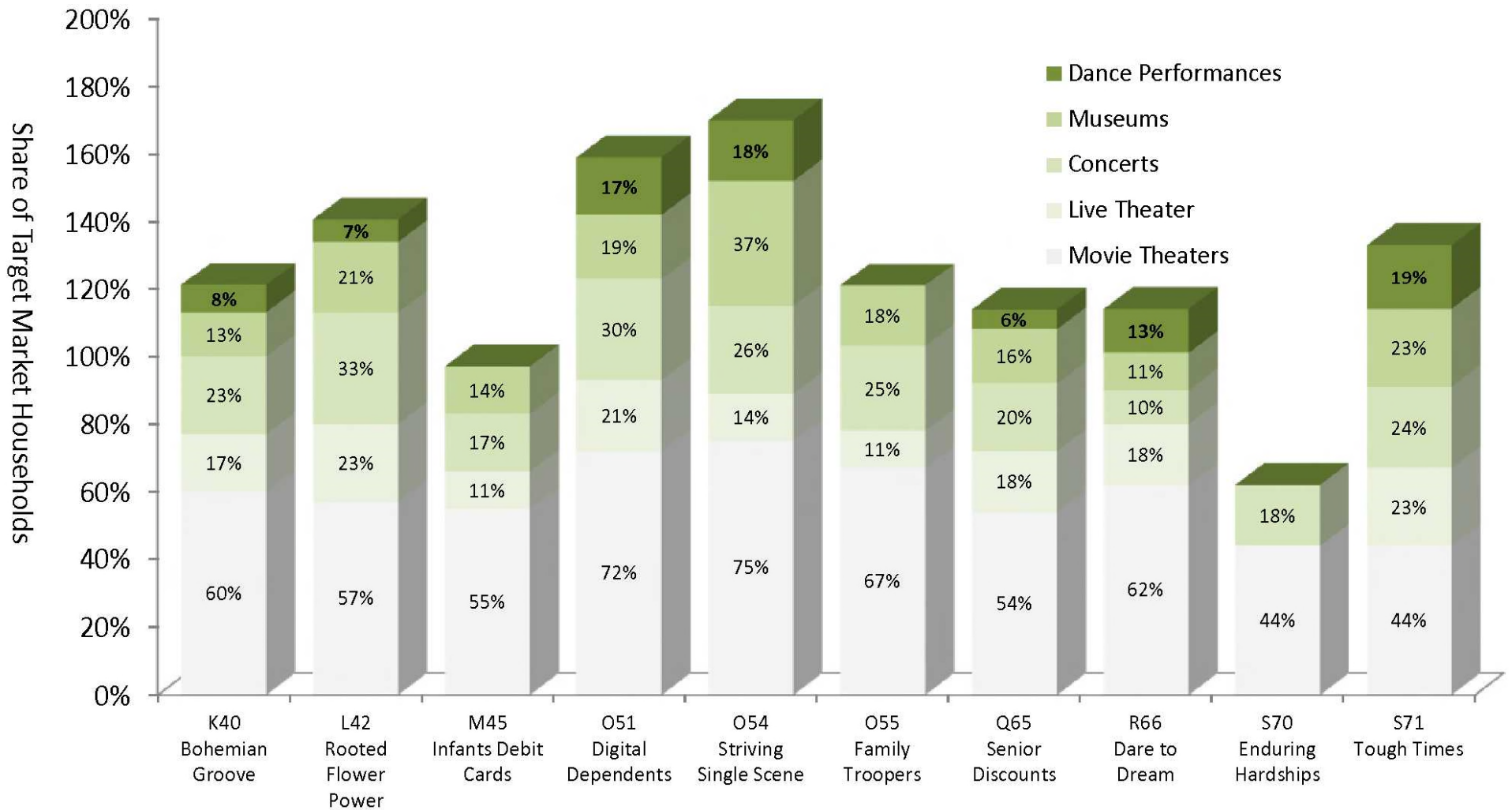
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Retail TMA | Restaurants, Clubs



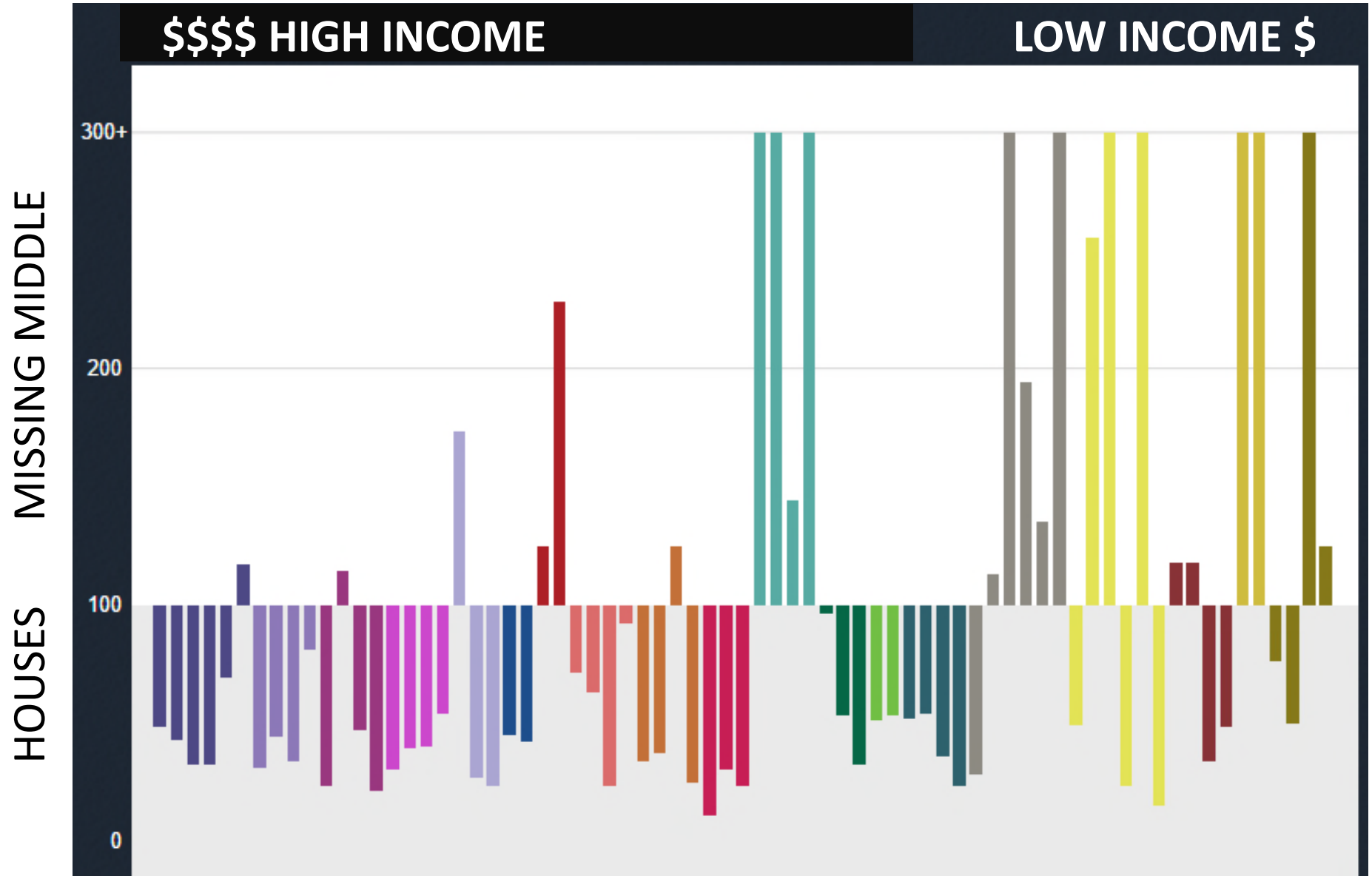


Retail TMA | Entertainment Venues





Missing Middle Housing Formats





Movership Rates | Building Sizes

Lifestyle Preferences for Selected Target Markets
United States Averages - 2014

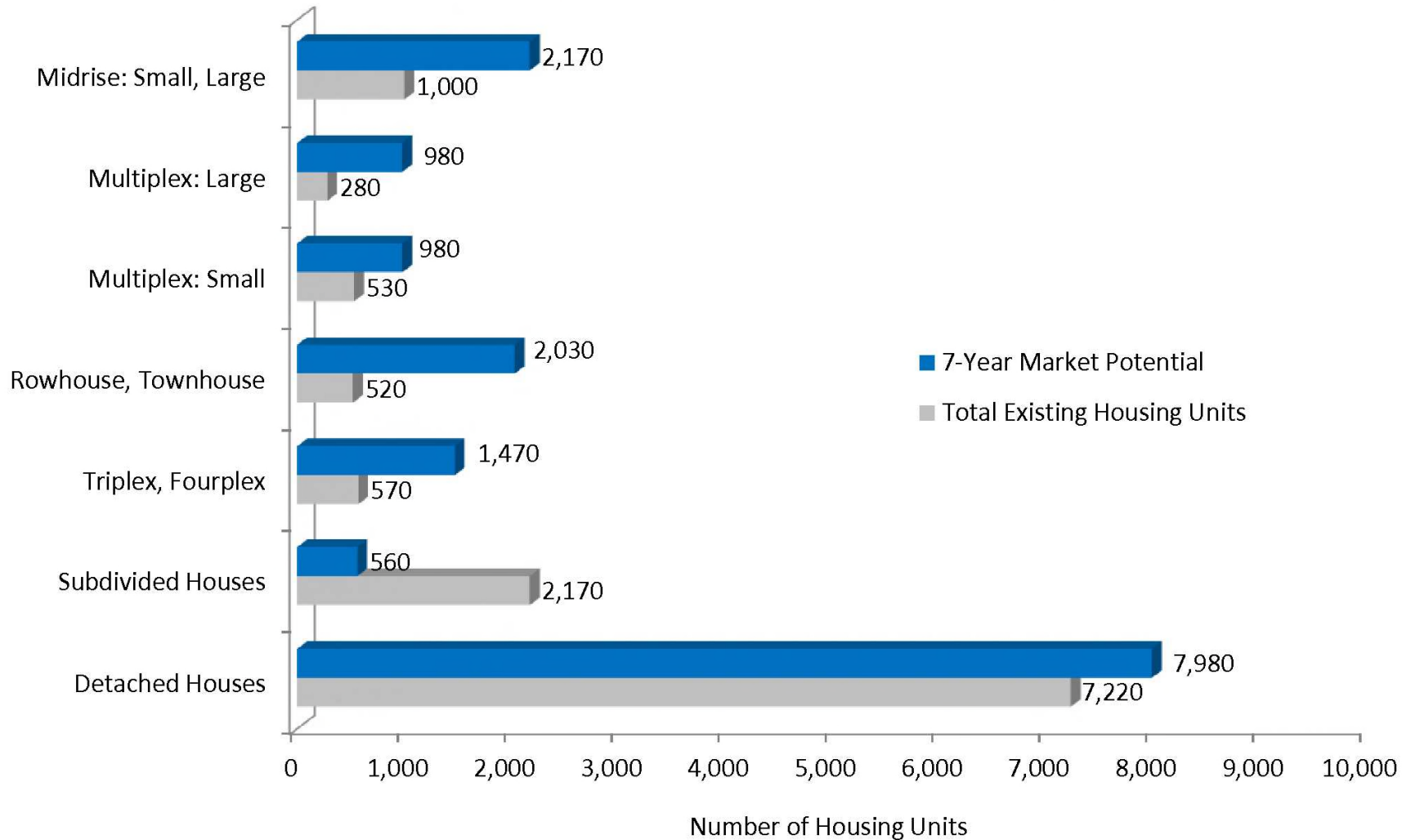
| Target Market Lifestyle Cluster Name | Lifestyle Cluster Code | Share Renter Occupied | Annual Movership Rate | Share in Buildings 3+ Units |
|---|------------------------------|-----------------------------|-----------------------------|-----------------------------------|
| U.S. Averages | A01 - S71 | 33.1% | 14.2% | 27.7% |
| Urban Edge | G25 | 76.8% | 26.4% | 89.8% |
| Wired for Success | K37 | 75.2% | 39.2% | 81.0% |
| Colleges and Cafes | O53 | 79.4% | 27.8% | 55.6% |
| Striving Single Scene | O54 | 95.4% | 49.2% | 96.0% |
| Full Pocket Empty Nests | E19 | 17.2% | 7.0% | 45.8% |
| Bohemian Groove | K40 | 83.9% | 24.4% | 74.0% |



The City of Holland

7 Year Potential v. Existing Units

7-Year Market Potential v. Total Existing Housing Units
Houses v. Missing Middle Formats
All 71 Lifestyle Clusters - The City of Holland, Michigan

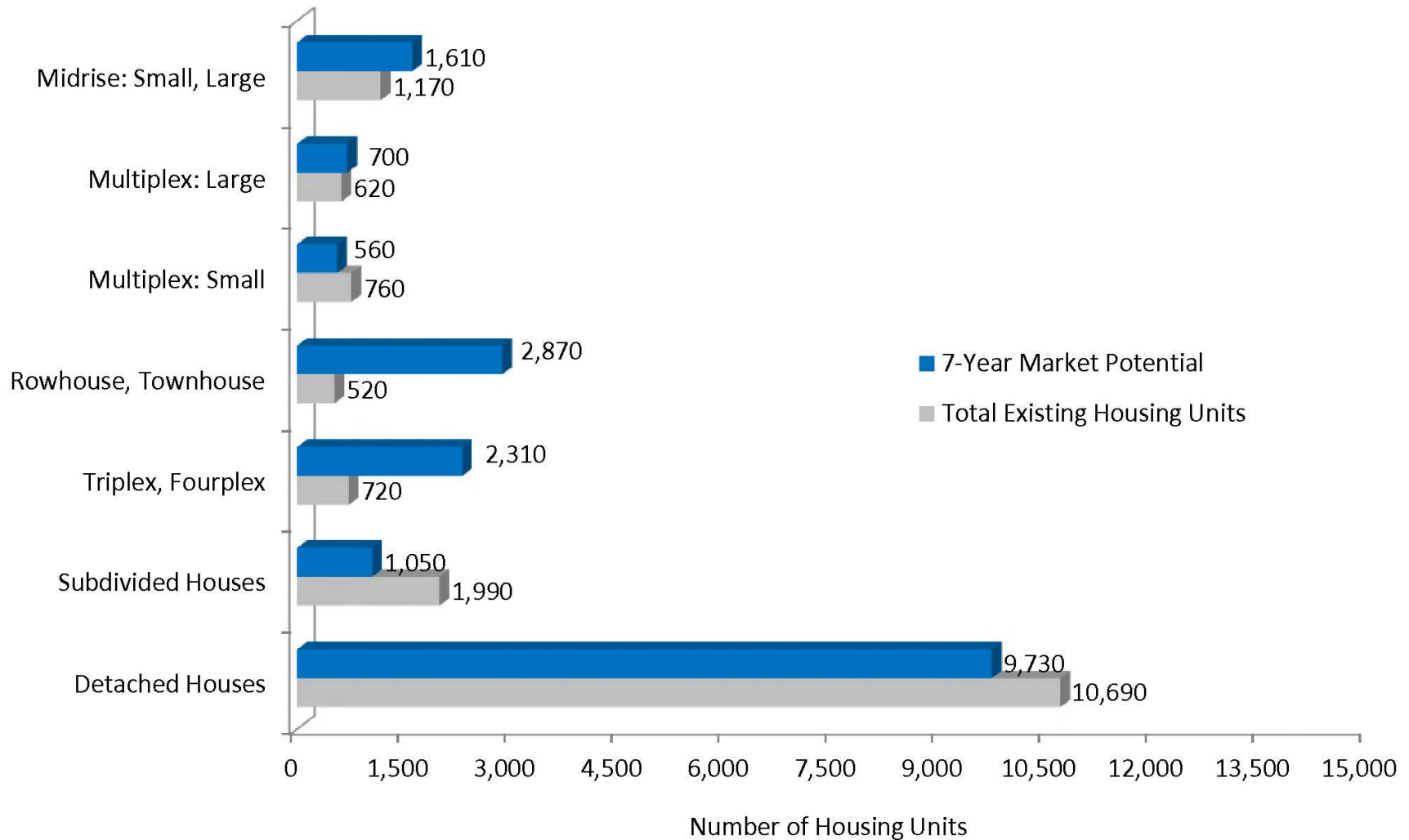




The City of Muskegon

7 Year Potential v. Existing Units

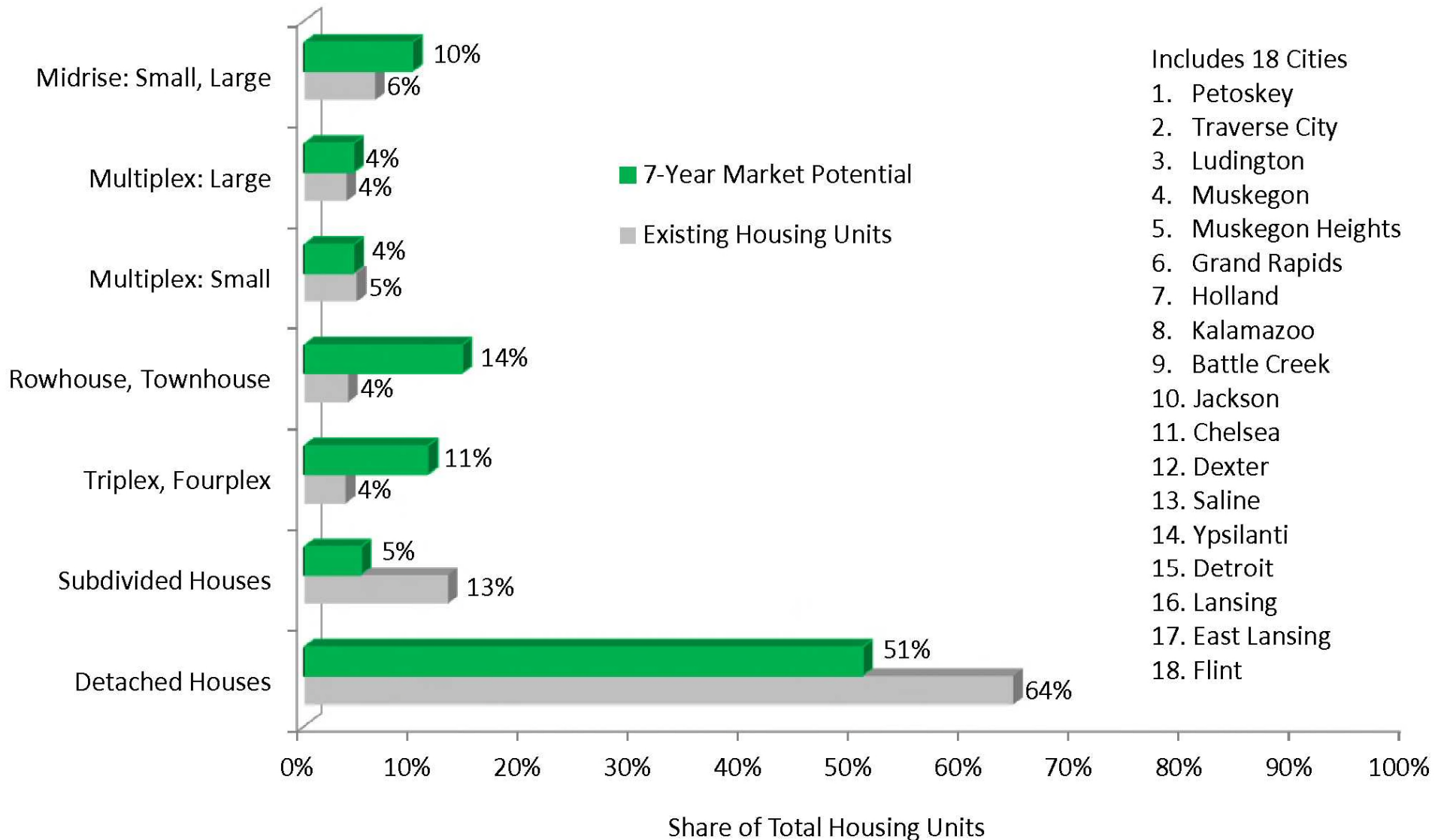
7-Year Market Potential v. Total Existing Housing Units
Houses v. Missing Middle Formats
All 71 Lifestyle Clusters - The City of Muskegon, Michigan





18 Cities – All 71 Lifestyle Clusters

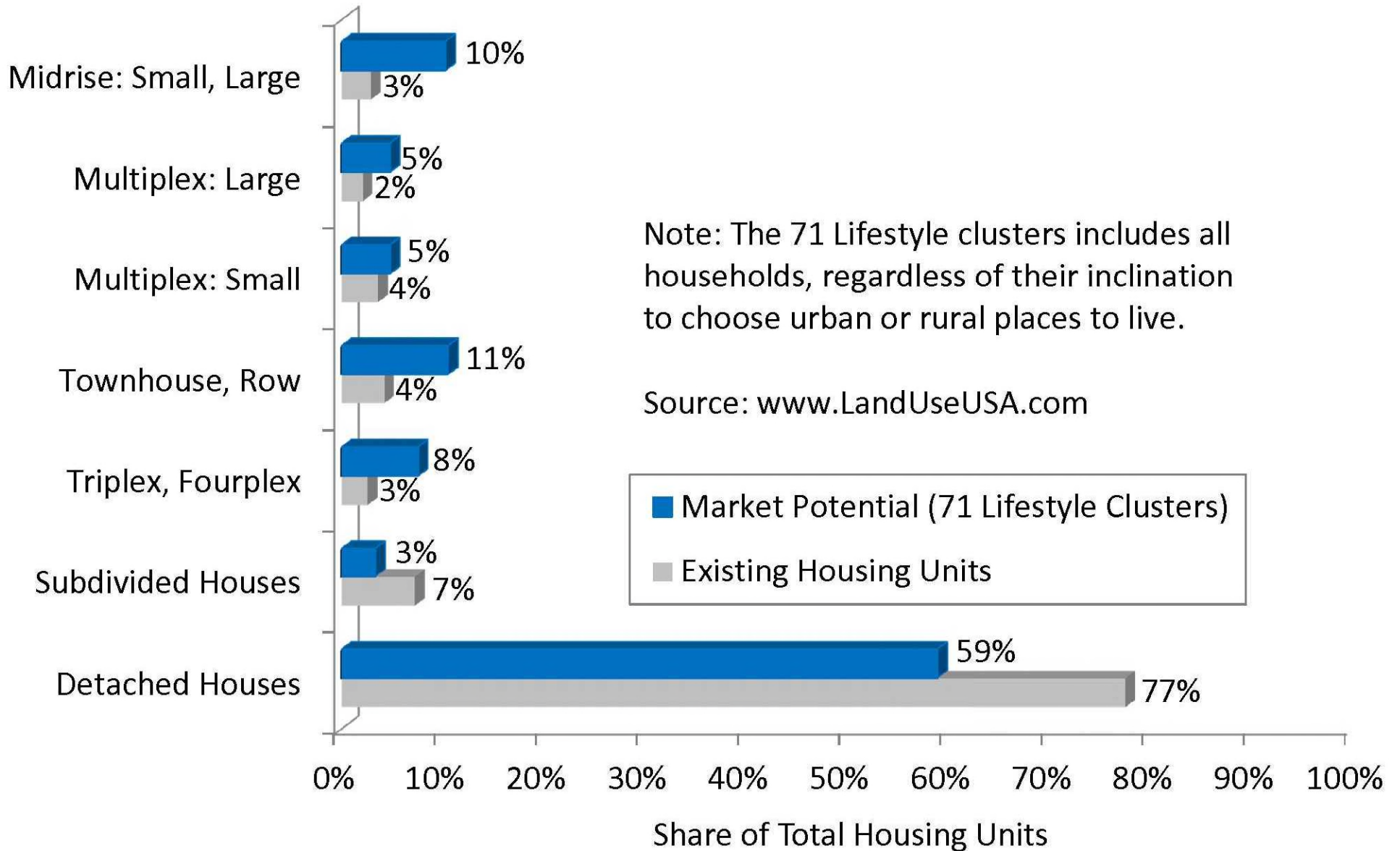
Market Potential v. Existing Units





60 Counties – All 71 Lifestyle Clusters

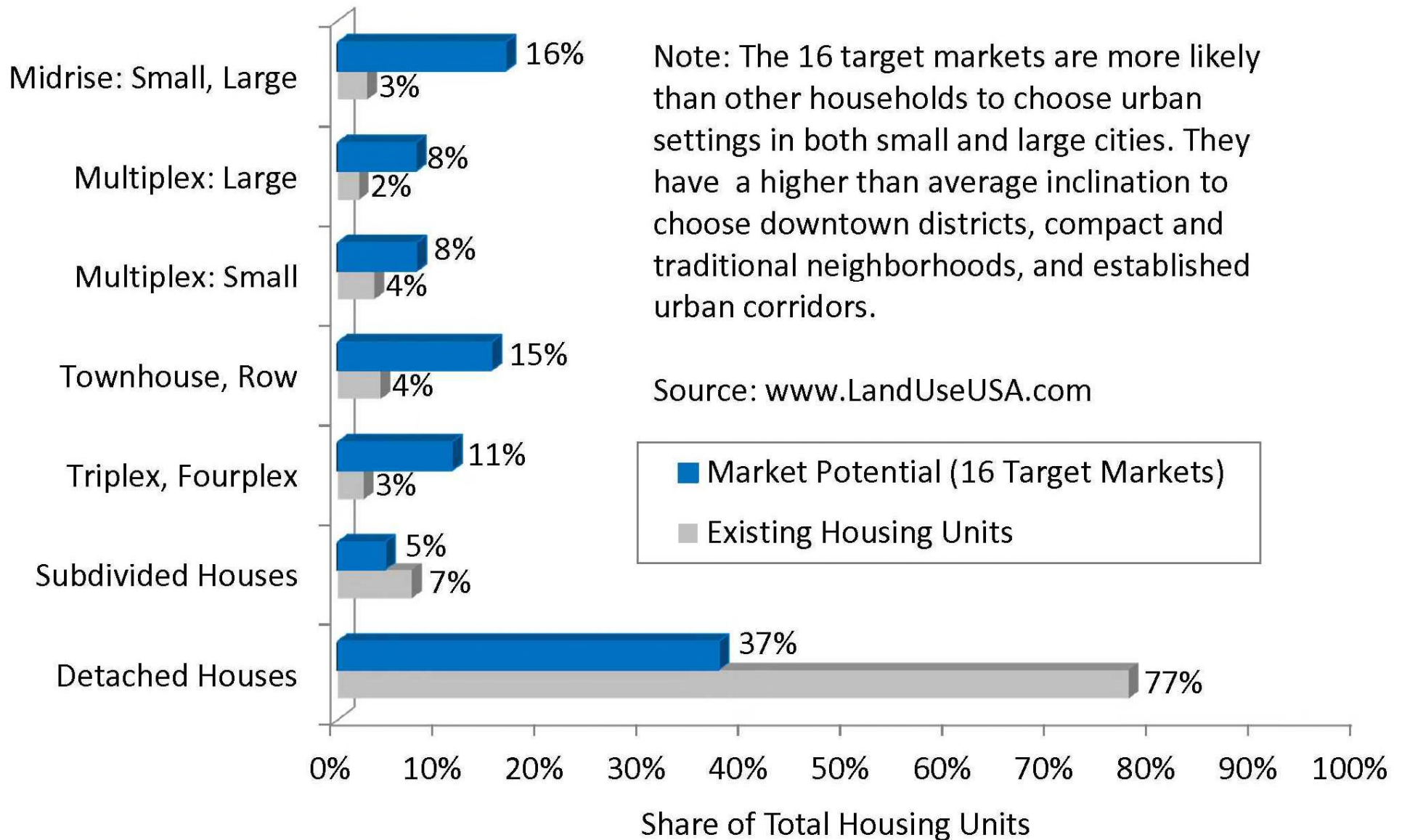
Market Potential v. Existing





60 Counties – 16 Target Markets

Market Potential v. Existing Units





Developer Strategies

- Downtowns, Urban Infill, Main Corridors
- Attached Units, Vertical Scale
- Mixed-use, Adaptive Reuse
- Compact, Innovative, High-Tech Design
- Unique Building Amenities
- Unique Unit Amenities
- Near Public Transportation
- Bikeable, Walkable Places
- Convenience is Key
- Placemaking Amenities



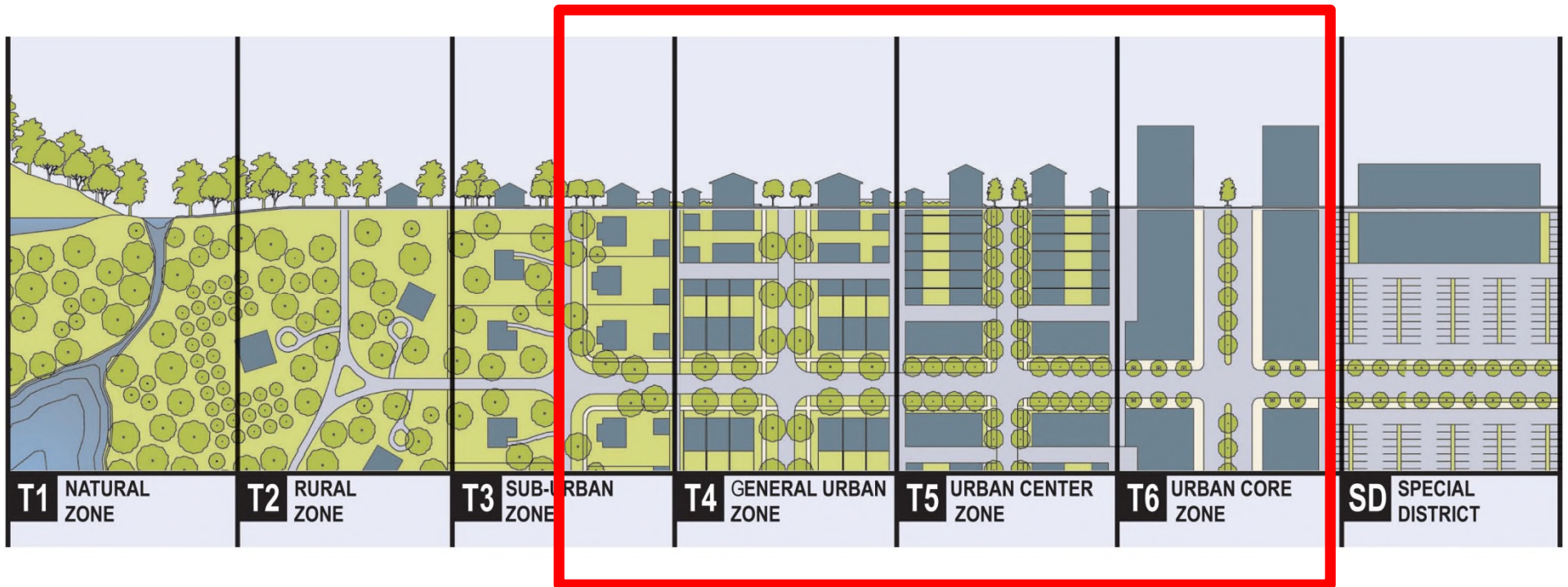


Target Market Analysis – Urban Focus

DOWNTOWNS, URBAN DISTRICTS, CORRIDORS

Downtown + Street Grid + Compact + Sense of Place

Follows the place types of the Urban Transect





Transect Zone | T3





Transect Zone | T3





Transect Zone | T4





Transect Zone | T5M





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Main Street Mix





Multiplex, Live/Work





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Multiplex, Midplex





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Urban Stacked Flats





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Midrise





LANDU

Midrise





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Urban Stacked Flats





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Courtyard Apartments





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Townhouse, Live/Work





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Townhouse, Row House





Duplexes, Triplexes, Fourplexes





Carriage, Accessory Dwelling Units





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Bungalow Courts





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Bungalow Courts





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Bungalow Courts





Thinking Outside the Box





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Thinking Outside the Box





East Central Michigan - TMA Team



Sharon Woods, CRE | Principal
LandUse|USA



Ryan E. Griffith | Principal
Growing Home Design



James Espinoza | CATEam
Community Development Specialist



3 Most Important Questions Phone Interviews – Ryan Griffith



Ryan E. Griffith | Principal
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growinghomedesign@gmail.com
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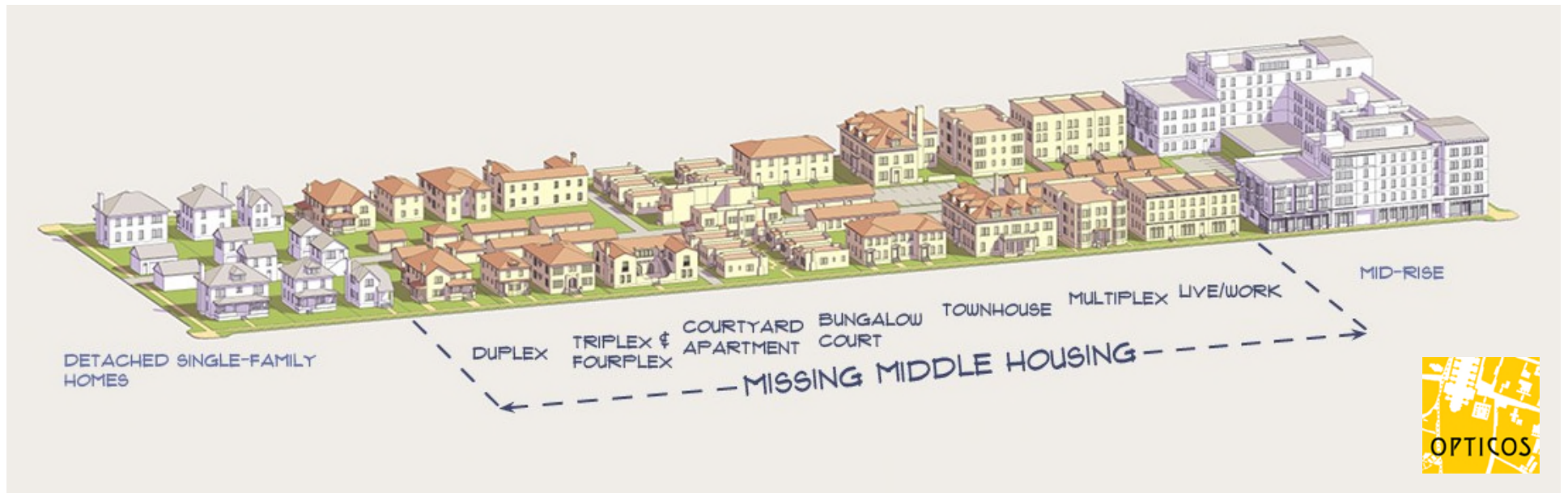
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(And unit sizes in square feet, \$ contract rents, \$ home values)



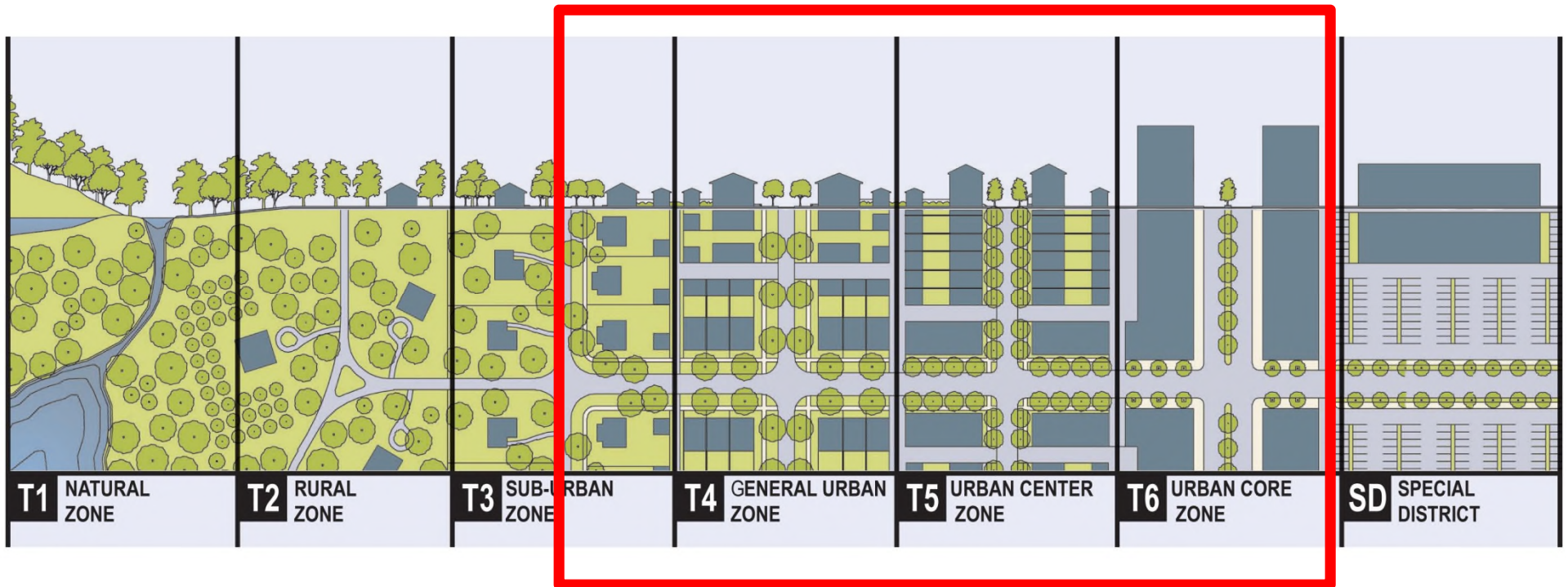


Rural-to-Urban Transect

DOWNTOWNS, URBAN DISTRICTS, CORRIDORS

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Development Task-line

Municipal-Led Placemaking Project

Task Line

