



**TMA Summary Exhibits**  
**Arenac County**  
**Michigan**  
**2016**

**Prepared by:**



**LandUseUSA**

**Prepared for:**

**East Central Michigan Prosperity Region 5**

**Michigan State Housing Development Authority**



**MSHDA**  
 MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY

## Study Overview

This Residential Target Market Analysis (TMA) and study for Arenac County reflects a collaborative effort of a diverse team of stakeholders. It has been funded through a matching grant provided by the Michigan State Housing Development Authority (MSHDA); and has also benefited from administrative support from the East Michigan Council of Governments (EMCOG). Through this initiative, LandUseUSA (a MSHDA-approved TMA consultant) has been engaged to conduct the study, which was completed in late 2016.

The study spans the East Central Michigan Prosperity Region 5, which includes Arenac, Bay, Clare, Gladwin, Gratiot, Isabella, Midland, and Saginaw Counties. Results for each county are detailed in individual reports that can be found online at [www.emcog.org](http://www.emcog.org), along with an accompanying Regional Workbook. Contact information for the EMCOG and LandUseUSA is provided on the last page of this summary; and stakeholders are encouraged to email or call with any questions.

Results of the TMA have been used to identify Missing Middle Housing formats for developers and to encourage the development of unique products within that building typology. A description of the typology can be found in the Regional Workbook, and additional resources are also available online at [www.MissingMiddleHousing.com](http://www.MissingMiddleHousing.com).

The market potential from the TMA has been carefully aligned with housing formats to reflect the preferences of migrating target markets (lifestyle clusters) and their propensity to choose attached units in a variety of building sizes. The TMA also focuses on migrating target markets that have a high propensity to choose urban places to live, including downtowns and compact neighborhoods. Recommendations also reflect results of a real estate analysis and observations of existing choices throughout the county.

## Arenac County Results

This short document summarizes the results for Arenac County and includes a selection of tables and exhibits from the complete report. Summary Table A on the following page summarizes the results for the county, plus the cities of Standish and Au Gres. By matching unique housing formats with the preferences of migrating target markets, these places can benefit through population retention and growth.

Summary Table A

Annual Market Potential – Attached and Detached Units  
 Renters and Owners – Aggressive (Maximum) Scenario  
 Arenac County – East Central Michigan Prosperity Region 5 – 2016

Annual Market Potential Aggressive Scenario	Detached Houses	<u>Attached</u>		Total Potential
		Duplex Triplex	Larger Formats	
The City of Standish	71	5	36	112
The City of Au Gres	20	.	5	25
Subtotal 2 Listed Places	91	5	41	137
<u>Surrounding Townships</u>	<u>147</u>	<u>11</u>	<u>41</u>	<u>199</u>
Arenac County Total	238	16	82	336
Format as a Share of Total				
Two Urban Places	66%	4%	30%	100%
Arenac County	71%	5%	24%	100%

**“Slide” by Building Format**

Summary Table B on the next page demonstrates the TMA results for Arenac County and the City of Standish by building size, before and after some adjustments. The adjustments apply a “slide” to align the market potential with the most appropriate building sizes.

For example, there is a county-wide annual market potential for 24 units in a building with 50 or more units. Assuming that one large building can capture a 50% market share of the market potential (which is exceptionally high), then it would theoretically take at more than four years to fill the building. Instead of waiting four years, the market potential can be fitted to several buildings that are smaller and more appropriately sized.

Similarly, the adjusted results for the City of Standish include 3 units that have been fitted to a triplex, 4 units in a fourplex, 12 units in buildings with 5 to 9 units each, and 17 units in multiplexes. The total annual market potential for attached units in the city is 36 units (plus 71 detached houses). These adjustments are also shown in the following table.

Summary Table B

Annual Market Potential – “Slide” along Formats (in Units)  
 71 Lifestyle Clusters - Aggressive Scenario  
 Arenac County and the City of Standish, Michigan – 2016

Number of Units by Building Format/Size	Arenac County		The City of Standish	
	Unadjusted w/out Slide	Adjusted with Slide	Unadjusted w/out Slide	Adjusted with Slide
1   Detached Houses	238	238	71	71
2   Side-by-Side & Stacked	6	6	1	.
3   Side-by-Side & Stacked	10	9	4	3
4   Side-by-Side & Stacked	6	4	2	4
5-9   Townhouse, Live-Work	32	35	12	12
10+   Multiplex: Small	9	10	3	17
20+   Multiplex: Large	11	34	5	.
50+   Midrise: Small	10	.	3	.
100+   Midrise: Large	14	.	6	.
Subtotal Attached	98	98	36	36

The following page displays Summary Table C, which repeats the results for Arenac County and the City of Standish, plus results for the City of Au Gres. As shown, the annual market potential for the City of Au Gres includes 5 units, and they have all been reallocated to one relatively small and appropriately-sized building. Ideally, any new-builds will be developed with Missing Middle Housing formats, such as townhouses, row houses, or lofts/flats.

Summary Table C

Annual Market Potential – “Slide” along Formats (in Units)  
 71 Lifestyle Clusters – Aggressive Scenario  
 Places in Arenac County – ECM Prosperity Region 5 – 2016

Number of Units Unadjusted Model Results	Arenac County	The City of Standish	The City of Au Gres
1   Detached Houses	238	71	20
2   Side-by-Side & Stacked	6	1	.
3   Side-by-Side & Stacked	10	4	.
4   Side-by-Side & Stacked	6	2	.
5-9   Townhouse, Live-Work	32	12	1
10+   Multiplex: Small	9	3	1
20+   Multiplex: Large	11	5	1
50+   Midrise: Small	10	3	.
100+   Midrise: Large	14	6	2
Subtotal Attached	98	36	5
Number of Units Adjusted for “Slide”	Arenac County	The City of Standish	The City of Au Gres
1   Detached Houses	238	71	20
2   Side-by-Side & Stacked	6	.	.
3   Side-by-Side & Stacked	9	3	.
4   Side-by-Side & Stacked	4	4	.
5-9   Townhouse, Live-Work	35	12	5
10+   Multiplex: Small	10	17	.
20+   Multiplex: Large	34	.	.
50+   Midrise: Small	.	.	.
100+   Midrise: Large	.	.	.
Subtotal Attached	98	36	5

## Attachments

All of the exhibits attached to this summary are excerpts from the complete TMA report and document, and they include the following:

- a) Histograms comparing the market potential to current supply by building size.
- b) Tables showing the market potential among all 71 lifestyle clusters, and among two subsets that represent moderate and upscale target markets.
- c) Histograms demonstrating the most prevalent households living in each respective county and place, by lifestyle cluster.

The complete report and Regional Workbook both include additional information on the upscale and moderate target markets. Interested stakeholders are encouraged to review both documents to become familiar with the terminology and the preferences of these migrating households.

## Contact Information

Electronic copies of all eight county Target Market Analysis county-wide studies and the accompanying Regional Workbook are available for download at [www.emcog.org](http://www.emcog.org), or by contacting Jane Fitzpatrick at the email or phone number shown below.

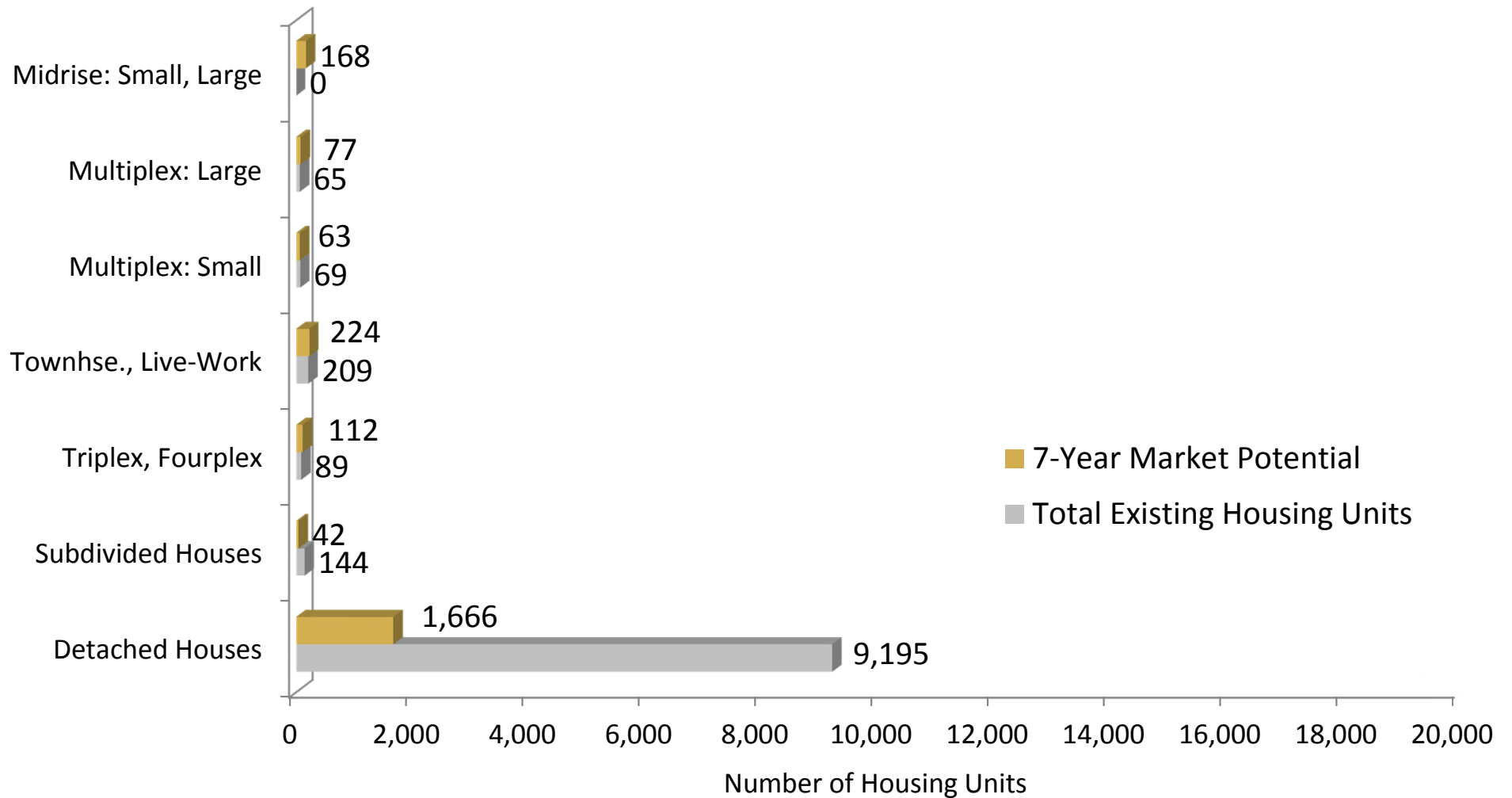
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Questions regarding the work approach, methodology, TMA terminology, analytic results, strategy recommendations, and planning implications should be directed to Sharon Woods at LandUseUSA.

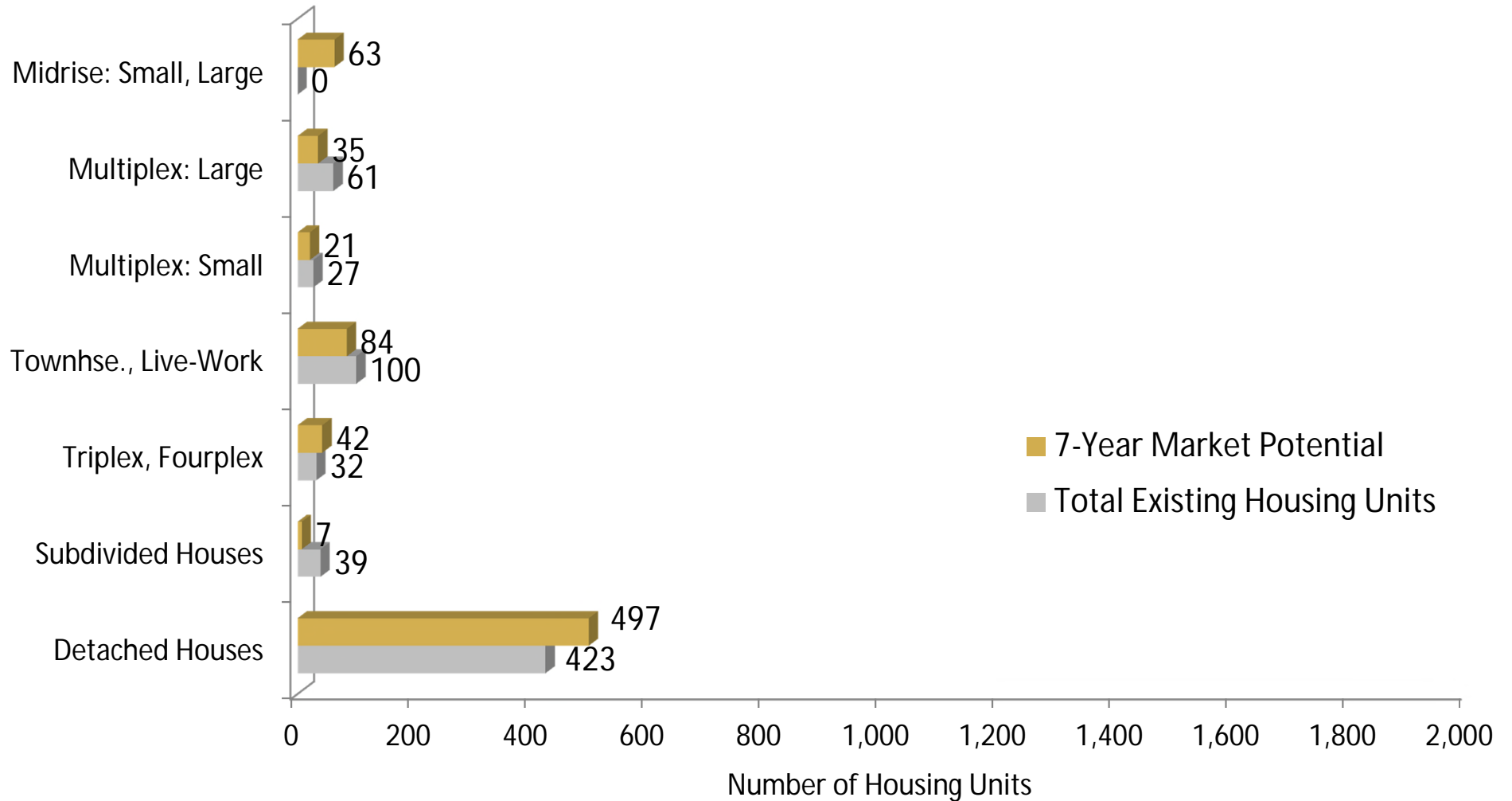
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7-Year Market Potential v. Total Existing Housing Units  
 All 71 Lifestyle Clusters - Aggressive Scenario  
 Arenac County | ECM Prosperity Region 5 | 2016 - 2022



Source: Based on analysis and target market analysis modelling conducted exclusively by LandUse|USA; 2016 (c) with all rights reserved. Unadjusted for seasonal, non-resident households.

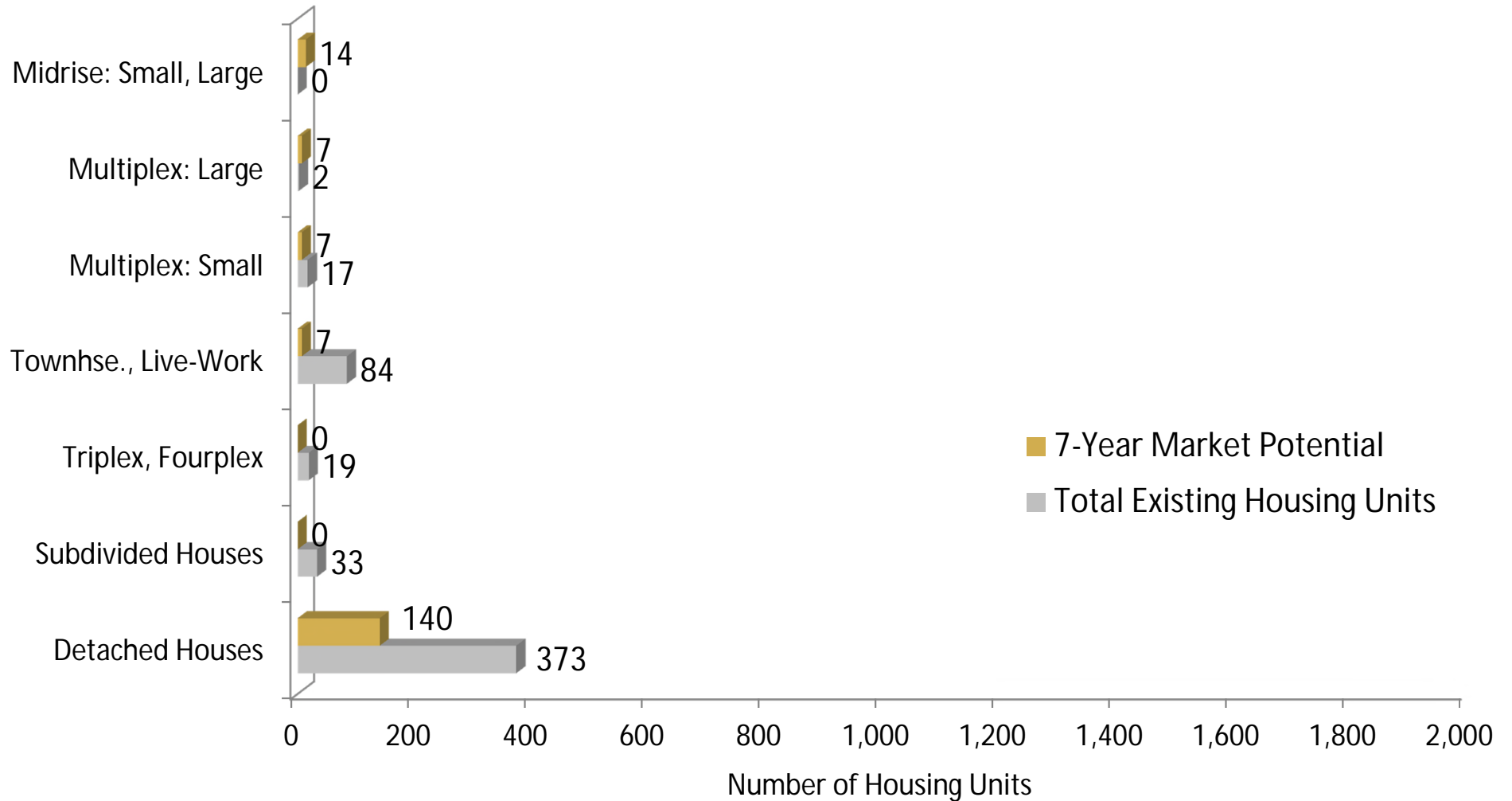
7-Year Market Potential v. Total Existing Housing Units  
 All 71 Lifestyle Clusters - Aggressive Scenario  
 The City of Standish | Arenac County | 2016 - 2022



Source: Based on analysis and target market analysis modelling conducted exclusively by LandUse|USA; 2016 (c) with all rights reserved. Unadjusted for seasonal, non-resident households.



7-Year Market Potential v. Total Existing Housing Units  
 All 71 Lifestyle Clusters - Aggressive Scenario  
 The City of Au Gres | Arenac County | 2016 - 2022



Source: Based on analysis and target market analysis modelling conducted exclusively by LandUse|USA; 2016 (c) with all rights reserved. Unadjusted for seasonal, non-resident households.

Annual Market Potential for Selected Target Markets - AGGRESSIVE SCENARIO

Number of Units (New and/or Rehab) by Tenure and Building Form

Places in Arenac COUNTY | East Central Michigan Prosperity Region 5 | Years 2016 - 2020

AGGRESSIVE SCENARIO	City of Au Gres 71 Lifestyle Clusters			City of Omer 71 Lifestyle Clusters			Village of Sterling 71 Lifestyle Clusters		
	Total	Owners	Renters	Total	Owners	Renters	Total	Owners	Renters
Total Housing Units	25	13	12	3	3	0	4	4	0
1   Detached Houses	20	13	7	3	3	0	4	4	0
2   Side-by-Side & Stacked	0	0	0	0	0	0	0	0	0
3   Side-by-Side & Stacked	0	0	0	0	0	0	0	0	0
4   Side-by-Side & Stacked	0	0	0	0	0	0	0	0	0
5-9   Townhse., Live-Work	1	0	1	0	0	0	0	0	0
10-19   Multiplex: Small	1	0	1	0	0	0	0	0	0
20-49   Multiplex: Large	1	0	1	0	0	0	0	0	0
50-99   Midrise: Small	0	0	0	0	0	0	0	0	0
100+   Midrise: Large	2	0	2	0	0	0	0	0	0
<b>Total Units</b>	<b>25</b>	<b>13</b>	<b>12</b>	<b>3</b>	<b>3</b>	<b>0</b>	<b>4</b>	<b>4</b>	<b>0</b>
Detached Houses	20	13	7	3	3	0	4	4	0
Duplexes & Triplexes	0	0	0	0	0	0	0	0	0
Other Attached Formats	5	0	5	0	0	0	0	0	0

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.

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

Places in Arenac COUNTY | East Central Michigan Prosperity Region 5 | Years 2016 - 2020

AGGRESSIVE SCENARIO	City of Standish 71 Lifestyle Clusters			City of Standish Upscale Target Markets			City of Standish Moderate Target Markets		
	Total	Owners	Renters	Total	Owners	Renters	Total	Owners	Renters
Total Housing Units	107	45	62	3	2	1	35	0	35
1   Detached Houses	71	45	26	3	2	1	4	0	4
2   Side-by-Side & Stacked	1	0	1	0	0	0	1	0	1
3   Side-by-Side & Stacked	4	0	4	0	0	0	3	0	3
4   Side-by-Side & Stacked	2	0	2	0	0	0	2	0	2
5-9   Townhse., Live-Work	12	0	12	0	0	0	8	0	8
10-19   Multiplex: Small	3	0	3	0	0	0	3	0	3
20-49   Multiplex: Large	5	0	5	0	0	0	5	0	5
50-99   Midrise: Small	3	0	3	0	0	0	3	0	3
100+   Midrise: Large	6	0	6	0	0	0	6	0	6
Total Units	107	45	62	3	2	1	35	0	35
Detached Houses	71	45	26	3	2	1	4	0	4
Duplexes & Triplexes	5	0	5	0	0	0	4	0	4
Other Attached Formats	31	0	31	0	0	0	27	0	27

Source: Target Market Analysis and exhibit prepared exclusively by LandUses|USA © 2016, all rights reserved.

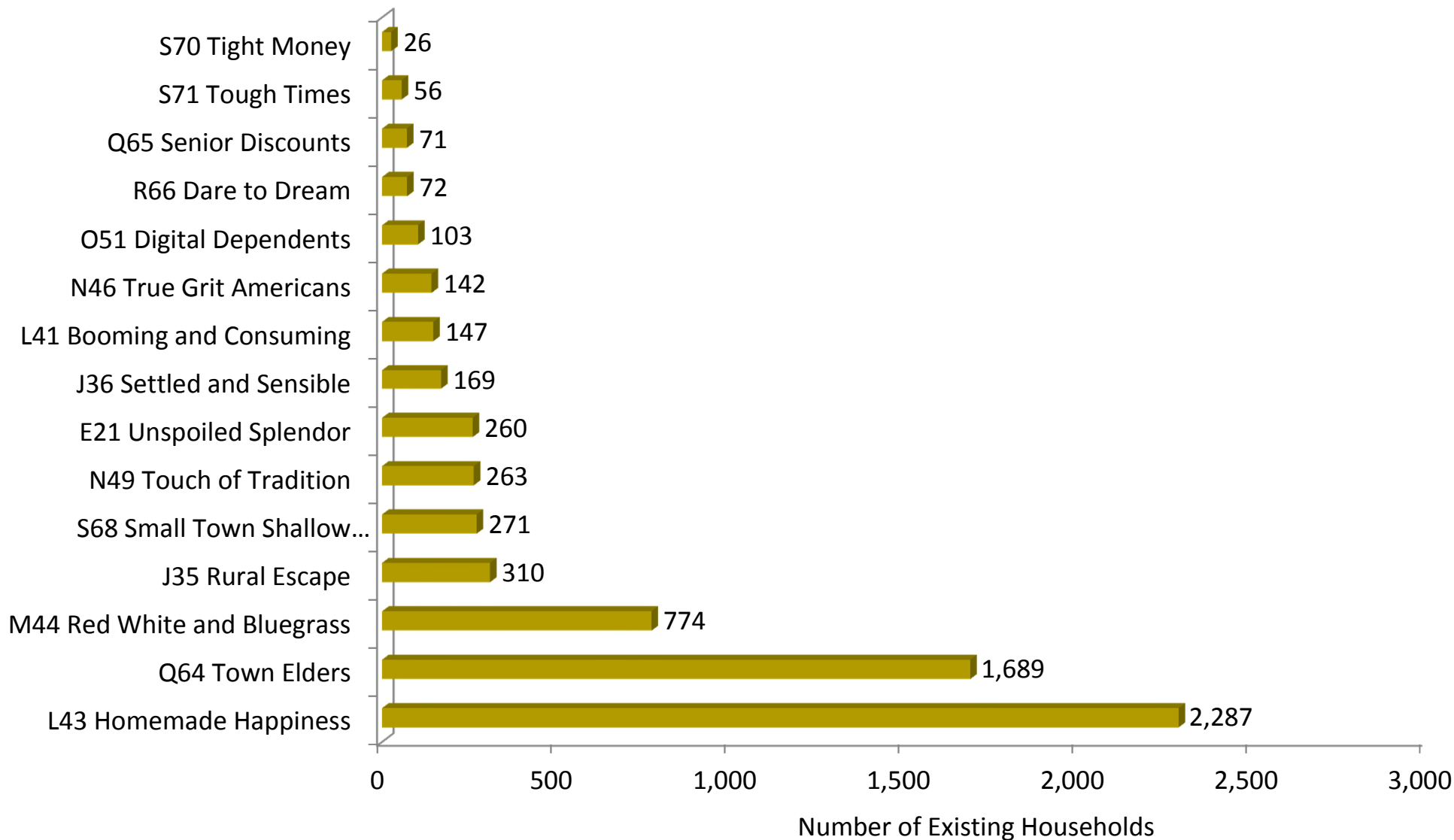
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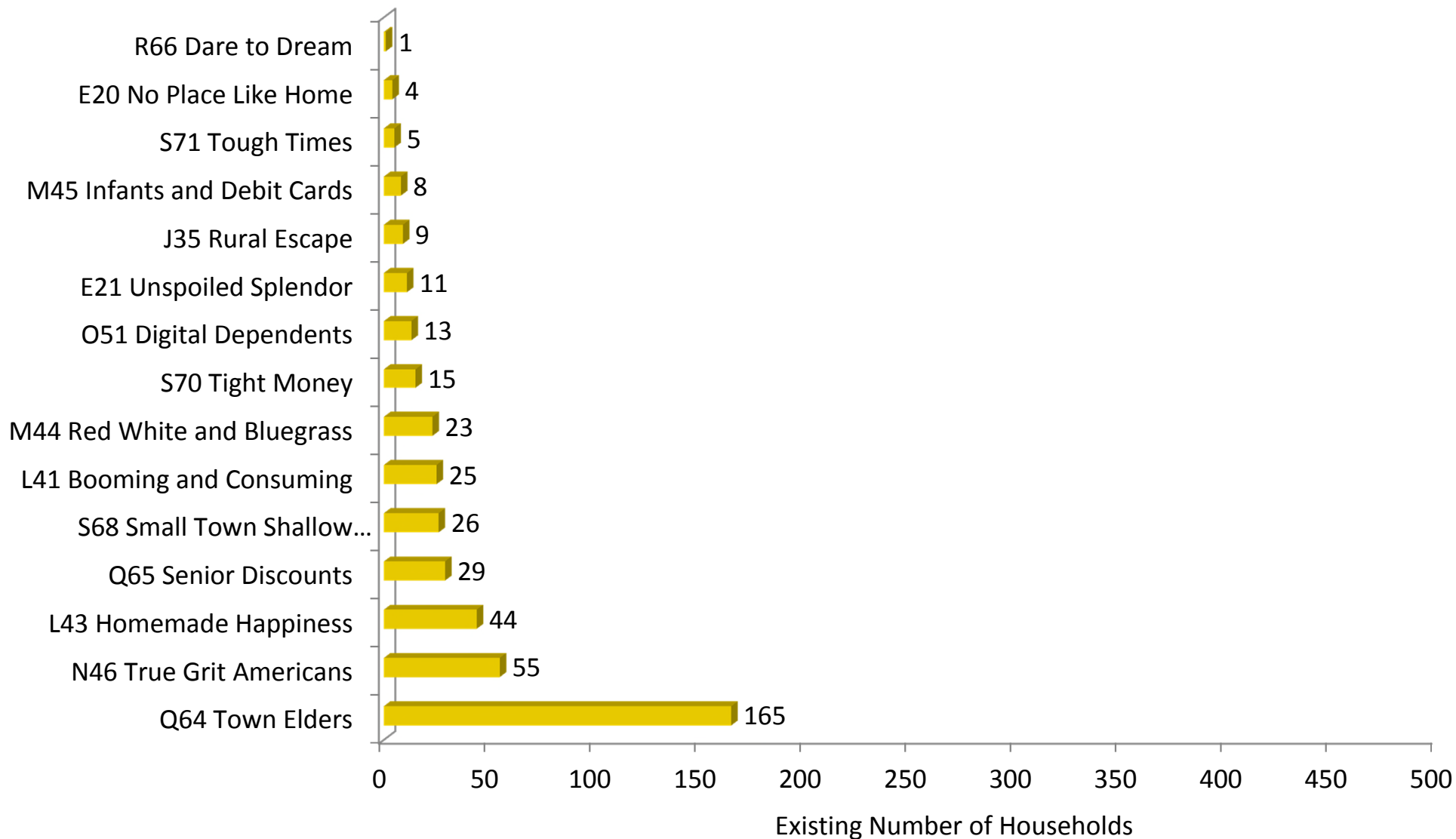
Townhouses may include row houses and brownstones; and multiplexes may include bungalow courts and courtyard "apartments".

Existing Households by Predominant Lifestyle Cluster  
 Arenac COUNTY | ECM Prosperity Region 5 | Year 2015



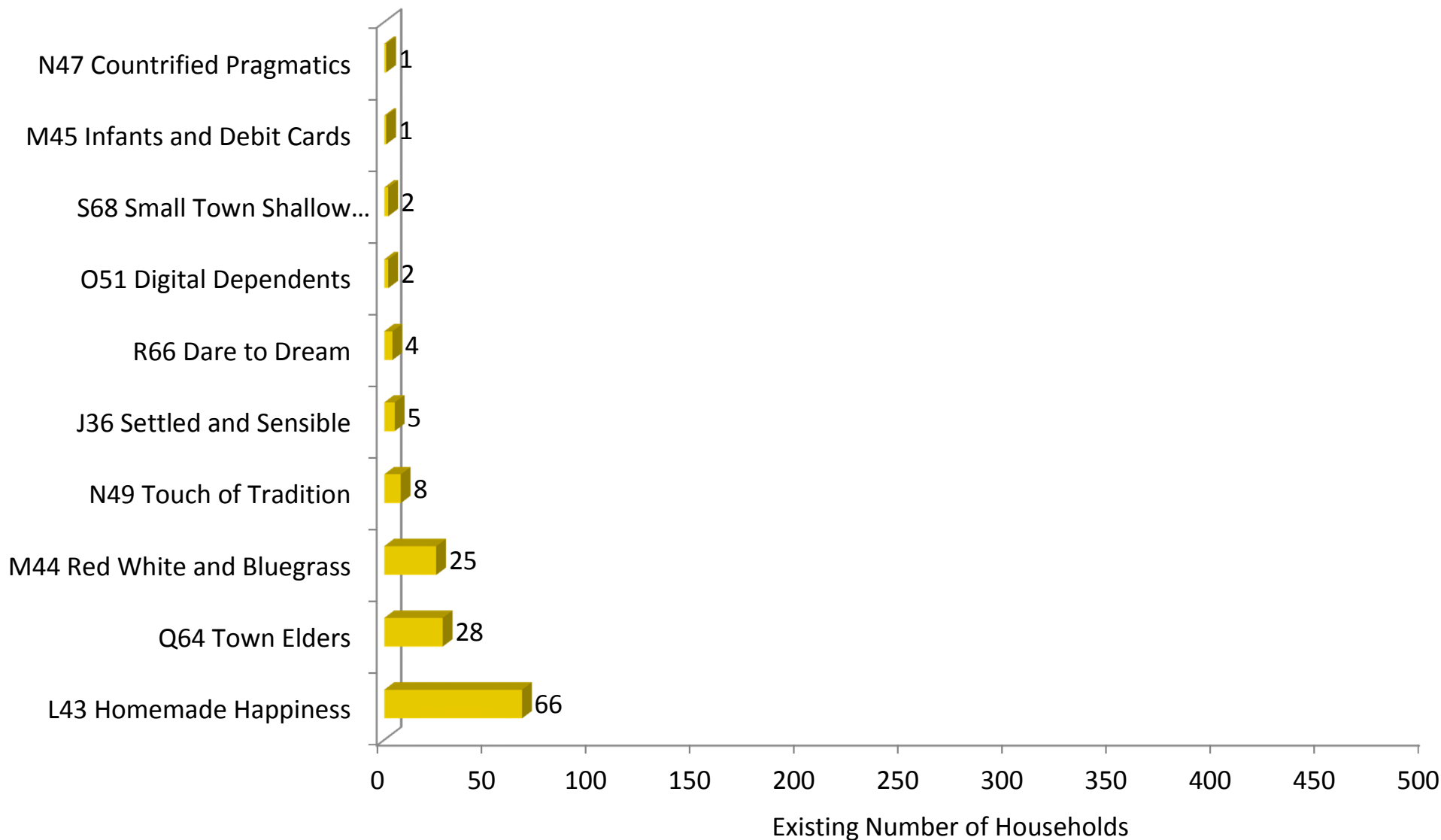
Source: Underlying Mosaic|USA data provided by Experian Decision Analytics and powered by Sites|USA, with results through year-end 2015. Analysis and exhibit prepared by LandUse|USA; 2016.

Existing Households by Predominant Lifestyle Cluster  
 The City of Au Gres | Arenac County, Michigan | Year 2015



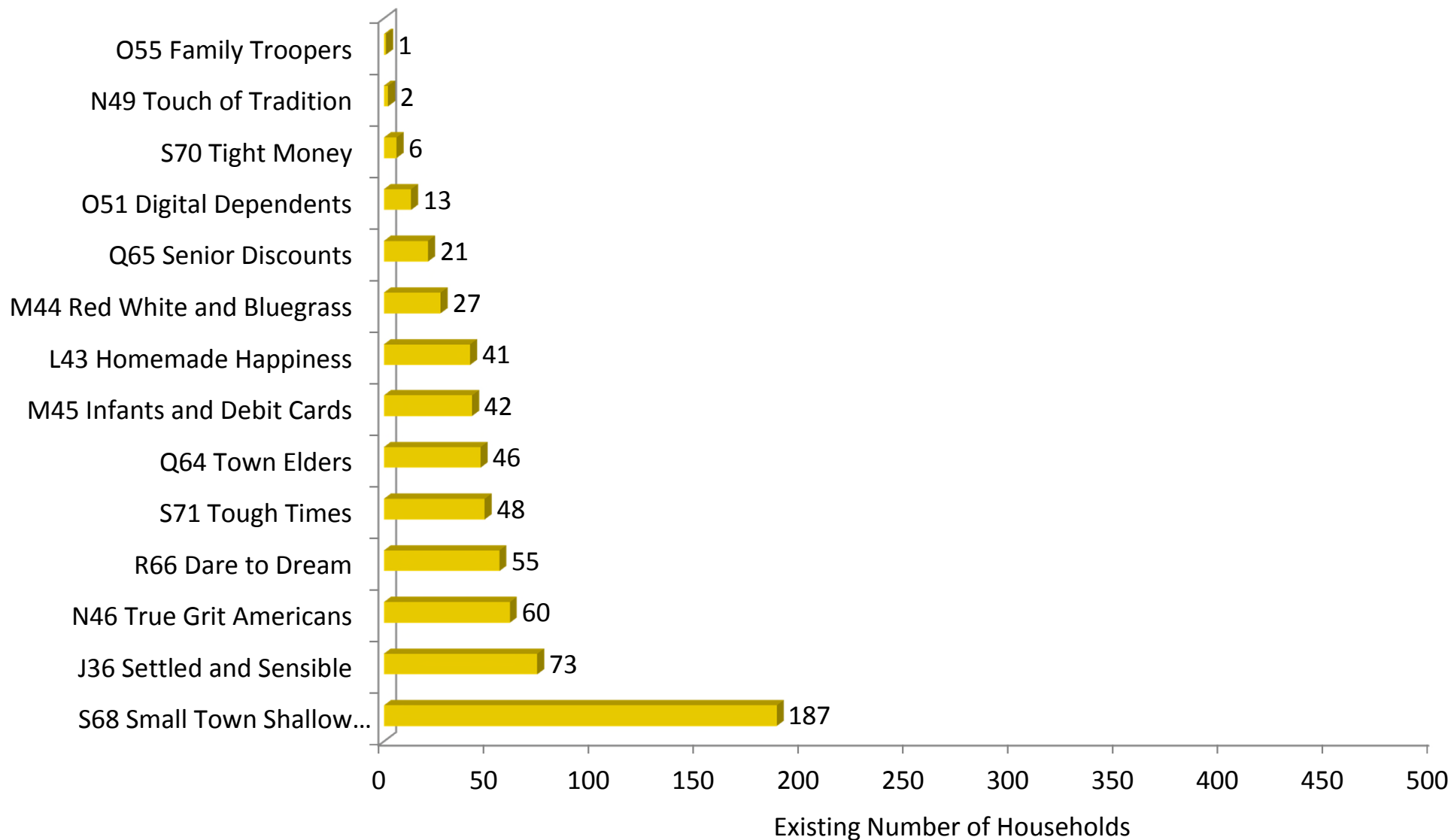
Source: Underlying Mosaic|USA data provided by Experian Decision Analytics and powered by Sites|USA, with results through year-end 2015. Analysis and exhibit prepared by LandUse|USA; 2016.

Existing Households by Predominant Lifestyle Cluster  
 The City of Omer | Arenac County, Michigan | Year 2015



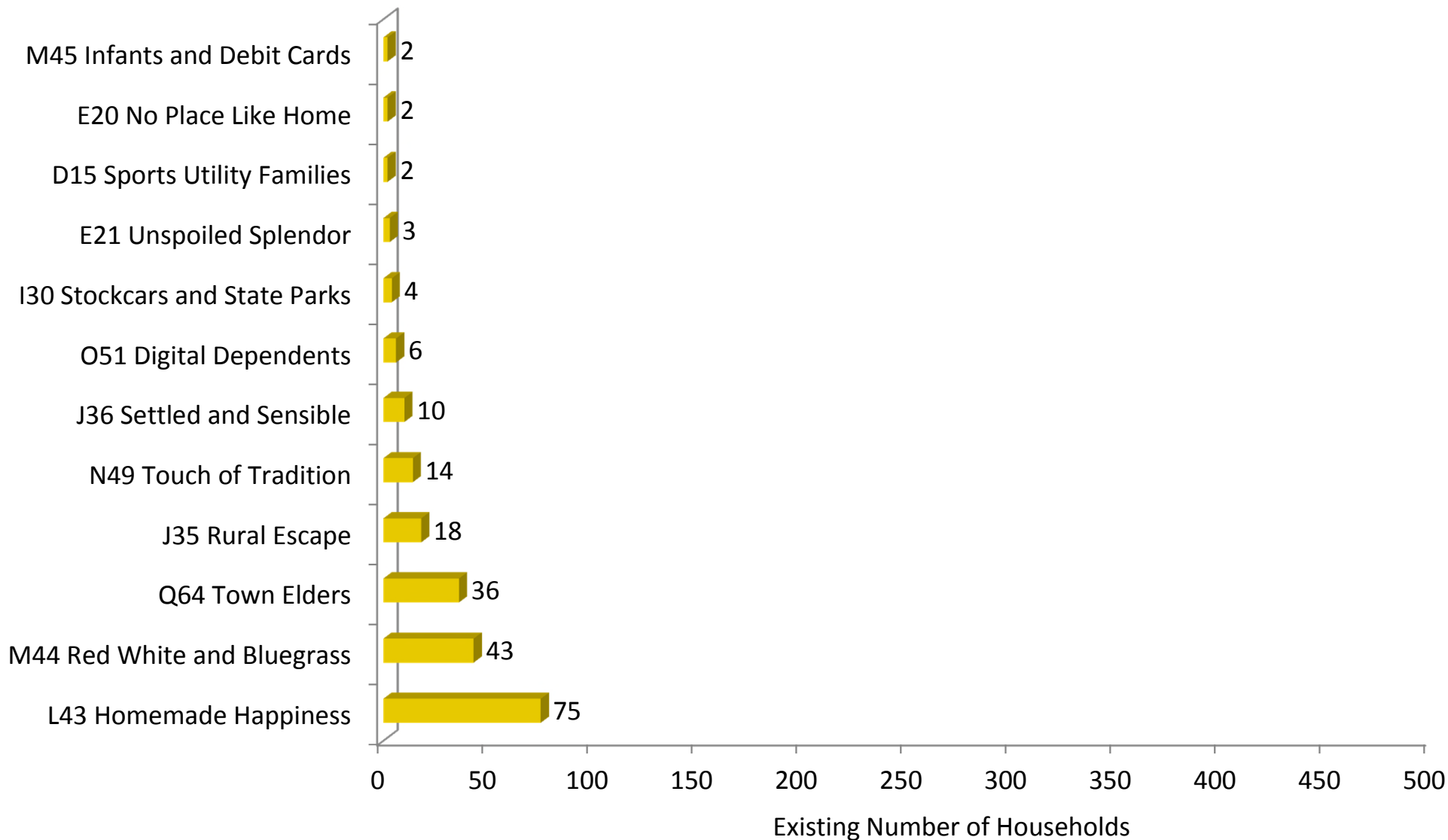
Source: Underlying Mosaic|USA data provided by Experian Decision Analytics and powered by Sites|USA, with results through year-end 2015. Analysis and exhibit prepared by LandUse|USA; 2016.

Existing Households by Predominant Lifestyle Cluster  
 The City of Standish | Arenac County, Michigan | Year 2015



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 Village of Sterling | Arenac County, Michigan | Year 2015



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.