



**TMA Summary Exhibits**

**Midland 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 Midland 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.

## Midland County Results

This short document summarizes the results for Midland 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 Midland and Coleman, and the Village of Shepherd. By matching unique housing formats with the preferences of migrating target markets, these places can benefit through population retention and growth (albeit modestly for the smallest places).

Summary Table A

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

Annual Market Potential Aggressive Scenario	Detached Houses	Attached		Total Potential
		Duplex Triplex	Larger Formats	
The City of Midland	1,486	304	2,357	4,147
Downtown Midland				
0.5 Mile Ring	90	17	105	212
1.0 Mile Ring	272	42	187	501
The City of Coleman	36	5	30	71
The Village of Sanford	19	1	5	25
Subtotal 2 Listed Places	55	6	35	96
Townships & Other Places	608	67	494	1,169
Midland County Total	2,149	377	2,886	5,412
Format as a Share of Total				
The City of Midland	36%	7%	57%	100%
Midland County	40%	7%	53%	100%

**“Slide” by Building Format**

Summary Table B on the next page demonstrates the TMA results for downtown Midland, before and after some adjustments. The adjustments apply a “slide” to align the market potential with the most appropriate building sizes.

For example, within 0.5 miles of downtown Midland, there is an annual market potential for 22 units in buildings with 100 or more units. Assuming that one large building can capture a 50% market share (which would be exceptionally high), it would take at least ten years to theoretically fill one 100-unit building. Instead of waiting five years to fill one large building, the market potential can be fitted to several buildings that are smaller and more appropriately sized. These adjustments are shown in the following table.

Summary Table B

Annual Market Potential – “Slide” along Formats (in Units)

71 Lifestyle Clusters – Aggressive Scenario

Downtown Rings – The City of Midland, Michigan – 2016

Number of Units by Building Format/Size	Downtown - 0.5 Mile		Downtown - 1.0 Mile	
	Unadjusted w/out Slide	Adjusted with Slide	Unadjusted w/out Slide	Adjusted with Slide
1   Detached Houses	90	90	272	272
2   Side-by-Side & Stacked	6	6	16	16
3   Side-by-Side & Stacked	11	9	26	24
4   Side-by-Side & Stacked	7	4	15	12
5-9   Townhouse, Live-Work	32	37	78	83
10+   Multiplex: Small	11	11	19	19
20+   Multiplex: Large	17	55	24	24
50+   Midrise: Small	16	.	21	51
100+   Midrise: Large	22	.	30	.
Subtotal Attached	122	122	229	229

The following page displays Summary Table C, which repeats the results for the City of Midland, plus the City of Coleman and the Village of Sanford. The annual market potential has been reallocated to building sizes that are appropriate for each of these unique places. For example, Coleman’s annual market potential for 16 units in relatively over-sized buildings (i.e., buildings with 20+ units each) has been more appropriately fitted to smaller buildings with 10+ units each. 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 Midland County – ECM Prosperity Region 5 – 2016

Number of Units Unadjusted Model Results	The City of Midland	The City of Coleman	The Village of Sanford
1   Detached Houses	1,486	36	19
2   Side-by-Side & Stacked	101	2	.
3   Side-by-Side & Stacked	203	3	1
4   Side-by-Side & Stacked	125	1	.
5-9   Townhouse, Live-Work	561	9	4
10+   Multiplex: Small	391	4	.
20+   Multiplex: Large	403	7	1
50+   Midrise: Small	274	4	.
100+   Midrise: Large	603	5	.
Subtotal Attached	2,661	35	6
Number of Units Adjusted for “Slide”	The City of Midland	The City of Coleman	The Village of Sanford
1   Detached Houses	1,486	36	19
2   Side-by-Side & Stacked	100	2	.
3   Side-by-Side & Stacked	201	3	.
4   Side-by-Side & Stacked	124	.	.
5-9   Townhouse, Live-Work	565	10	6
10+   Multiplex: Small	391	20	.
20+   Multiplex: Large	403	.	.
50+   Midrise: Small	274	.	.
100+   Midrise: Large	603	.	.
Subtotal Attached	2,661	35	6

## 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.

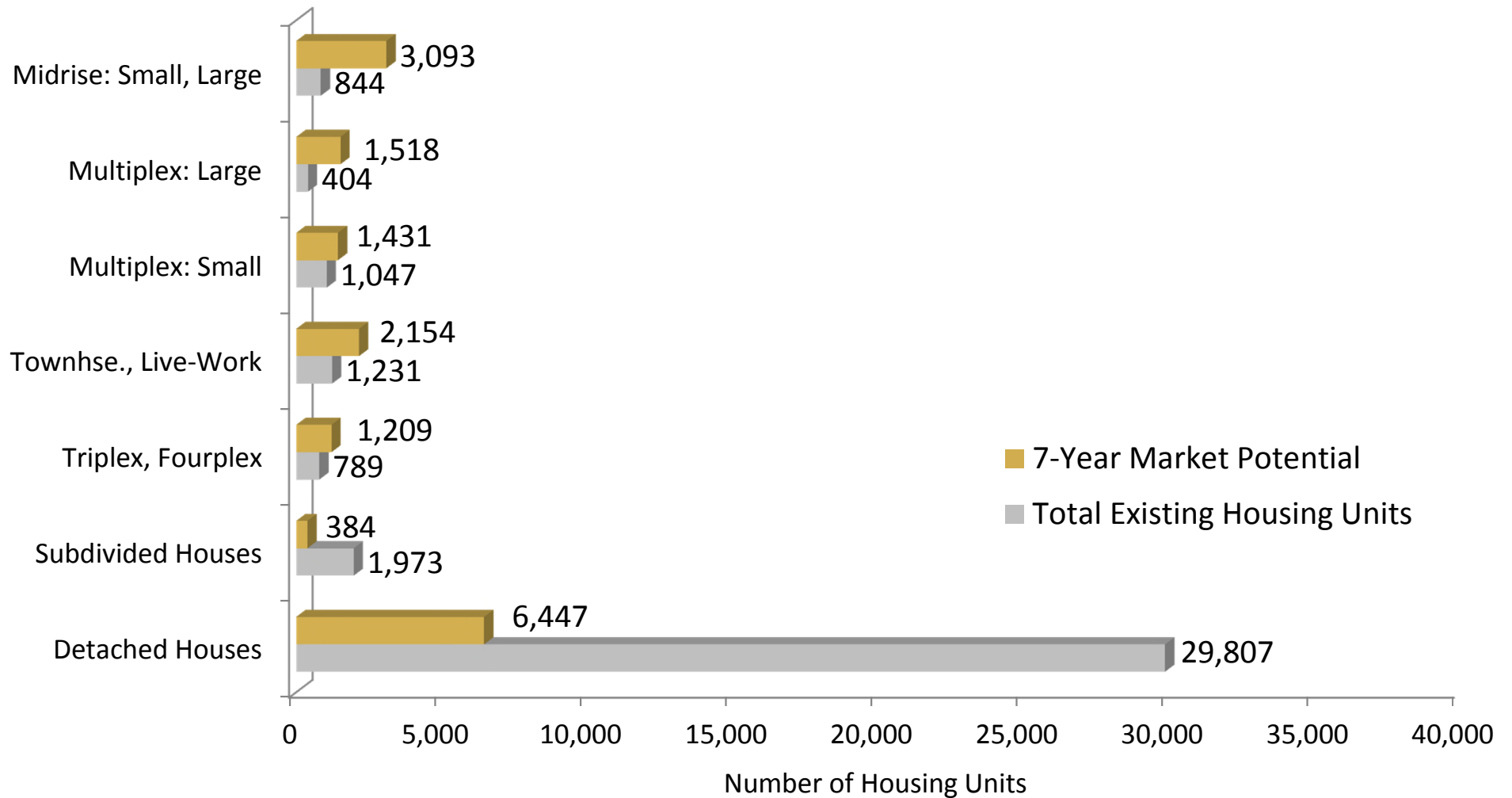
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Questions regarding the work approach, methodology, TMA terminology, analytic results, strategy recommendations, and planning implications should be directed to Sharon Woods at LandUseUSA.

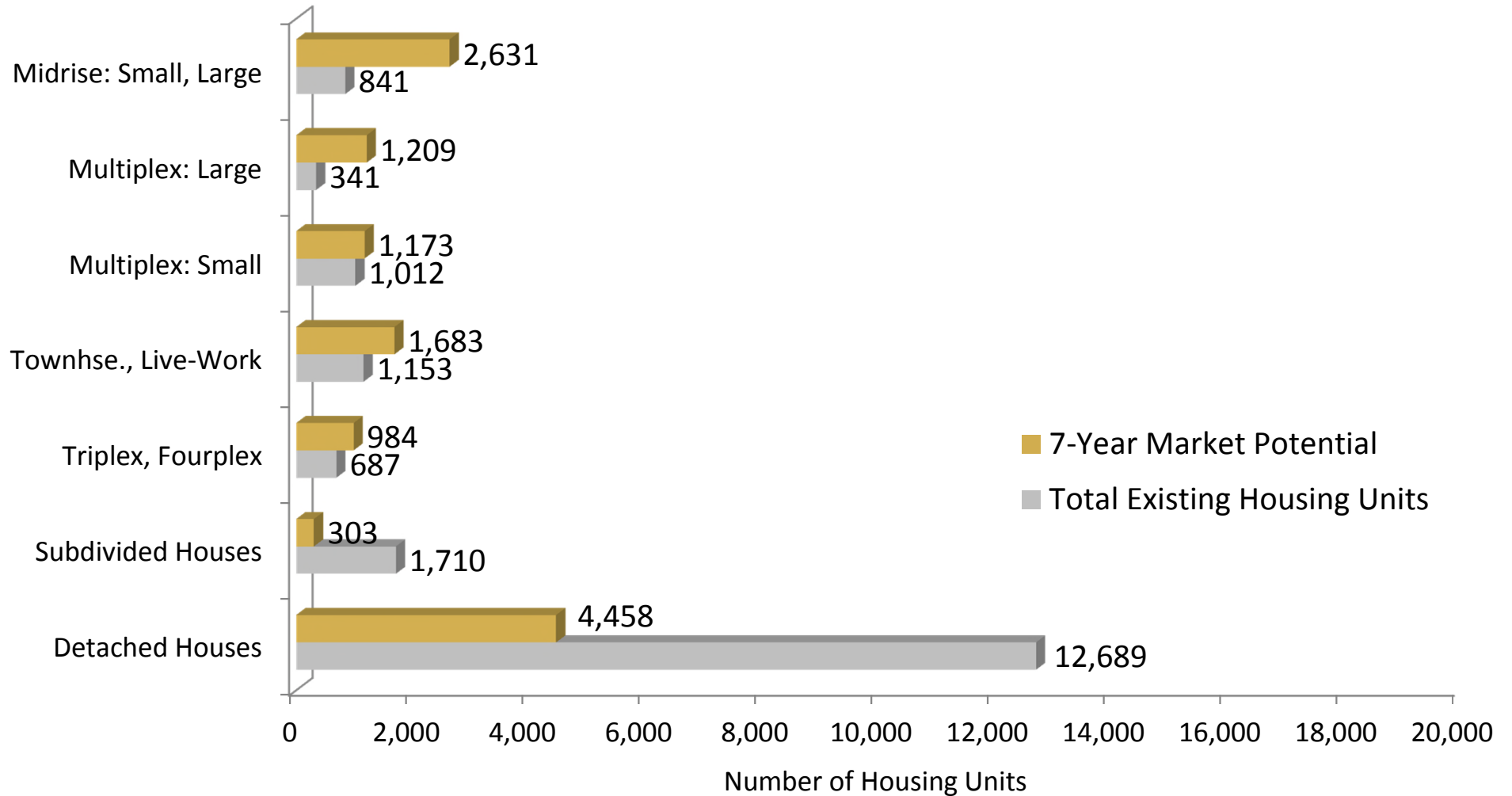
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3-Year Market Potential v. Total Existing Housing Units  
 All 71 Lifestyle Clusters - Aggressive Scenario  
 Midland County | ECM Prosperity Region 5 | 2016 - 2018



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.

3-Year Market Potential v. Total Existing Housing Units  
 All 71 Lifestyle Clusters - Aggressive Scenario  
 The City of Midland | Midland County | 2016 - 2018



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 Midland COUNTY | East Central Michigan Prosperity Region 5 | Year 2015

AGGRESSIVE SCENARIO	City of Midland 71 Lifestyle Clusters			Midland - 0.5 Mi. Ring 71 Lifestyle Clusters			Midland - 1.0 Mi. Ring 71 Lifestyle Clusters		
	Total	Owners	Renters	Total	Owners	Renters	Total	Owners	Renters
Total Housing Units	4,147	679	3,468	212	34	178	501	101	400
1   Detached Houses	1,486	649	837	90	31	59	272	97	175
2   Side-by-Side & Stacked	101	3	98	6	0	6	16	1	15
3   Side-by-Side & Stacked	203	1	202	11	0	11	26	0	26
4   Side-by-Side & Stacked	125	0	125	7	0	7	15	0	15
5-9   Townhse., Live-Work	561	2	559	32	0	32	78	0	78
10-19   Multiplex: Small	391	2	389	11	0	11	19	0	19
20-49   Multiplex: Large	403	5	398	17	1	16	24	1	23
50-99   Midrise: Small	274	6	268	16	1	15	21	1	20
100+   Midrise: Large	603	11	592	22	1	21	30	1	29
Total Units	4,147	679	3,468	212	34	178	501	101	400
Detached Houses	1,486	649	837	90	31	59	272	97	175
Duplexes & Triplexes	304	4	300	17	0	17	42	1	41
Other Attached Formats	2,357	26	2,331	105	3	102	187	3	184

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 Midland COUNTY | East Central Michigan Prosperity Region 5 | Year 2015

AGGRESSIVE SCENARIO	City of Midland 71 Lifestyle Clusters			City of Midland Upscale Target Markets			City of Midland Moderate Target Markets		
	Total	Owners	Renters	Total	Owners	Renters	Total	Owners	Renters
Total Housing Units	4,147	679	3,468	2,391	242	2,149	1,000	22	978
1   Detached Houses	1,486	649	837	714	229	485	105	5	100
2   Side-by-Side & Stacked	101	3	98	58	3	55	37	0	37
3   Side-by-Side & Stacked	203	1	202	110	1	109	82	0	82
4   Side-by-Side & Stacked	125	0	125	71	0	71	50	0	50
5-9   Townhse., Live-Work	561	2	559	328	2	326	191	0	191
10-19   Multiplex: Small	391	2	389	285	1	284	101	1	100
20-49   Multiplex: Large	403	5	398	257	1	256	140	4	136
50-99   Midrise: Small	274	6	268	152	1	151	118	5	113
100+   Midrise: Large	603	11	592	416	4	412	176	7	169
Total Units	4,147	679	3,468	2,391	242	2,149	1,000	22	978
Detached Houses	1,486	649	837	714	229	485	105	5	100
Duplexes & Triplexes	304	4	300	168	4	164	119	0	119
Other Attached Formats	2,357	26	2,331	1,509	9	1,500	776	17	759

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Annual Market Potential for Selected Target Markets - AGGRESSIVE SCENARIO

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

Places in Midland COUNTY | East Central Michigan Prosperity Region 5 | Year 2015

AGGRESSIVE SCENARIO	City of Coleman 71 Lifestyle Clusters			Village of Sanford 71 Lifestyle Clusters		
	Total	Owners	Renters	Total	Owners	Renters
Total Housing Units	71	19	52	25	10	15
1   Detached Houses	36	19	17	19	10	9
2   Side-by-Side & Stacked	2	0	2	0	0	0
3   Side-by-Side & Stacked	3	0	3	1	0	1
4   Side-by-Side & Stacked	1	0	1	0	0	0
5-9   Townhse., Live-Work	9	0	9	4	0	4
10-19   Multiplex: Small	4	0	4	0	0	0
20-49   Multiplex: Large	7	0	7	1	0	1
50-99   Midrise: Small	4	0	4	0	0	0
100+   Midrise: Large	5	0	5	0	0	0
<b>Total Units</b>	<b>71</b>	<b>19</b>	<b>52</b>	<b>25</b>	<b>10</b>	<b>15</b>
Detached Houses	36	19	17	19	10	9
Duplexes & Triplexes	5	0	5	1	0	1
Other Attached Formats	30	0	30	5	0	5

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

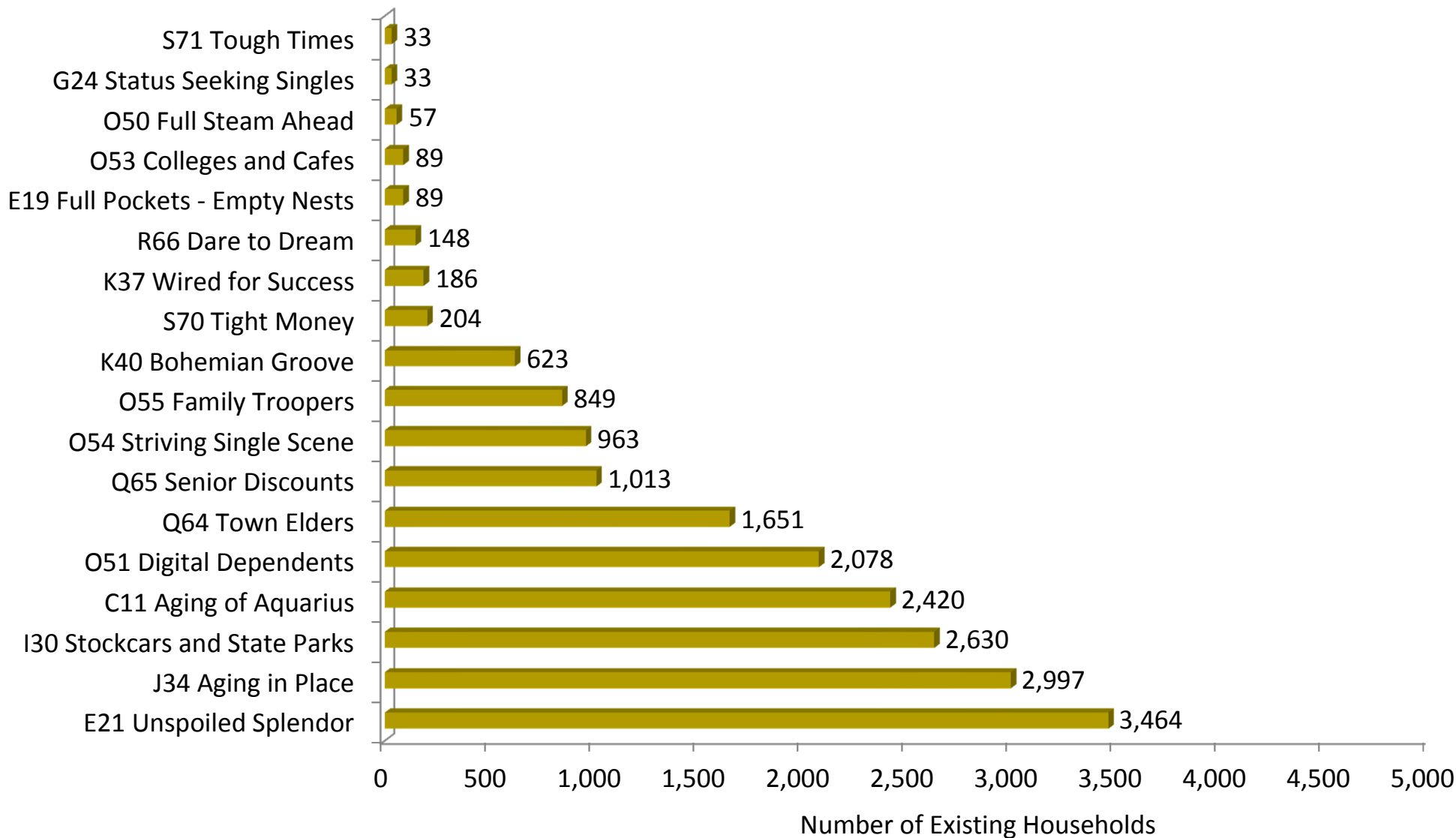
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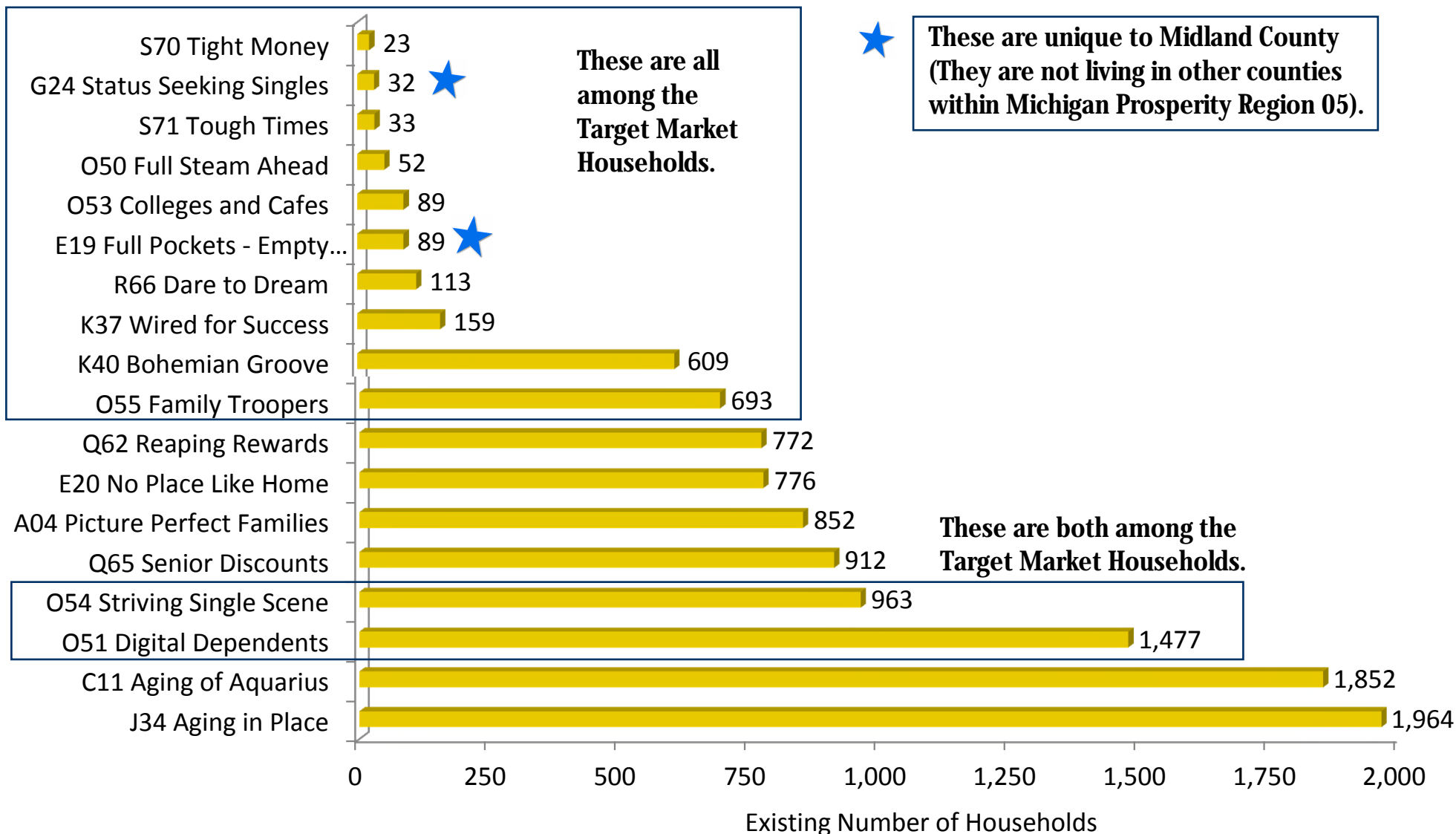
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Existing Households by Predominant Lifestyle Cluster  
 Midland COUNTY | ECM Prosperity Region 5 | Year 2015



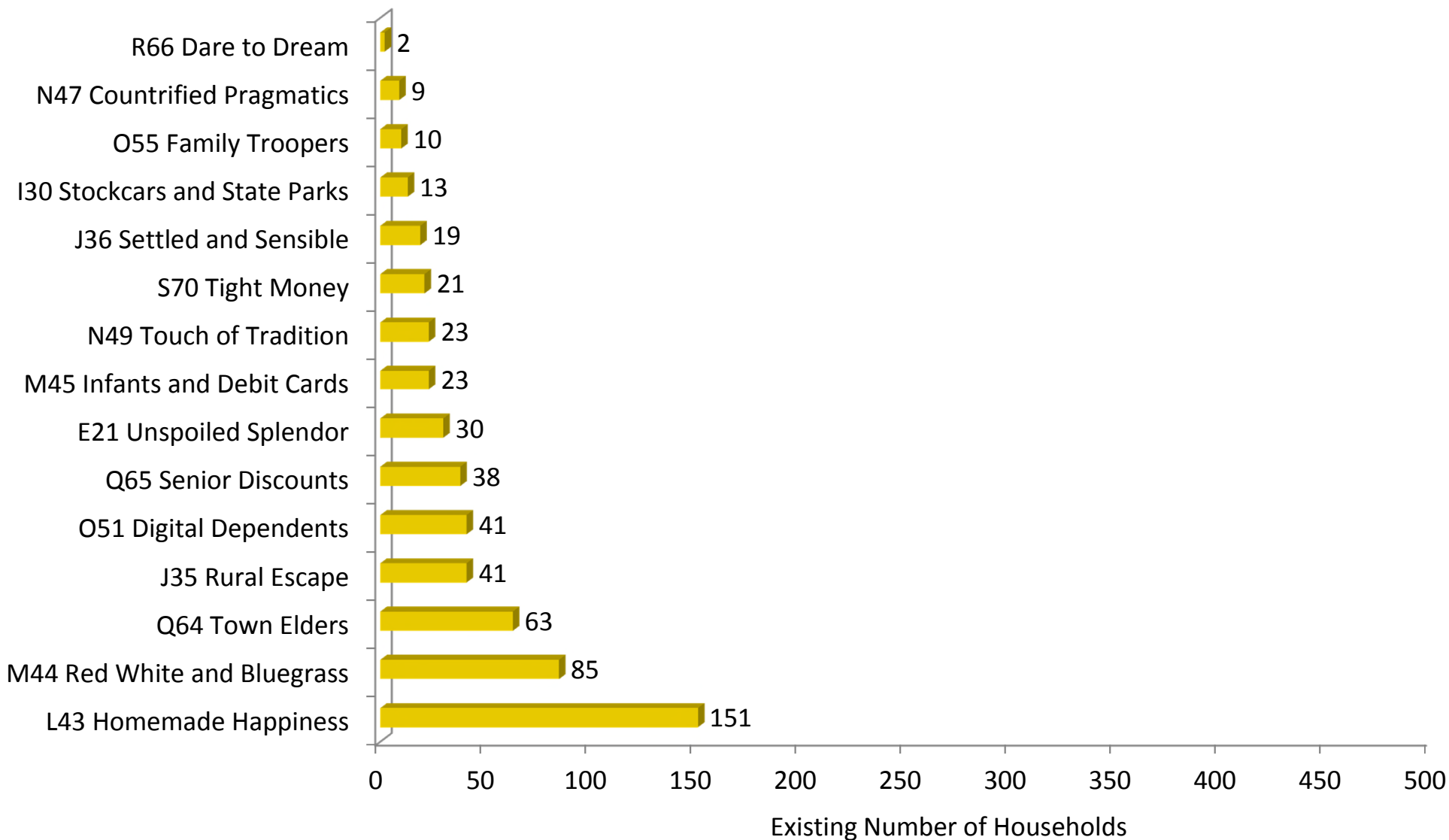
Source: Underlying Mosaic|USA data provided by Experian Decision Analytics and powered by Sites|USA, with results through year-end 2015. Analysis and exhibit prepared by LandUse|USA; 2016.

### Existing Households by Predominant Lifestyle Cluster The City of Midland | Midland County, Michigan | Year 2015



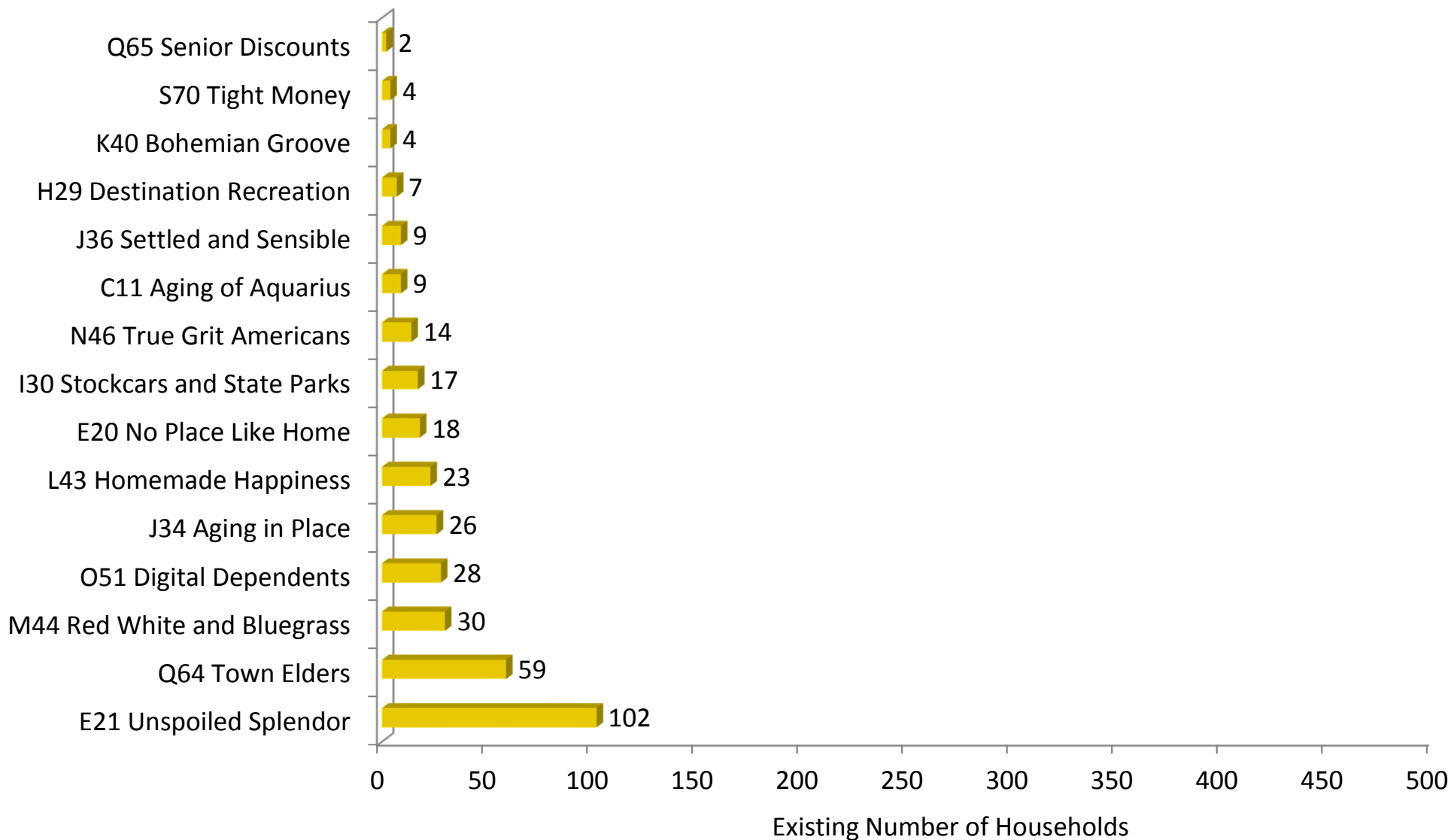
Source: Underlying Mosaic|USA data provided by Experian Decision Analytics and powered by Sites|USA, with results through year-end 2015. Analysis and exhibit prepared by LandUse|USA; 2016.

Existing Households by Predominant Lifestyle Cluster  
 The City of Coleman | Midland 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 Sanford | Midland 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.