

Planning Commission

Larry Fox, Chairperson Michael Mitchell, Vice-Chairperson Michelle LaRose, Commissioner

Summer L. McMullen, Trustee Keith Voight, Secretary Sue Grissim, Commissioner Tom Murphy, Commissioner

Planning Commission Meeting Agenda Online via WebEx at: https://hartlandtownship-214.my.webex.com/hartlandtownship-214.my/j.php?MTID=md98f912dced01a99a78a724a9401295a Thursday, January 28, 2021

7:00 PM

- 1. Call to Order
- 2. Pledge of Allegiance
- 3. Roll Call
- 4. Approval of the Agenda
- 5. Approval of Meeting Minutes
 - a. Planning Commission Special Meeting Minutes of January 7, 2021
 - b. Planning Commission Regular Meeting Minutes of January 14, 2021
- 6. Call to Public
- 7. Public Hearing
 - a. 2020-2021 Amendment to Future Land Use Map and Comprehensive Development Plan
- 8. Call to Public
- 9. Planner's Report
- 10. Committee Reports
- 11. Adjournment

In accordance with Public Act 228 of 2020, Hartland Township public meetings may be held virtually until further notice.

Agendas and Minutes are published on the Hartland Township website at: <u>https://www.hartlandtwp.com/meetings</u>

All virtual meetings of the Board of Trustees and Planning Commission are posted to Hartland Township's YouTube page within 48 hours of the conclusion of said meetings at: <u>https://www.youtube.com/channel/UCMQRFj949pT7c7PRasKMcFQ/videos</u>

The public may attend or participate in public comment at public meetings virtually, by following any of the steps below:

Via WebEx (on-line meetings): <u>https://hartlandtownship-214.my.webex.com/hartlandtownship-</u>214.my/j.php?MTID=md98f912dced01a99a78a724a9401295a

Via the WebEx app

- Join a meeting, with meeting number: 126 406 3560
- Enter the meeting password: HTWP18 (ensure there are no spaces before or after the password)

Via a cellular phone:

- Dial number 1-(415)-655-0001
- When prompted enter meeting 126 406 3560, then press #
- When prompted enter password: 489718, then press #

Via a landline phone (US Tolls may apply):

- Dial 1-415-655-0001
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- When prompted enter password: 489718, then press #

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How to Join a WebEx Video Conference Meeting: <u>https://www.youtube.com/watch?v=fE5FnEUKtaE</u>

Manage Audio and Visual Preferences for a WebEx Meeting: https://www.youtube.com/watch?v=VElbXzZCWjw

HARTLAND TOWNSHIP PLANNING COMMISSION DRAFT SPECIAL MEETING MINUTES

January 7, 2021 – 7:00 PM

This meeting was held via video conference in compliance with the Department of Health and Human Resources Emergency Order of December 7, 2020 under MCL 333.2253

1. <u>Call to Order:</u> Chair Fox called the meeting to order at 7:10 p.m.

2. <u>Pledge of Allegiance:</u>

3. <u>Roll Call and Recognition of Visitors:</u>

Present – Commissioners Fox (via video from Deerfield Township, MI), Grissim (Hartland Township, MI), LaRose (Hartland Township, MI), McMullen (Hartland Township, MI), Mitchell (Hartland Township, MI), Murphy (Hartland Township, MI), Voight (Hartland Township, MI) Absent – None

Also present Planning Director Troy Langer and Hartland Township Project Coordinator Andrew Kumar

4. 2021 Annual Planning Commission Organizational Meeting

 a. Hartland Township Planning Commission Rules and Procedures (By-Laws) Director Langer stated the amendment is the addition of a third member to the Site Plan Review Committee.

Commissioner Grissim offered a Motion to affirm the By-Laws as presented. Seconded by Commissioner Voight. Motion carried unanimously.

b. Election of Officers

Commissioner Mitchell offered a Motion to re-elect the same officers as 2020: Chair Larry Fox, Vice-Chair Michael Mitchell, Secretary Keith Voight. Seconded by Commissioner LaRose. Motion carried unanimously.

c. Committee Appointments

Chair Fox made the following Committee Appointments: Ordinance Review Committee: Grissim, Murphy, Voight Site Plan Review Committee: Fox, Voight, LaRose

Chair Fox also stated Michael Mitchell has been re-appointed as the Planning Commission representative to the Zoning Board of Appeals.

Chair Fox stated following the joint meeting of the Township Board and Planning Commission to discuss the Master Plan/Comprehensive Plan, he anticipates the creation of a short-term Master Plan Review Committee.

5. <u>Approval of the Meeting Agenda:</u>

A Motion to approve the January 7, 2021 Planning Commission Special Meeting Agenda was made by Commissioner Voight and seconded by Commissioner Murphy. Motion carried unanimously.

6. <u>Approval of Meeting Minutes:</u>

- a. Planning Commission Meeting Minutes of September 24, 2020
 A Motion to approve the Meeting Minutes of September 24, 2020 was made by Commissioner Grissim and seconded by Commissioner Mitchell. Motion carried unanimously.
- b. Planning Commission Meeting Minutes of October 8, 2020
 A Motion to approve the Meeting Minutes of October 8, 2020 was made by Commissioner Voight and seconded by Commissioner Murphy. Motion carried unanimously.
- 7. <u>Call to the Public:</u>

None

8. Old and New Business:

- a. 2021 Planning Commission Calendar
 - Director Langer summarized the calendar.

A Motion to approve the 2021 Planning Commission Meeting Calendar was made by Commissioner LaRose and seconded by Commissioner Mitchell. Motion carried unanimously.

9. <u>Call to the Public:</u>

None

10. Planner Report:

Director Langer reported the following:

• Director Langer stated there is training available for Planning Commissioners.

11. <u>Committee Reports:</u>

Commissioner Voight asked if the information on the Planning Commission contact list is correct. The Planning Commission briefly discussed the contact list and requested the Director have the list sent again.

Commissioner Voight asked if the January 14, 2021 Planning Commission Meeting would in person or virtual. Director Langer replied it will be virtual as we are still under the Emergency Order until January 15, 2021.

Chair Fox welcomed Commissioner McMullen to the Planning Commission.

12. Adjournment:

A Motion to adjourn was made by Commissioner Mitchell and seconded by Commissioner Murphy. Motion carried unanimously. The meeting was adjourned at approximately 7:27 PM.

HARTLAND TOWNSHIP PLANNING COMMISSION DRAFT REGULAR MEETING MINUTES

January 14, 2021 – 7:00 PM

This meeting was held via video conference in compliance with the Department of Health and Human Resources Emergency Order of January 13, 2021 under MCL 333.2253

- 1. <u>Call to Order:</u> Chair Fox called the meeting to order at 7:00 p.m.
- 2. <u>Pledge of Allegiance:</u>
- 3. Roll Call and Recognition of Visitors:

Present – Commissioners Fox (via video from Deerfield Township, MI), Grissim (Hartland Township, MI), McMullen (Hartland Township, MI), Mitchell (Hartland Township, MI), Murphy (Hartland Township, MI), Voight (Hartland Township, MI) Absent – Commissioner LaRose Also present Planning Director Troy Langer, Applicant Joseph Riccardi, Hartland Township Project Coordinator Andrew Kumar

4. <u>Approval of the Agenda:</u>

A Motion to approve the January 14, 2021 Planning Commission Regular Meeting Agenda was made by Commissioner Mitchell and seconded by Commissioner Grissim. Motion carried unanimously.

- 5. <u>Call to Public:</u> None
- 6. Old and New Business:
 - a. Site Plan #20-014 Private Shared Driveway (Riccardi) a request to construct a private shared driveway which is intended to provide access to two (2) single-family residential lots, which will be created under a separate land division application.

Director Langer gave an overview of the request stating the following:

- Property is located off Pleasant Valley near the curve
- Proposing a Land Division, which is approved administratively, and must add the necessary shared driveway which requires approval from the Planning Commission.

The Applicant, Joseph Riccardi, introduced himself but had nothing to add.

Chair Fox referred to the staff memo dated January 7, 2021and stated the following: Shared Driveway Standards

- No more than two single-family dwelling units may share a driveway. Complied.
- CA Conservation Agriculture zoning requires 200 feet of road frontage for each parcel. Complied.
- The applicant has provided a cross section for the shared driveway.
- Drainage: The Applicant supplied a cross section that shows an open ditch system for drainage on either side of the shared driveway.

- Public and Private Utility locations. Director Langer stated this generally applies to public water/sewer and would be difficult for the Application to provide this information but he will need to work with DTE and Consumers to locate electric and natural gas hookup locations if available. The Applicant stated the electric and gas lines run along the west side of Pleasant Valley and there is an easement for electric lines as well. The Director stated it will be up to the Applicant and his contractors to be aware of those locations during the construction process.
- Cost Estimate: The Director stated following approval, the Applicant will need to apply for a Land Use Permit for the construction of the shared driveway and set up a Developer Account to cover the required inspections by HRC. A cost estimate is typically how the amount of the deposit is determined. This will happen at a later date.
- Construction Standards: Chair Fox stated the driveway and T turnarounds meet the required standards.
- Shared Driveway Easement Agreement: Chair Fox stated they have complied with those requirements.
- Easement Maintenance Agreements: Chair Fox stated the applicant has provided easement maintenance agreements for the shared driveways.

Chair Fox asked if the Applicant had any questions regarding the Township Engineer and Fire Authority comments submitted. The Applicant had no questions or concerns.

Commissioner Grissim offered the following Motion:

Move to approve approval of Site Plan Application #20-014, a request to construct a private shared driveway which is intended to provide access to two (2) singlefamily residential lots, which will be created under a separate land division application.

Approval is subject to the following conditions:

- **1.** The applicant shall adequately address the outstanding items noted in the Planning Department's memorandum, dated January 7, 2021.
- 2. Applicant complies with any requirements of the Department of Public Works Director, Township Engineering Consultant, Hartland Deerfield Fire Authority, and any other governmental agency.
- **3.** Approval of the proposed shared driveway does not include approval of any future land divisions.
- 4. The proposed easement maintenance agreement shall comply with the requirements of the Township Attorney.

Seconded by Commissioner Murphy. Motion carried unanimously.

7. Call to Public:

None

8. <u>Planner's Report:</u>

Director Langer stated the order has been extended and virtual meetings are planned through the end of January.

9. <u>Committee Reports:</u>

None

10. Adjournment:

A Motion to adjourn was made by Commissioner Voight and seconded by Commissioner Murphy. Motion carried unanimously. The meeting was adjourned at approximately 7:21 PM.

Hartland Township Planning Commission Meeting Agenda Memorandum

Submitted By:	Troy Langer, Planning Director
Subject:	2020-2021 Amendment to Future Land Use Map and Comprehensive Development Plan
Date:	January 20, 2021

Recommended Action

Recommend Approval of the Amendments to the Future Land Use Map and Comprehensive Development Plan, as outlined in this Memorandum, dated January 20, 2021, and as outlined in the attachments.

Discussion

Since the last update to the Comprehensive Plan, in 2015, there have been some changes and additional information over the years that have been presented to the Planning Commission, as outlined below:

- The Township hired Gibbs Group to perform a Retail Market Analysis for Commercial Retail and Restaurants.
- The Township is in the process of extending municipal water down M-59 to serve several parcels.
- The Township has reviewed several development projects, including mixed use, commercial, and multi-family projects that are located along M-59. Some of these projects would be served by the extension of municipal water.
- In reviewing of several proposed multi-family development projects, the Township has gained additional information on successful multi-family developments.
- There are a series of on-going development trends in commercial retail and restaurant uses that are changing and the Township is very interested in making changes to accommodate these developing trends.

All of these factors have caused the Township Planning Commission to also re-examine a previously submitted Residential Market Analysis, by Zimmerman-Volk, which was completed in 2014.

As part of these changes, the Planning Commission established a sub-committee to examine the Township Future Land Use Plan and Comprehensive Development Plan to examine if any changes could be made to better accommodate these changes. The sub-committee incorporated the Residential Market Analysis and Retail Market Analysis as part of its examination.

Ultimately, the Township identified six (6) areas on the Future Land Use Map that should be amended to better accommodate potential future development, as well as protect the interests of existing property development. The following areas are outlined below:

Area #1 - South of Clyde Road, East of US-23

This area consists of 137.95 acres on the south side of Clyde Road and is currently designated in the multi-family residential category. The following parcels are part of this area:

4708-09-100-001	43.000 acres	South side of Clyde Road
4708-09-100-009	24.500 acres	South side of Clyde Road
4708-09-300-001	70.445 acres	South side of Clyde Road

The Future Land Use Map currently designates these properties in the Multiple-Family Residential category. The Comprehensive Development Plan indicates the following information on the Multiple-Family Residential category:

General Location. Multiple-Family Residential land uses are planned for approximately 574 274.01 acres within the Township. Attached condominium complexes and the existing apartment complex are found in this designation. It specifically includes the condominiums east of Hartland Road and south of Dunham Road, and the Oakbrook Apartment complex south of M-59 and west of Old US-23. Undeveloped areas for Multiple-Family Residential include lands north of M-59 and east of Clark Road, significant areas within the Waldenwoods Resort complex, and areas adjacent to the Planned Industrial R&D designation at the Clyde Road interchange.

Intended Land Uses. The Multiple-Family Residential designation is considered appropriate for land that is bordered on one or more sides by nonresidential uses and on the other sides by lower intensity single-family designations. The Multiple-Family Residential designation can serve as a buffer between higher intensity uses and single-family uses.

Characteristics. Multiple-Family Residential developments may consist of attached single-family homes, townhouses, or one to two story apartment buildings. New developments should have access to a paved primary road and have paved internal streets, along with amenities including open space and park areas, sidewalks, and infrastructure built to an adequate capacity. Landscaped buffer areas should be provided between the multiple-family use and adjacent single-family residential uses. Multiple-Family Residential areas are intended to permit developments with a maximum density of eight (8) units per acre.

Any strikeouts in the above paragraph and throughout this report indicate the language in the 2015 Amendment to the Comprehensive Development Plan, which is in the strikeout, with the current figures based on the 2020-2021 proposed amendment after.

Based on the Comprehensive Development Plan, multiple family residential developments can be used to serve as a buffer between higher intensity uses and single family uses; in addition, they should have amenities such as open space and parking areas, sidewalks, and infrastructure built to an adequate capacity. The Comprehensive Development Plan appears to be in line with the Retail Market Analysis performed by Gibbs Planning Group, which indicated that there is a growing trend towards walk ability developments. That report mainly focused retail development being walkable, but also including residential development in a mixed-use style development. Mixed-use developments could include apartments or condominium as the residential component. The Township has also had several multi-family development project proposals from major apartment complex management companies. They all echoed a similar focus on multiple family being developed near existing commercial developments. Residents of multi-family developments tend to desire to be located near restaurants and commercial shopping and entertainment. Those multi-family developments that are located further away from often become less desirable and are more likely to fall into disrepair.

In addition, the Residential Market Analysis indicated that the Township can absorb 500 new dwelling units over the next 5-6 years. Those units are a combination of rentals (150 units), multi-family condominiums

(56 units). Based on the development submittals and potential other multi-family development projects, the Township will exceed that amount of residential development and may over-saturate the market.

As a result, this area was targeted to be removed from the Multiple-Family category and changed to the single-family category that already surrounds this property, which is the Low Suburban Density Residential Category. The Low Suburban Density category is described as follows in the Comprehensive Development Plan:

General Location. Approximately $\frac{1,677}{1,757.49}$ acres of land have been planned for future Low Suburban Density residential land use. The Low Suburban Density Residential designation is one of the larger designations in terms of land area in the Township. The two principal areas with this designation include land on the north side of M-59 on the eastern side of the Township, stretching from Clark Road to the eastern boundary, and around the perimeter of Long Lake.

Intended Land Uses. This land use designation has been planned to accommodate a low density, traditional, neighborhood form of residential use, and to function as a transition from the Estate Residential designation and other higher intensity residential and nonresidential land uses. Long term agricultural uses are not expected to be maintained in the Low Suburban Density Residential areas though a continuation of some uses is expected.

Characteristics. New development within these areas should be compatible with the established large lot building pattern. New development should be encouraged to provide through streets, ample landscaping, open space, park areas, and pedestrian amenities. Landscaped buffers should be provided between such development and M-59 and other major thoroughfares.

The Low Suburban Density Residential land use designation is intended for new residential development on lots with an average density of one (1) to two (2) acres per dwelling unit.

Given that this area already surrounds the subject property, it was determined this would be a good fit for the area.

Recommendation for Area #1: Amend Future Land Use Map from Multiple Family Residential to Low Suburban Density Residential.

Area #2 - Southwest Corner of M-59 and Old US 23

4708-28-100-014	29.850 acres	South of M-59, West of Old US 23
4708-28-100-018	40.560 acres	South of M-59, West of Old US 23
4708-28-100-019	4.990 acres	South of M-59, West of Old US 23
4708-28-100-011	2.000 acres	South of M-59-West of Old US 23

The Future Land Use Map currently designates these properties in the Commercial category. The Comprehensive Development Plan indicates the following information on the Commercial category:

General Location. With the projected increase in population within the Township, and the retail and service demands that will be created by the increase, approximately 417 339.20 acres have been planned to accommodate future commercial land uses. The majority of commercial land uses within the Township are concentrated around the M-59 and US-23 interchange. This is the most intensive commercial area in the Township. Such uses should remain close to the interchange and not sprawl

along M-59. Other smaller areas of commercial land uses are planned at the US-23 and Clyde Road interchange as well as on the west side of Old US-23, between Crouse Road and M-59.

Intended Land Uses. Land uses in this category are intended to provide for both the sale of convenience goods and personal/business services for the day-to-day needs of the immediate neighborhood and provide for auto-oriented services, customer and entertainment services, and the sale of soft lines (apparel for men, women and children) and hard lines (hardware, furniture and appliances). As the community and region continues to grow, there will be additional demand for commercial uses within the Township.

Characteristics. Commercial development should be of a high quality architectural design with generous landscaping and screening from adjacent lower intensity uses. Parking areas should be limited to the minimum amount necessary to service the proposed land use, be broken up with large planting strips and landscaped islands, and provide safe and efficient circulation. The Township should encourage access management by limiting the number of curb cuts along major thoroughfares and encouraging cross access between developments.

The current Comprehensive Development Plan does not describe a Special Planning Area for this area, as there is only one (1) Special Planning Area in Hartland Township. That Special Planning Area in the Comprehensive Development Plan indicates that it is designed to be a mix of residential office, and commercial development to create a walkable pedestrian-oriented development. This description is very similar to comments in the Retail Market Analysis indicating that "retail centers could be developed....into a walkable, mixed-use development..." In addition, the Township has reviewed a concept plan for a mixed-use development within this area. As a result, the Planning Commission targeted this area as a potential mixed-use site. In order to permit mixed use developments, the Future Land Use Map designation for this area would need to be modified to accommodate residential, since the currently classification of "Commercial" does not permit any residential. A new Special Planning Area would aid in permitting a mixed-use development. The Comprehensive Development Plan should provide language to give guidance toward future development. The existing language was used as the framework in the draft.

In 2011, the Township approved an amendment to the Comprehensive Development Plan. In that amendment, the Special Planning Area had a density of 3 to 4 dwelling units per acre. For some reason, in the 2015 amendment to the Comprehensive Development Plan, this density was removed, and there is no specific density provided. Staff would recommend that the Planning Commission re-establish a density of 3 to 4 dwelling units per acre, as was previously provided. This will establish some metric to review development projects in the future. It is anticipated that the property would be developed with the Planned Development (PD) standards, which require density be established based on the Future Land Use Map designation and density. The PD also permits a bonus density of up to 40%; however, this would essentially be meaningless if the Future Land Use designated did not establish a density. Effectively, there would be no limit on the number of units that could be permitted in a Special Planning Area.

Recommendation for Area #2: Amend Future Land Use Map from Commercial to Special Planning Area.

Area #3 – East of Hartland Road, South of Dunham Road

This area consists of approximately 59.62 acres at the southeast corner of Hartland Road and Dunham Road. The Future Land Use Map designates these properties in the multi-family category. The following parcels are part of this area:

4708-21-100-001	0.770 acres	East Side of Hartland Road
4708-21-100-002	0.360 acres	East Side of Hartland Road
4708-21-100-012	1.540 acres	East Side of Hartland Road
4708-21-100-017	4.280 acres	East Side of Hartland Road
4708-21-100-019	1.700 acres	East Side of Hartland Road
4708-21-100-020	1.700 acres	East Side of Hartland Road
4708-21-100-027	5.000 acres	East Side of Hartland Road
4708-21-100-028	5.030 acres	East Side of Hartland Road
4708-21-100-029	2.360 acres	East Side of Hartland Road
4708-21-100-030	1.970 acres	East Side of Hartland Road
4708-21-100-031	2.540 acres	East Side of Hartland Road
4708-21-100-032	3.140 acres	East Side of Hartland Road
4708-21-100-033	1.940 acres	East Side of Hartland Road
4708-21-100-034	1.940 acres	East Side of Hartland Road
4708-21-200-005	10.320 acres	East Side of Hartland Road
4708-21-200-009	10.020 acres	East Side of Hartland Road
4708-21-200-010	5.010 acres	East Side of Hartland Road

The Future Land Use Map currently designates these properties in the Multiple-Family Residential category. Please see the description under Area #1 for a description in the Comprehensive Development Plan for the category of Multiple Family Residential.

This particular area consists of many separate parcels, ranging in size from approximately an acre to approximately ten (10) acres. It is unlikely that all of these parcels (or most of these parcels) could be assembled under common ownership to establish a large enough property to support a multi-family development that would be a walkable multi-family with such amenities that are outlined in the Comprehensive Development Plan, such as is located immediately to the south. Instead, what is more likely is single property owners would desire to rezone their individual property to Multiple Family, in anticipation of establishing a duplex or tri-plex, or some other multi-family structure development. With the existence of several single-family homes in the area, this would likely be met with resistance from the neighboring homeowners. As a result, this area does not appear to be a viable area for a multi-family development.

In addition, the Residential Market Analysis indicated that the Township can absorb 500 new dwelling units over the next 5-6 years. Those units are a combination of rentals (150 units), multi-family condominiums (56 units). Based on the development submittals and potential other multi-family development projects, the Township will exceed that amount of residential development and may over-saturate the market.

As a result, this area was targeted to be removed from the Multiple-Family category and changed to the single-family category that already surrounds this property, which is the Medium Suburban Density Residential Category. The Medium Suburban Density category is described as follows in the Comprehensive Development Plan:

General Location. This designation is also one of the larger land use categories; it has been planned for approximately 2,931 2,605.37 acres of the Township. These areas include some of the most recent development in the community. Hartland Estates, San Marino Estates, Meadow View Estates, Autumn Woods and other similar single-family developments are all located within Medium Suburban Density Residential areas. This land use designation has been assigned to the areas adjacent to Tyrone Lake and Dunham Lake, as well as the areas adjacent to the Township waste water treatment plant. Other areas include the Clark and Dunham Road vicinities, where opportunities exist for somewhat higher densities.

Intended Land Uses. The Medium Suburban Density Residential areas are intended to provide for slightly denser neighborhoods with larger lot homesites. As indicated by the name, these neighborhoods tend to be more suburban, than rural, in character.

Characteristics. The Medium Suburban Density Residential designation will permit new housing development on lots with an average density of one-half to one (1) acre in area per dwelling unit.

Given that this area already surrounds the subject property, it was determined this would be a good fit for the area.

Recommendation for Area #3: Amend Future Land Use Map from Multiple Family Residential to Medium Suburban Density Residential.

Area #4 - North of M-59, West of Clark Road

This area consists of 23.330 acres on the west side of Clark Road, north of the intersection with M-59 and is currently designated in the multi-family residential category. The following parcels are part of this area:

4708-21-400-046 23.330 acres North of M-59

The Future Land Use Map currently designates these properties in the Multiple-Family Residential category. Please see the description under Area #1 for a description in the Comprehensive Development Plan for the category of Multiple Family Residential.

This property is approximately twenty-three (23) acres in area and contains a fairly large wetland that may limit the amount of land that can actually be developed. The proposed Future Land Use designation for this property is the Medium Urban Density Residential category, which permits lot sizes of 8,000 square feet. This Future Land Use category would be consistent with the existing single family residential subdivision, located immediately across Clark Road to the East. The Comprehensive Development Plan outlines the following comments on this category:

General Location. The areas adjacent to Round, Handy and Maxfield Lakes, Millpointe subdivision, and Cobblestone Reserve site condominiums, are all included in the Medium Urban Density Residential designation. The undeveloped land northeast of the Clark and Dunham Road intersection, as well as southwest of the Old US-23 and Bergin Road interchange, is part of this designation which when combined totals approximately 911 935.13 acres.

Intended Land Uses. The Medium Urban Density Residential designation is intended to reflect the existing densities and character of the identified areas and to provide opportunities for new development that is consistent with the referenced neighborhood patterns.

Characteristics. In the Medium Urban Density Residential areas, land can be developed at a density of approximately two (2) or three (3) dwelling units per acre. Lot sizes are anticipated to be 8,000 to 20,000 square feet per dwelling.

Given that this area already surrounds the subject property, it was determined this would be a good fit for the area. In addition, a rezoning to multi-family may be viewed negatively by neighboring single family residential property owners in this area.

Recommendation for Area #4: Amend Future Land Use Map from Multiple Family Residential to Medium Urban Density Residential.

Area #5 – Hartland Glen Golf Course

This area consists of 385.09 acres on the south side of Cundy Road and north of Lone Tree Road. The following parcels are part of this area:

4708-26-100-019	383.150 acres	South of Cundy/M-59
4708-26-100-012	0.870 acres	South of Cundy
4708-26-100-001	1.070 acres	South of Cundy

The Future Land Use Map currently designates these properties in the Medium Suburban Residential category. The Comprehensive Development Plan has the following description of the Medium Suburban Residential category:

General Location. This designation is also one of the larger land use categories; it has been planned for approximately 2,931 2,605.37 acres of the Township. These areas include some of the most recent development in the community. Hartland Estates, San Marino Estates, Meadow View Estates, Autumn Woods and other similar single-family developments are all located within Medium Suburban Density Residential areas. This land use designation has been assigned to the areas adjacent to Tyrone Lake and Dunham Lake, as well as the areas adjacent to the Township waste water treatment plant. Other areas include the Clark and Dunham Road vicinities, where opportunities exist for somewhat higher densities.

Intended Land Uses. The Medium Suburban Density Residential areas are intended to provide for slightly denser neighborhoods with larger lot homesites. As indicated by the name, these neighborhoods tend to be more suburban, than rural, in character.

Characteristics. The Medium Suburban Density Residential designation will permit new housing development on lots with an average density of one-half to one (1) acre in area per dwelling unit.

This property is currently being considered for development and that development includes the extension of municipal water and sewer to service this site. The property is already served with municipal sanitary sewer and has over 600 residential equivalent units (REU's) to are available to serve this site. With the investment going into this property, consideration was given to permit a density that would support that type of investment and would also be consistent with the surrounding properties. As a result, the Special

Planning Area was viewed as a category that would allow for the flexibility to create density and open areas that would be a proper fit for this area.

In 2011, the Township approved an amendment to the Comprehensive Development Plan. In that amendment, the Special Planning Area had a density of 3 to 4 dwelling units per acre. For some reason, in the 2015 amendment to the Comprehensive Development Plan, this density was removed, and there is no specific density provided. Staff would recommend that the Planning Commission re-establish a density of 3 to 4 dwelling units per acre, as was previously provided. This will establish some metric to review development projects in the future. It is anticipated that the property would be developed with the Planned Development (PD) standards, which require density be established based on the Future Land Use Map designation and density. The PD also permits a bonus density of up to 40%; however, this would essentially be meaningless if the Future Land Use designated did not establish a density. Effectively, there would be no limit on the number of units that could be permitted in a Special Planning Area.

Recommendation for Area #5: Amend Future Land Use Map from Medium Suburban Density to Special Planning Area.

Area #6 - South of M-59

This area consists of approximately 79.89 acres on the south side of M-59, east of Pleasant Valley Road and is currently designated in the multi-family residential category. The following parcels are part of this area:

4708-25-100-002	5.000 acres	South of M-59
4708-25-100-003	0.400 acres	South of M-59
4708-25-100-004	29.00 acres	South of M-59
4708-25-100-008	3.600 acres	South of M-59
4708-25-100-013	28.00 acres	South of M-59
4708-25-100-016	5.100 acres	South of M-59
4708-25-100-017	2.500 aces	South of M-59
4708-25-100-018	2.000 acres	South of M-59
4708-25-100-019	2.000 acres	South of M-59
4708-25-100-020	2.290 acres	South of M-59

The Future Land Use Map currently designates these properties in the Multiple-Family Residential category. Please see the description under Area #1 for a description in the Comprehensive Development Plan for the category of Multiple Family Residential.

This particular area consists of many separate parcels, ranging in size from approximately a half-acre to approximately twenty-eight (28) acres. It is unlikely that all of these parcels (or most of these parcels) could be assembled under common ownership to establish a large enough property to support a multi-family development that would be a walkable multi-family with such amenities that are outlined in the Comprehensive Development Plan, such as is located immediately to the south. Instead, what is more likely

is single property owners would desire to rezone their individual property to Multiple Family, in anticipation of establishing a duplex or tri-plex, or some other multi-family structure development. With the existence of several single-family homes in the area, this would likely be met with resistance from the neighboring homeowners. As a result, this area does not appear to be a viable area for a multi-family development.

As a result, this area was targeted to be removed from the Multiple-Family category and changed to the single-family category that already surrounds this property, which is the Low Suburban Density Residential Category. Please see the description under Area #1 for a description in the Comprehensive Development Plan for Low Suburban Density Residential.

Given that this area to the south is already in this category, it was determined this would be a good fit for the area.

Recommendation for Area #6: Amend Future Land Use Map from Multiple Family Residential to Low Suburban Density Residential.

Summary

The Township continues to have an interest having successful commercial retail/restaurants as well as residential areas. The Township has taken efforts to perform a study of the residential market and retail markets in the area. The proposed changes to the Future Land Use Map and Comprehensive Development Plan are being done with the intent to further those goals.

Attachments

- 1. Oakland County Letter to Hartland
- 2. 2004 Future Land Use Map
- 3. 2011 Future Land Use Map
- 4. 2015 Future Land Use Map
- 5. Residential Market Study
- 6. Retail Market Study
- 7. Draft 2020-2021 Comprehensive Plan Amendment
- 8. 2020-2021 Future Land Use Map Amendment



December 15, 2020

Mr. Troy Langer, Planning Director Hartland Township 2655 Clark Road Hartland, MI 48353

Dear Mr. Langer:

On December 10, 2020, Oakland County received notice of the **Draft 2020-2021 Hartland Township Comprehensive Plan Amendment (Oakland County Code Master Plan No. 20-03).** Under the Michigan Planning Enabling Act, Oakland County has 42 days to submit comments on draft plans.

The Oakland County Coordinating Zoning Committee (CZC) made a motion at their December 1, 2020 meeting to **waive their right to review**, **endorse**, **or make recommendations** on any Master Plan updates, amendments or township rezoning cases that would fall after their last scheduled meeting of December 1, 2020. The 2021 schedule for the CZC has not been established or confirmed at this time and a proper review of the submitted materials would require a CZC meeting date after December 1, 2020.

The Oakland County Department of Economic Development and Community Affairs (EDCA), Planning and Economic Development Services staff will not prepare a review for this amendment but will encourage the Oakland County Townships of Highland, Milford, and Rose to review the proposed amendments and provide comments as they deem necessary.

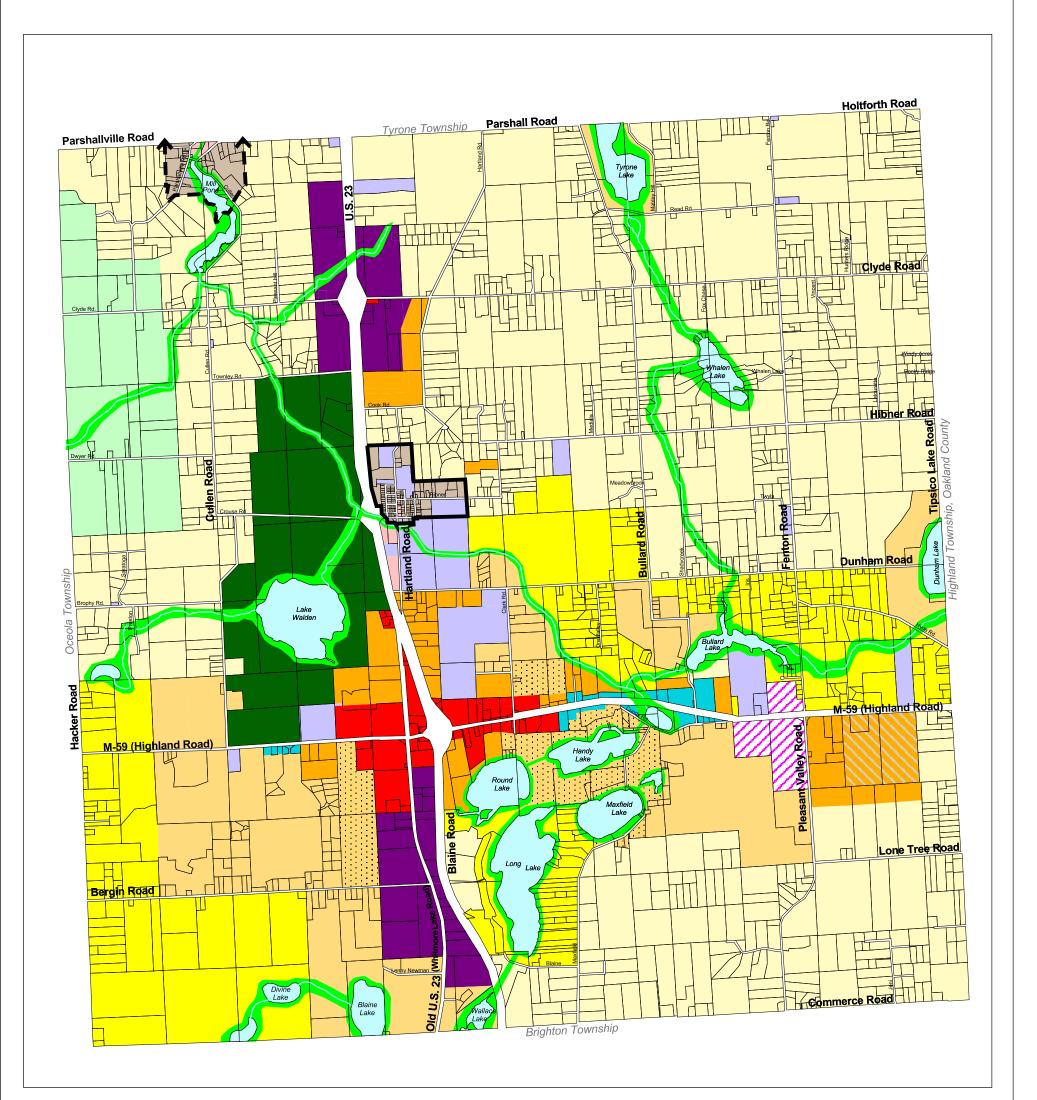
If you have questions or comments about this process, please do not hesitate to call me at (248) 858-0389 or email me at <u>krees@oakgov.com</u>.

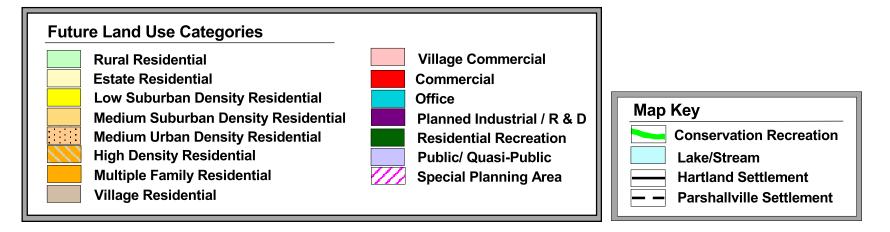
Sincerely, There Scott E. Kree

Senior Planner



Hartland Township, Livingston County, Michigan





Map 7 Future Land Use - 20 Year Projection

Basemap Source: Livingston County Data Source: McKenna Associates, Inc. 7/2002

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Hartland Township

Livingston County, Michigan

Future Land Use Map

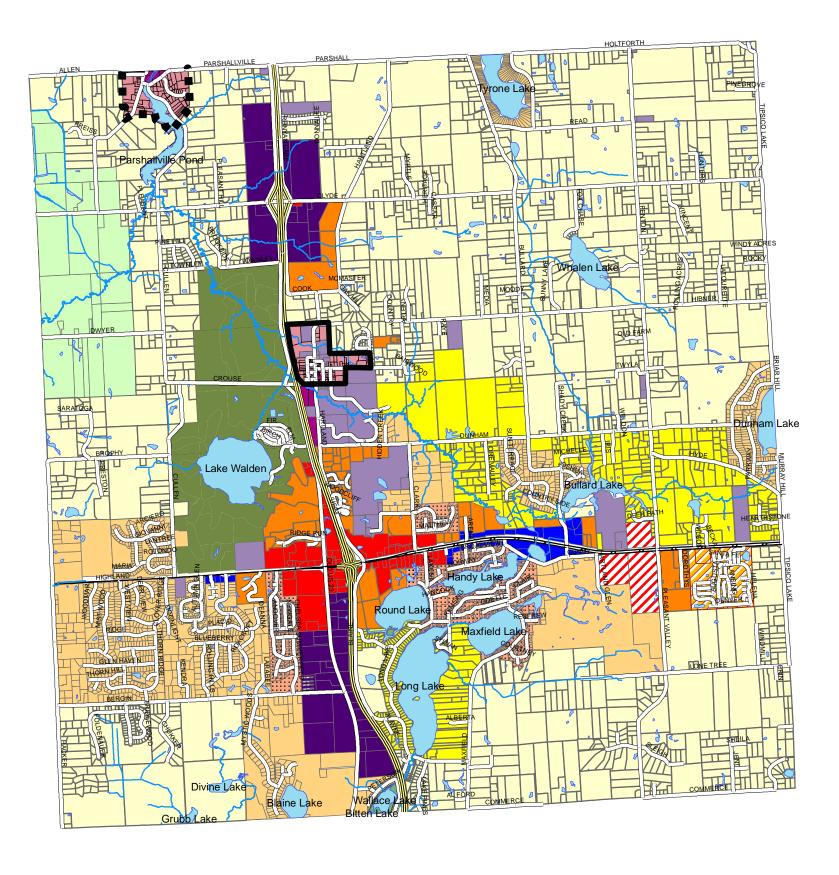


Map Key Hartland Village Settlement

Parshallville Settlement

Basemap Source:Livingston CountyData Source:McKenna Associates Inc. 8/2004Hartland Township 3/2011







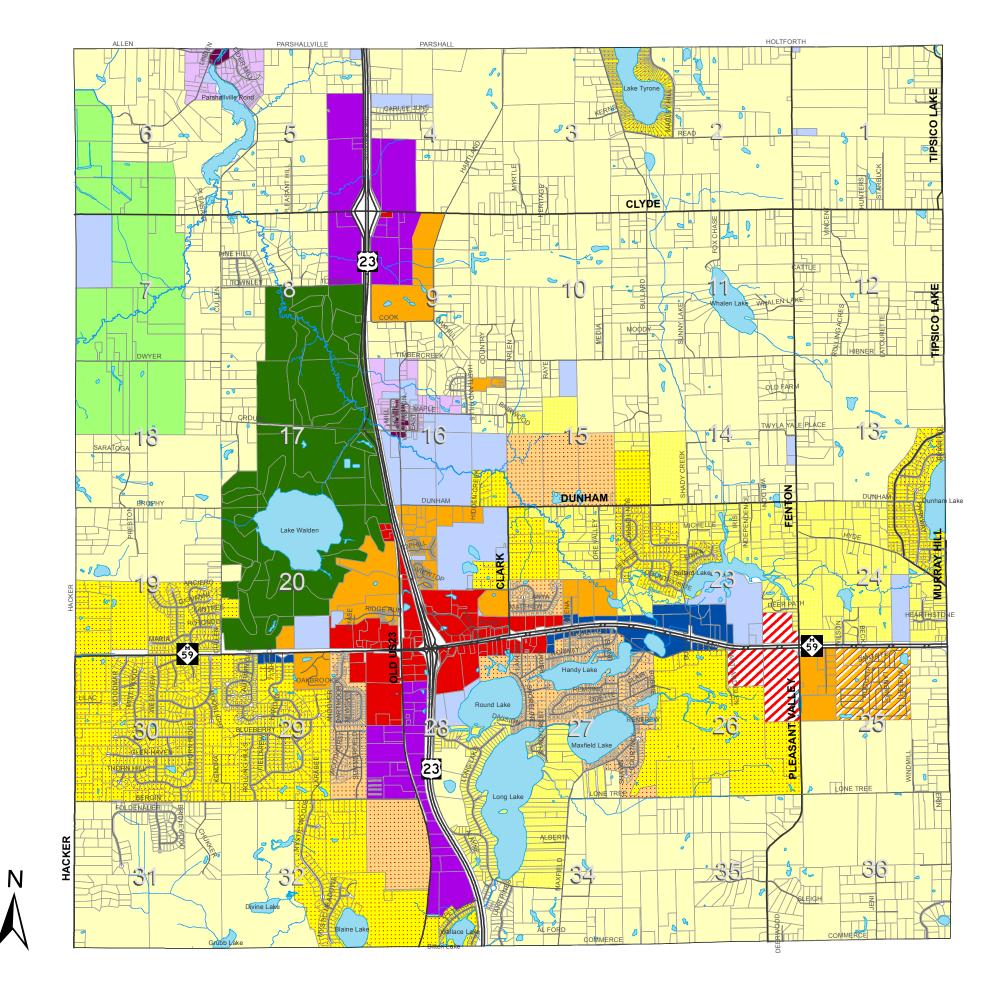
Hartland Township Livingston County, MI

FUTURE LAND USE MAP

Adopted September 1, 2015

Future Land Use CategoriesCommercialEstate ResidentialEstate ResidentialHigh Density ResidentialLow Suburban Density ResidentialMultiple Family ResidentialMedium Suburban Density ResidentialMedium Urban Density ResidentialOffice

- Planned Industrial / R & D
- Public / Quasi-Public
- Residential Recreation
- Rural Residential
- Special Planning Area
 - Village Commercial
 - Village Residential



Map Created By: Hartland Township Planning Department Basemap Source: Livingston County

Recommended for Approval by the Hartland Township Planning Commission on July 30, 2015 Adopted by the Hartland Township Board of Trustees on September 1, 2015

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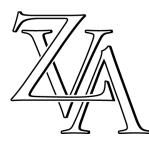
AN ANALYSIS OF RESIDENTIAL MARKET POTENTIAL

Hartland Township

Livingston County, Michigan

August, 2014

Conducted by ZIMMERMAN/VOLK ASSOCIATES, INC. P.O. Box 4907 Clinton, New Jersey 08809



ZIMMERMAN/VOLK ASSOCIATES, INC.

P.O, Box 4907 Clinton, New Jersey 08809 908 735-6336 www.ZVA.cc • info@ZVA.cc

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Research & Strategic Analysis

AN ANALYSIS OF RESIDENTIAL MARKET POTENTIAL

Hartland Township Livingston County, Michigan

August, 2014

INTRODUCTION

This study identifies the optimum market position for new housing units that could be developed over the next several years in Hartland Township, Michigan.

The extent and characteristics of the potential market for new and existing housing units within the township were identified using Zimmerman/Volk Associates' proprietary target market methodology. In contrast to conventional supply/demand analysis—which is derived from supply-side dynamics and baseline demographic projections—target market analysis establishes the market potential for new and existing housing based on the housing preferences and socioeconomic characteristics of households in the relevant draw areas.

The target market methodology is particularly effective in defining realistic housing potential for new and existing neighborhoods because it encompasses not only basic demographic characteristics, such as income qualification and age, but also less-frequently analyzed attributes such as mobility rates, lifestage, lifestyle patterns, and household compatibility issues (*see* METHODOLOGY *provided with detailed tabular data in a separate document*).

In brief, using the target market methodology, Zimmerman/Volk Associates determined:

• <u>Where</u> the potential renters and buyers of new and existing housing units in Hartland Township are likely to move from (the draw areas);

- <u>How many</u> households, in groups with annual incomes of \$50,000 or more, have the potential to move within and to the township each year (depth and breadth of the market);
- <u>What</u> their housing preferences are in aggregate (rental or ownership, multi-family or single-family);
- <u>Who</u> the households are that represent the potential market for new and existing units in the Township (the target markets);
- <u>What</u> their current housing alternatives are (relevant rental and for-sale development in the market area);
- <u>What</u> the target households are currently able to pay (market-entry base rents and prices); and
- <u>How</u> quickly the new units will lease or sell (absorption forecasts).

CONCLUSIONS OF THE ANALYSIS_

This study has determined that, from the market perspective, up to 500 new rental and for-sale market-rate dwelling units could be developed and absorbed within Hartland Township over the next five to six years.

- The study has established that an annual average of 1,260 households represent the potential renters and buyers of new and existing housing units within Hartland Township each year over the next five years.
- These 1,260 households are in target groups with median annual incomes of \$50,000 or more.
- 380 of these 1,260 households are potential renters of new housing units.
 - The annual incomes of these 380 households can support base rents, excluding utilities, ranging from \$850 to \$1,500 per month, for studio to three-bedroom units containing 600 to 1,250 square feet.
 - Based on the recommended unit configurations and proposed rents, absorption is forecast at an average of 60 units per year.
 - To achieve this absorption pace, new rental development in Hartland Township would need to capture less than 16 percent of the 380 annual potential renters of new units.
- 140 of those 1,260 households are potential purchasers of new condominiums (multi-family for-sale).
 - The annual incomes of these 140 households can support base prices of condominiums ranging from \$150,000 to \$265,000, for one- to threebedroom units containing 900 to 1,650 square feet.
 - Based on the recommended unit configurations and proposed prices, absorption is forecast at an average of 12 units per year.

- To achieve this absorption pace, new condominium construction would need to capture just 8.6 percent of the 140 annual potential condominium purchasers.
- 150 of those 1,260 households are potential purchasers of new rowhouses/townhouses (single-family attached for-sale).
 - The annual incomes of these 150 households can support base prices of new townhouses ranging from \$185,000 to \$300,000, for two- and three-bedroom units containing 1,150 to 1,650 square feet.
 - Based on the recommended unit configurations and proposed prices, absorption is forecast at an average of 12 units per year.
 - To achieve this absorption pace, new townhouse construction would need to capture just eight percent of the 150 annual potential purchasers of townhouses.
- 230 of those 1,260 households are potential purchasers of new village houses (low-range single-family detached for-sale).
 - The annual incomes of these 230 households can support base prices of new village houses ranging from \$195,000 to \$285,000 for two- and three-bedroom units containing 1,200 to 1,800 square feet.
 - Based on the recommended unit configurations and proposed prices, absorption is forecast at an average of 16 units per year.
 - To achieve this absorption pace, new village house construction would need to capture just seven percent of the 230 annual potential purchasers of new village houses.
- 210 of those 1,260 households are potential purchasers of new neighborhood houses (mid-range single-family detached for-sale).

- The annual incomes of these 210 households can support base prices of new neighborhood houses ranging from \$295,000 to \$375,000 for threeand four-bedroom units containing 1,850 to 2,500 square feet.
- Based on the recommended unit configurations and proposed prices, absorption is forecast at an average of 14 units per year.
- To achieve this absorption pace, new construction would need to capture just 6.7 percent of the 210 annual potential purchasers of new neighborhood houses.
- 150 of those 1,260 households are potential purchasers of new estate houses (high-range single-family detached for-sale).
 - The annual incomes of these 150 households can support base prices of new estate houses ranging from \$400,000 to \$500,000 for four-bedroom units containing 2,550 to 3,300 square feet.
 - Based on the recommended unit configurations and proposed prices, absorption is forecast at an average of 10 units per year.
 - To achieve this absorption pace, new construction would need to capture only 6.7 percent of the 150 annual potential purchasers of new estate houses.

As derived from the target households' tenure and housing propensities, 500 new units would include 150 new rental apartments; 56 new condominiums; 60 new townhouses; 91 new village houses; 83 new neighborhood houses; and 60 new estate houses. Again, annual market capture is projected at 60 rental units, 12 condominiums, 12 townhouses, 16 village houses, 14 neighborhood houses, and 10 estate houses—a total of 124 new units absorbed per year, of which 64 are new for-sale units.

Based on those projections, 150 new rental apartments would be leased in two and a half years; 56 condominiums would be sold in less than five years; and 60 fee-simple townhouses, 91 village houses, 83 neighborhood houses, and 60 estate houses would be sold in less than six years. (Absorption periods for for-sale housing types are always longer than for rentals.)

Housing types (*see* UNIT AND BUILDING TYPES *at the end of this document*) that could be developed in and around the intersection of Highland Road with Fenton/North Pleasant Valley Roads include:

- Small condominium multi-family buildings ("mansion" apartment buildings that accommodate from four to six units and resemble large single-family detached houses);
- Larger rental multi-family buildings ("courtyard" apartment buildings, preferably with commercial ground-floor uses);
- For-sale townhouses in small groups (no more than three or four in a row).

Housing types that could be developed in and around the area east of the Hartland High School, Hartland Middle School, and the Creekside Elementary School, south of the Village Elementary School, and north of Dunham Road include village, neighborhood, and estate detached houses.

Housing types that could be developed in and around the intersection of U.S. Route 23 and Clyde Road include rental and condominium multi-family buildings and for-sale townhouses.

Financing for mixed-use buildings is often very challenging to obtain, even in times of normal capital flows. For example, small mixed-use buildings often exceed the Fannie Mae and Freddie Mac maximums for non-residential uses, precluding access to the secondary mortgage market. Small properties have also historically had difficulties attracting public capital assistance in any form; because of their small size, they are generally not considered to have the potential for catalytic impact, despite the fact that several strategically-located smaller buildings can often establish a neighborhood more effectively than the same number of units in a single location.

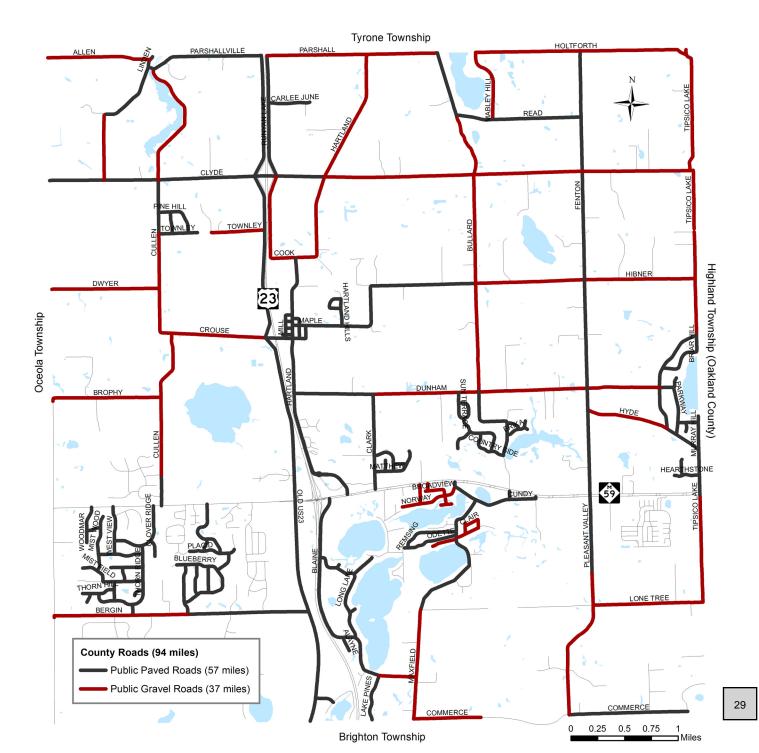
OVERVIEW OF HARTLAND TOWNSHIP

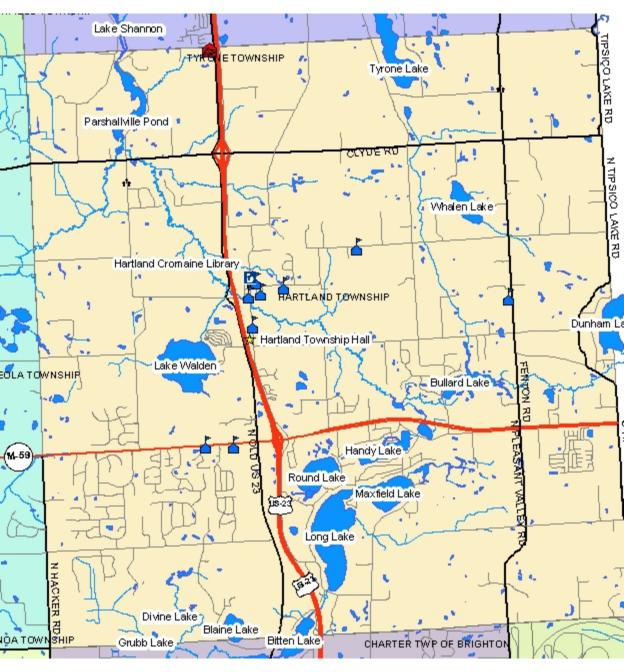
Hartland Township is situated on the eastern edge of Livingston County, encompassing approximately 37.7 square miles, and bordered by Tyrone Township to the north, Highland Township in Oakland County to the east, Brighton Township to the south, and Oceola Township to the west. The township was established at the same time as the county, in 1836, and much of its growth is attributable to the Crouse family, with the arrival of the Crouse brothers, Robert and Chauncey, in 1842.

Hartland Township is located approximately 10 miles north of the City of Brighton and approximately 10 miles east of the City of Howell. The City of Ann Arbor lies 26 miles south of the township via U.S. 23 South, and Detroit is 51 miles southeast of Hartland Township via U.S. 23 South, Interstates 96 and 696, and the John C. Lodge Freeway. Lansing, the state capitol, is reached via West Highland Road (M-59), Interstate 96, and Interstate 496.

Two major thoroughfares intersect in Hartland Township: M-59, which crosses the township in an east-west direction, linking Interstate 96 in Howell and Interstate 94 in the east; and U.S. 23, which, on its way from Jacksonville, Florida to Mackinaw City, crosses the township in a northsouth direction. One other road, Clyde Road, traverses the entire township from east to west, and it is a gravel road west of U.S. 23. Only one other road, Fenton Road/North Pleasant Valley Road, runs from beyond the township's northern border to beyond the township's southern border and it turns to gravel north of Lone Tree Road. Livingston County has jurisdiction over 94 of the 106 miles of public roads in the township, and 37 of those 94 miles are unpaved. (*See* MAP *following this page*.)

The nearest airport is Bishop International Airport, located in Flint 24 miles from Hartland Township, accommodating domestic flights and some flights to Canada. Offering similar service is the Capital Region International Airport in Lansing, 54 miles away. The largest airport, approximately 51 miles from Hartland, is Detroit Metropolitan Wayne County Airport, a Delta Airlines hub, with domestic and international service provided by a variety of airlines.





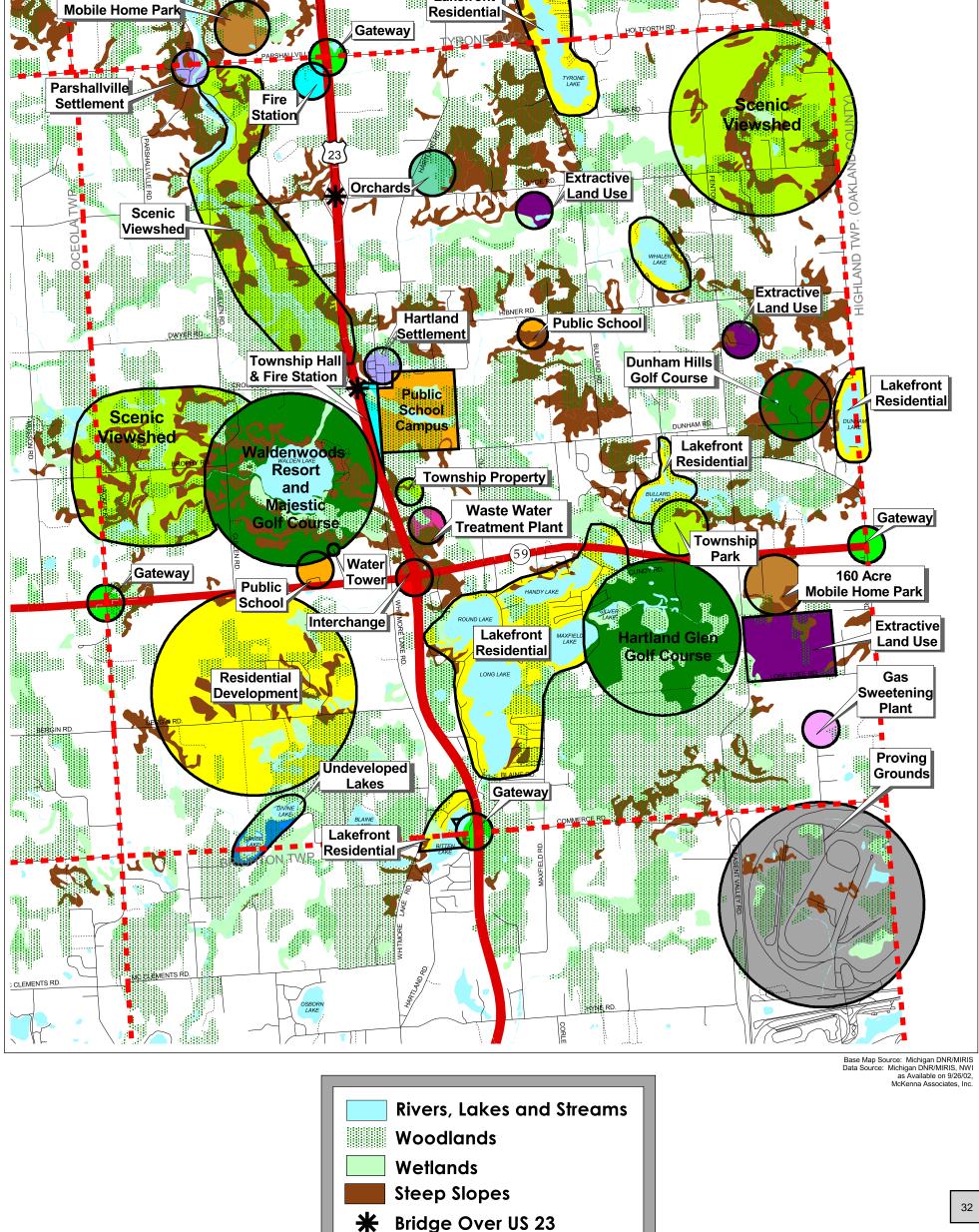
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The principle settlement in Hartland Township is the township's historic downtown, Hartland Village, which flanks Avon Road/Hartland Road north of Crouse Road. The village is home to several important township institutions: the Florence B. Dearing Museum, the Hartland Music Hall, the United States Post Office, the Cromaine Village Library, the Hartland Village Cemetery, as well as historic churches, residences, shops, eateries, and small businesses, and the Hartland Village Elementary School on Hibner Road. The Hartland Township Fire Hall, Hartland High School, Hartland Middle School, and the Creekside Elementary School are all located off Hartland Road south of the village.

Hartland Township Hall and the 100-acre Hartland Settlers Park are located on Clark Road; Hartland Heritage Park, which includes 10 sports fields for football, lacrosse, and soccer, is found on Highland Road west of Fenton Road. Multiple lakes and waterways are situated throughout the township; Lake Walden is site of the Waldenwoods Family Recreation Resort and the 27-hole Majestic at Lake Walden Golf Course and Jerry Matthews driving range. The township is also home to the 36-hole Hartland Glen Golf Course and driving range located south of Highland Road and to the Dunham Hills Golf Club on Dunham Road.

Parshallville is a smaller settlement only partially located in Hartland Township and is the site of the Parshallville Cider Mill (formerly Tom Walker's Grist Mill), a 136-year-old water-powered mill, which during the autumn produces and sells cider, apples and related foodstuffs.

The central business district in Hartland Township is now found in and around the intersections of M-59 (Highland Road) with Old U.S. Highway 23, U.S. 23, and Hartland Road. This area includes two major grocery stores, Meijer and Kroger, a Walmart Supercenter, and a Target, stores which anchor shopping centers featuring national, local and regional tenants, ranging from restaurants, coffee shops, beauty parlors, a Best Western, to multiple other purveyors of goods and services.



Based on past demographic trends, the Nielsen Company, a respected provider of Census-based demographic data, estimates that the township's *population* reached 15,055 persons in 2014, up from 14,663 persons as of the 2010 Census, an increase of almost 2.7 percent. That growth was in addition to the gain of more than 3,360 persons between the 2000 Census and the 2010 Census. Nielsen projects that the city's population will climb to 15,450 persons by 2019, an increase of over 2.6 percent over the next five years. (*See* Table 1.)

There were 3,698 *households* in Hartland Township as of the 2000 Census, rising to 5,154 households by the 2010 Census. Between 2014 and 2019, the number of households are projected to increase from 5,286 to 5,426 households. The 2019 projection represents household growth of more than 46 percent since the year 2000.

The number of persons per household has a significant impact on the type of housing required by households living in the township.

- Just under 51 percent of all households currently living in Hartland Township contain just one or two persons (almost nine percentage points below the national share of 59.5 percent).
- 17.9 percent contain three persons (compared to the national share of 16.2 percent).
- The remaining 31.4 percent contain four or more persons (24.3 percent nationally).

The composition of those households can also affect the type of housing required and influence housing preferences.

- Approximately a third of the township's households can be characterized as traditional families, *e.g.*—married couples with children under age 18 (21.8 percent nationally).
- Non-traditional families with children, *e.g.*—single persons with children under 18, represent less than eight percent of the township's households (11.7 percent nationally).
- The remaining 58.4 percent of Hartland Township households do not have children under 18 and include married couples (33.8 percent), other non-traditional family

households (4.3 percent, related adults living in the same households), and 20.3 percent non-family households (unrelated or single adults living in the same household).

Median household income in the township is estimated at \$78,122, almost 17 percent higher than the Livingston County median of \$66,938. More than a third of Hartland Township's households have incomes above \$100,000 per year.

The township's population is less diverse than the nation as a whole.

- Nearly 96 percent of the township's current residents are white (71.3 percent nationally).
- Less than one percent are African American (12.7 percent nationally).
- 1.2 percent are Asian (over five percent nationally).
- The remaining 2.3 percent are native Hawaiian, some other race, or a mix of two or more races (16 percent nationally).

Less than three percent of the population is Hispanic/Latino by origin, predominantly Mexican, Puerto Rican, and Cuban (17.6 percent nationally).

Hartland Township residents are significantly better educated than the nation as a whole. Over 34 percent of all township residents aged 25 or older have a college or advanced degree, well above the national share of 28.4 percent.

Single-family detached houses are the predominant housing type in Hartland Township.

- Nearly 81 percent of the township's 5,574 housing units are single-family detached houses (61.6 percent in the U.S.).
- Three percent are single-family attached units (5.8 percent nationally).
- 1.2 percent are units in two-unit buildings (3.8 percent nationally]).
- 5.4 percent are located in buildings of three to 19 units (just under 14 percent nationally).
- Less than one percent are in buildings of 20 or more units (8.5 percent nationally).

• Nearly 8.7 percent of township units are mobile homes, trailers, boats, RVs, or vans (6.7 percent nationally).

Approximately five percent of all township housing units are currently estimated to be vacant. Of the 5,286 occupied units, 12.6 percent are rented and 87.4 percent are owner-occupied, a very high homeownership rate—the national homeownership rate is 65 percent.

The median year built of the township's housing stock is 1992. Over 27 percent of all housing units were built during the 1990s, with over 20 percent constructed during the 1970s, and just under 20 percent between 2000 and 2004. The median value of owner-occupied dwelling units in the township is estimated at \$200,142, almost 10 percent higher than the national median of \$182,100.

Residents of Hartland Township also have higher rates of automobile ownership than the nation as a whole, in part because there is very limited public transportation in the township.

- 2.3 percent of the township's households do not own an automobile (just under 10 percent nationally).
- Less than 20 percent own only one vehicle (34 percent nationally).
- Nearly 78 percent own two or more vehicles (nearly 57 percent nationally).

The primary transportation to work for Hartland Township employees aged 16 and older is the automobile, again because there are few transportation alternatives in the township.

- Nearly 88 percent drive alone to work (76.4 percent nationally).
- Just under seven percent car-pool (9.8 percent nationally).
- Only 0.15 percent take public transportation (five percent nationally)
- Just 1.7 percent walk to work (less than three percent nationally).
- The remaining 3.5 percent either work at home (2.6 percent) or have other means of getting to work (0.9 percent). (Nationally, 4.3 percent work at home, and over 1.7 percent have other means.)

Approximately 66 percent of the township's residents over age 16 are employed in white-collar occupations, 20.8 percent blue-collar, and 13.2 percent service and farm occupations. Nationally, white-collar jobs make up more than 60 percent of all employment, blue-collar 20.4 percent, and service and farm occupations 18.9 percent.

Nearly three-quarters of the township's residents over age 16 are employed by private businesses, six percent work for non-profit private companies, and 12.3 percent are local, state, or federal government employees. Just 6.8 percent are self-employed, and 0.17 percent are unpaid family workers.

By occupation, sales and related jobs account for the largest percentage of civilian employees, at 12.1 percent, followed by office and administrative support at 11.7 percent, and management positions at 10.7 percent. These are roughly comparable to the national numbers: nationally, sales and related occupations represent just under 11 percent; office and administrative support 13.7 percent; and management 10.7 percent of national civilian employment.

SOURCES: U.S. Bureau of the Census; The Nielson Company; Zimmerman/Volk Associates, Inc.

Key Demographic Data **2014 Estimates**

	Hartland Township	Livingston County	United States
Population	15,055	183,764	317,199,353
Households	5,286	69,210	120,163,305
Housing Units	5,574	74,761	135,654,502
1&2 pp HHs†	50.7%	56.6%	59.5%
3 pp HHs	17.9%	17.2%	16.2%
4+ pp HHs	31.4%	26.2%	24.3%
Married couples w/ children	33.7%	28.0%	21.8%
Single persons w/ children	7.9%	7.9%	11.7%
HHs without children	58.4%	64.1%	66.5%
Median HH income	\$78,122	\$66,938	\$51,579
HHs below \$25,000	8.5%	14.5%	24.4%
White	95.6%	95.9%	$71.3\% \\ 12.7\% \\ 5.0\% \\ 16.0\% \\ 17.6\%$
African American	0.9%	0.9%	
Asian	1.2%	0.9%	
Other	2.3%	2.3%	
Hispanic/Latino	2.9%	2.4%	
Single-family attached units	3.0%	5.3%	5.8%
Single-family detached units	80.8%	80.6%	61.6%
Units in 2-unit bldgs.	1.1%	1.0%	3.8%
Units in 3- to 19-unit bldgs.	5.4%	6.1%	13.7%
Units in 20+-unit bldgs.	1.0%	1.3%	8.5%
Mobile home or trailer	8.7%	5.7%	6.7%
Vacant units	5.2%	7.4%	11.4%
Renter-occupied units	12.6%	14.8%	35.0%
Owner-occupied units	87.4%	85.2%	65.0%
Units new since 2005	8.2%	5.7%	15.8%
Median housing value	\$200,142	\$181,207	\$182,060
No vehicle ownership	2.3%	3.3%	9.2%
Own 1 vehicle	19.8%	24.7%	33.9%
Own 2 or more vehicles	77.9%	72.0%	56.9%
Drive alone	87.9%	85.7%	76.4%
Car-pool	6.8%	7.8%	9.8%
Take public transportation to work	0.2%	0.2%	5.0%
Walk to work	1.7%	1.1%	2.8%
Other	3.4%	5.2%	6.1%
White-collar employment	66.0%	63.4%	60.7%
Blue-collar employment	20.8%	21.6%	20.4%
Service/farm employment	13.2%	15.0%	18.9%

† HH=Household

SOURCES: U.S. Bureau of Census; The Nielsen Company; Zimmerman/Volk Associates, Inc.

Employment Information Hartland Township, Livingston County, Michigan **2014 Estimates**

Population 16+	11,720	
By Employment Status	11,720	100.0%
In Armed Forces	16	0.1%
Employed Civilians	7,491	63.9%
Unemployed Civilians	667	5.7%
Not in Labor Force	3,546	30.3%
Employed Civilian By Worker Class	7,649	100.0%
For-Profit Private	5,717	74.7%
Non-Profit Private	460	6.0%
Local Government	562	7.3%
State Government	305	4.0%
Federal Government	72	0.9%
Self-Employed	520	6.8%
Unpaid Family	13	0.2%
Employed Civilian By Occupation	7,649	100.0%
Architect/Engineer	367	4.8%
Arts/Entertainment/Sports	34	0.4%
Building Grounds Maintenance	198	2.6%
Business/Financial	492	6.4%
Community/Social Services	137	1.8%
Computer/Mathematical	194	2.5%
Construction/Extraction	339	4.4%
Education/Training/Library	451	5.9%
Farming/Fishing/Forestry	16	0.2%
Food Preparation/Serviing	375	4.9%
Health Practitioner/Technician	639	8.4%
Healthcare Support	94	1.2%
Maintenance Repair	438	5.7%
Legal	59	0.8%
Life/Physical/Social Sciences	34	0.4%
Management	821	10.7%
Office / Administrative Support	898	11.7%
Production	515	6.7%
Protective Services	137	1.8%
Sales/Related	926	12.1%
Personal Care/Services	190	2.5%
Transportation/Moving	295	3.9%

SOURCES: U.S. Bureau of Census; The Nielsen Company; Zimmerman/Volk Associates, Inc.

MARKET POTENTIAL FOR HARTLAND TOWNSHIP

The most recent Livingston County migration and mobility data—as derived from taxpayer records compiled by the Internal Revenue Service from 2006 through 2010 and from the 2012 American Community Survey five-year estimates for Hartland Township—shows that the <u>draw</u> <u>areas</u> for new and existing housing units in the township include the following:

- The primary draw area, covering households currently living within the township.
- The <u>secondary</u> draw area, covering households currently living in the balance of Livingston County.
- The <u>regional</u> draw area, covering households that are likely to move from Oakland, Genesee, and Ingham Counties.
- The <u>metropolitan</u> draw area, covering households that are likely to move from Washtenaw and Wayne Counties.
- The <u>national</u> draw area, covering households with the potential to move to Hartland Township from all other U.S. counties (primarily other Michigan counties).

As derived from the migration and mobility analyses, then, the draw area distribution of market potential (those households with the potential to move within or to Hartland Township each year over the next five years) is shown as follows:

Market Potential by Draw Area Hartland Township, Livingston County, Michigan

Hartland Township (Primary Draw Area):	19.4%
Balance of Livingston County (Secondary Draw Area):	30.1%
Oakland, Genesee, and Ingham Counties (Regional Draw Area):	18.3%
Washtenaw and Wayne Counties (Metropolitan Draw Area):	15.1%
Balance of US (National Draw Area):	<u>17.1</u> %
Total:	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2014.

As determined by the target market methodology, which accounts for household mobility within Hartland Township, as well as mobility patterns for households currently living in all other counties, an average of 1,260 households represent the annual potential market for new and existing housing units within the township each year over the next five years.

The tenure and housing preferences of those 1,260 draw area households are shown on the following table (*see also* Table 2):

Tenure/Housing Type Propensities Annual Average Market Potential For New and Existing Housing Units Hartland Township, Livingston County, Michigan

HOUSING TYPE	Number of Households	Percent Of Total
Multi-family for-rent (lofts/apartments, leaseholder)	380	30.1%
Multi-family for-sale (lofts/apartments, condo/co-op ownership)	140	11.1%
Single-family attached for-sale (townhouses/live-work, fee-simple/ condominium ownership)	150	11.9%
Low-range single-family detached for-sale (houses, fee-simple ownership)	230	18.3%
Mid-range single-family detached for-sale (houses, fee-simple ownership)	310	16.7%
High-range single-family detached for-sale (houses, fee-simple ownership)	150	<u>11.9</u> %
Total	1,260	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2014.

Hartland Township Livingston County, Michigan

August, 2014

The market-driven tenure ratio of approximately 30 percent rental/70 percent ownership is weighted significantly more towards rental units than the current tenure ratio township of approximately 13 percent rental/87 percent ownership in the township.

Annual Market Potential

Distribution Of Annual Average Number Of Draw Area Households With The Potential To Move Within/To Hartland Township Each Year Over The Next Five Years Households in Groups With Median Annual Incomes Above \$50,000

Hartland Township

Livingston County, Michigan

Hartland Township, Livingston County, Regional Draw Area, Metropolitan Draw Area, and Balance of the United States Draw Areas

Annual Average Number Of Households With The Potential To Rent/Purchase Within Hartland Township 1,260

Annual Market Potential

	Ми Fan						
	For-Rent	C			Detached		Total
Total Households: {Mix Distribution}:		140 11.1%	150 11.9%	230 18.3%	210 16.7%	150 11.9%	1,260 100.0%

Optimum Residential Mix

{Mix Distribution}:	30.1%	11.1%	11.9%	18.3%	16.7%	11.9%	100.0%
Mix Distribution 500 du:	150	56	60	91	83	60	500

NOTE: Reference Appendix One, Tables 1 Through 11.

The protracted ownership housing slump since 2008 has led to a measurable shift in market preferences from home ownership to rental dwelling units, particularly among younger households, yielding a higher share of consumer preference for multi-family rentals even among relatively affluent consumers than would have been typical less than a decade ago. At the same time, there has been a significant shift in preferences from suburban subdivisions toward mixed-use, walkable urban neighborhoods.

From the demographic perspective, this shift has been driven by the convergence of the preferences of the two largest generations in the history of America: the Baby Boomers (currently estimated at 77 million), born between 1946 and 1964, and the estimated 78 million Millennials, who were born from 1977 to 1996 and, in 2010, surpassed the Boomers in population. The convergence of two generations of this size—simultaneously reaching a point when urban housing in walkable neighborhoods matches their life stage—is unprecedented.

In addition to their shared preference for walkable urban living, the Boomers and Millennials are changing housing markets in multiple ways. In contrast to the traditional family (married couples with children) that comprised the typical post-war American household, Boomers and Millennials are households of predominantly singles and couples. As a result, the 21st Century home-buying market now contains more than 63 percent one- and two-person households, and the 37 percent of the homebuyers that could be categorized as family households are equally likely to be non-traditional (*e.g.*—single parents or unrelated couples of the same sex with one or more children, adults caring for younger siblings, to grandparents with custody of grandchildren) as traditional families. A major consequence of this evolution is that mixed-income development is now more likely to succeed than when suburban preferences dominated the housing market.

As determined by the target market analysis, then, and reflective of these national trends, the annual potential market—delineated by lifestage—for new housing units within Hartland Township can be characterized by general household type as follows (*see also* Table 3):

• Younger singles and childless couples—45 percent;

- Traditional and non-traditional families—37 percent; and
- Empty nesters and retirees—18 percent.

The largest segment (45 percent) of the annual potential market is younger singles and couples. This generation—the Millennials—is the first to have been largely raised in the suburbs where cul-de-sacs substituted for neighborhoods, malls took the place of downtowns, and driver's license became a necessity of life. In far greater numbers than predecessor generations, Millennials are moving to downtown and walkable neighborhoods. Younger households typically choose to live in neighborhoods that contain a diverse mix of people, housing types, and uses. For the most part, younger households tend to be "risk-tolerant," and will move into areas or neighborhoods that would not be considered acceptable for most families or older couples.

Family-oriented households represent 37 percent of the market for new and existing units within the township. In the 1980s, when the majority of the Baby Boomers were in the full-nest lifestage, the "traditional family household" (married couple with one or more children) comprised more than 45 percent of all American households. That demographic has now fallen to less than 22 percent of all American households (approximately 34 percent in Hartland Township). In addition to reflecting the aging of the Baby Boomers into the empty-nest lifestage, households with children are now increasingly diverse and in some areas are largely non-traditional families.

At 18 percent, the empty nester and retiree segment comprises a smaller than typical share of the potential market, in part because of their inability to sell—or reluctance to sell at a perceived loss—their existing residences. These households—for the most part, the Baby Boom generation—have been moving from the full-nest to the empty-nest life stage at an accelerating pace that will peak sometime in this decade and continue beyond 2020. Since the first Boomer turned 50 in 1996, empty-nesters have had a substantial impact on downtown and walkable neighborhoods. After fueling the diffusion of the population into ever-lower-density exurbs for nearly three decades, many Boomers are now looking for mixed-use, walkable neighborhoods. A significant percentage of these households are retirees, with incomes from social security; some

also have pensions, very few have savings or investments. Many of the empty-nest households are still employed.

Those household groups that represent the target markets for new and existing housing units in the township, their estimated median incomes and estimated median home values in 2014, are shown on the following table:

Primary Target Groups (In Order of Median Income) Hartland Township, Livingston County, Michigan

Household	Median	Median Home
Түре	INCOME	VALUE (IF OWNED)
Empty Nesters & Retirees		
Urban Establishment	\$109,000	\$413,200
Small-Town Establishment	\$100,100	\$268,800
Cosmopolitan Elite	\$96,800	\$239,600
New Ēmpty Nesters	\$87,800	\$186,500
RV Retirees	\$67,800	\$160,500
Blue-Collar Empty Nesters	\$66,700	\$132,300
Middle-Class Move-Downs	\$64,100	\$149,900
No-Nest Suburbanites	\$62,000	\$139,900
Exurban Suburbanites	\$53,000	\$111,800
Traditional & Non-Traditional Familie	es	
Nouveau Money	\$132,900	\$281,000
Ex-Urban Elite	\$128,700	\$300,100
Unibox Transferees	\$104,400	\$221,200
Full-Nest Exurbanites	\$92,600	\$185,900
Full-Nest Suburbanites	\$87,900	\$181,000
Full-Nest Urbanites	\$77,100	\$217,600
New-Town Families	\$69,500	\$145,100
Small-Town Families	\$68,100	\$132,800
Multi-Ethnic Families	\$64,800	\$138,200
Blue-Collar Button-Downs	\$62,200	\$181,000
Multi-Cultural Families	\$54,700	\$121,400

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Household Type	Median Income	Median Home Value (if owned)
Younger Singles & Couples		, , , , , , , , , , , , , , , , , , ,
The Entrepreneurs	\$126,000	\$331,300
e-Types	\$110,300	\$335,900
Ex-Urban Power Couples	\$105,000	\$256,200
The VIPs	\$91,500	\$227,900
Fast-Track Professionals	\$91,200	\$251,500
Upscale Suburban Couples	\$83,200	\$193,100
Cross-Training Couples	\$70,500	\$171,600
New Bohemians	\$69,100	\$217,600
Twentysomethings	\$68,600	\$235,900
Suburban Achievers	\$60,300	\$163,300
Small-City Singles	\$59,300	\$122,400
Urban Achievers	\$55,500	\$197,300

NOTE: The names and descriptions of the market groups summarize each group's tendencies—as determined through geo-demographic cluster analysis—rather than their absolute composition. Hence, every group could contain "anomalous" households, such as emptynester households within a "full-nest" category.

SOURCE: Zimmerman/Volk Associates, Inc., 2014.

Detailed descriptions of each target market group are provided in a separate document: APPENDIX THREE, TARGET MARKET DESCRIPTIONS

Annual Market Potential By Household Type

Distribution Of Annual Average Number Of Draw Area Households With The Potential To Move Within/To Hartland Township Each Year Over The Next Five Years Households in Groups With Median Annual Incomes Above \$50,000

Hartland Township

Livingston County, Michigan

		Multi-		Single- 							
	Total	For-Rent	For-Sale		Low-Range						
Number of Households:	1,260	380	140	150	230	210	150				
Empty Nesters & Retirees	18%	13%	18%	17%	28%	19%	13%				
Traditional & Non-Traditional Families	37%	26%	14%	37%	39%	50%	60%				
Younger Singles & Couples	45%	61%	68%	46%	33%	31%	27%				
-	100%	100%	100%	100%	100%	100%	100%				

THE MARKET CONTEXT

Only one rental property included in the survey—Oakbrooke Apartments—is located in Hartland Township. (*Reference* Table 4.) Oakbrooke, situated just off Highland Road, is leasing 276 one- to three-bedroom flats, ranging in rent from \$839 per month for an 815-square-foot one-bedroom (\$1.03 per square foot) to \$1,099 per month for a 1,235-square-foot three-bedroom (\$0.89 per square foot). Community amenities consist of a pool, fitness center, and a cyber café. Garages are available for some of the apartments.

Eleven properties included in the survey are located in the Howell area, and another four in Brighton. All of the surveyed properties are at functional full occupancy—95 percent or higher—with the smallest property containing just 90 units (Aberdeen of Brighton), and the largest 264 units (Burwick Farms in Howell).

—One-Bedroom Units—

All but one of the 15 properties in Howell and Brighton—Aberdeen of Brighton—contain onebedroom apartments.

- Rents for one-bedroom units in Howell start at \$495 per month at Quail Creek on Greenwich Drive; one-bedroom units in Brighton start at \$625 per month at Lexington Manor on East Grand River.
- The most expensive one-bedroom rent is \$1,575 per month for a 961-squarefoot apartment at Westbury Apartments on Westbury Boulevard in Howell.
- One-bedroom units range in size from 600 square feet (Brighton Cove in Brighton) to 960 square feet (Burwick Farms in Howell).
- One-bedroom rents per square foot fall between \$0.66 and \$1.64.

—Two-Bedroom Units—

All 15 properties lease two-bedroom apartments; two of the two-bedroom floorplans are townhouses, at Grand Plaza Apartments and the Preserve at Mallard Pond.

- Rents for two-bedroom units start at \$540 per month at the afore-mentioned Quail Creek.
- The highest two-bedroom rent is nearly \$2,100 per month for an upper unit at Westbury Apartments.
- Two-bedroom units range in size from approximately 740 square feet at Pine Hill Apartments to 1,619 square feet at the Preserve at Mallard Pond in Howell.
- Two-bedroom rents per square foot fall between \$0.55 and \$1.57.

—Three-Bedroom Units—

Five of the 15 properties are leasing three-bedroom apartments.

- Rents for three-bedroom units in Howell start at \$849 per month at Quail Creek; and \$725 per month in Brighton at Lexington Manor.
- The most expensive three-bedroom rent is \$2,300 per month for a 1,479-squarefoot apartment with two bathrooms at Westbury Apartments in Howell.
- Three-bedroom units range in size from 1,250 square feet (Lakeshore Village in Howell) to 1,739 square feet (Aberdeen of Brighton).
- Three-bedroom rents per square foot fall between \$0.68 and \$1.56.

Brighton Glens, on Williamson Drive in Brighton, is also renting 619-square-foot studio apartments for \$699 per month (\$1.13 per square foot), the only property that has studios.

Most, but not all, of the properties provide community amenities, which range from a pool and/or playground, to the extensive facilities at Westbury Apartments, the most expensive property in the survey. In addition to a pool and playground, Westbury Apartments includes a whirlpool and sauna, fitness center and business center, concierge services, and tennis courts.

Summary Of Selected Rental Properties

Livingston County, Michigan

June, 2014

Number Hartland Township Oakbrooke Apartments 1950 Oakbrooke Drive 276 n/a Deal, 2br/2ba \$839 to 815 to \$0.90 to Jamma 2br/2ba \$899 to 1,050 \$0.90 to fitness center, cyber cafe. 2br/2ba \$899 to 1,050 \$0.90 to fitness center, cyber cafe. Quail Creek 108 \$1,074 to 1,185 \$0.89 to 527 Greenwich Drive 108 \$495 to \$500 \$0.66 to Clubhouse, tennis. 527 Greenwich Drive 108 \$495 to \$500 \$0.66 \$0.75 \$0.65 Clubhouse, tennis. 527 Greenwich Drive 108 \$495 to \$00,75 \$0.55 to 307 Holly Hills Drive 207 207 \$500 \$0.62 \$0.97 \$0.85 to 307 Holly Hills Drive 10br/1ba \$663 to \$0.97 \$0.85 to 307 Holly Hills Drive 138 \$20r/1ba \$570	Property Address	Number o <u>f Units</u>	Unit Type	Reported Base Rent		Reported Unit Size		Rent per Sq. Ft.		Additional Information
$\begin{array}{cccccccccccccccccccccccccccccccccccc$	11111055		E	Iartland Townsh	ip					
$\begin{array}{cccccccccccccccccccccccccccccccccccc$	Oakbrooke Apartments	276								n/a
$\begin{array}{c c c c c c c c c c c c c c c c c c c $			1br/1ba	\$839	to	815	to	\$0.99	to	
$\begin{array}{cccccccccccccccccccccccccccccccccccc$				\$859		865		\$1.03		fitness center,
3br/2ba \$1,074 to 1,185 to \$0.89 to to 3br/2ba \$1,074 to 1,185 to \$0.91 to Howell Howell Howell Quail Creek 108 \$495 to 750 \$0.66 to \$0,074 to 527 Greenwich Drive 1br/1ba \$495 to 750 \$0.65 to \$0.74 to 307 Holly Hills Drive 207 5650 to \$0.97 to \$0.97 to 307 Holly Hills Drive 207 5650 to \$0.97 to \$0.97 to 307 Holly Hills Drive 207 5650 to \$0.97 to \$0.97 to 307 Holly Hills Drive 1br/1ba \$6650 to \$0.97 to \$0.97 to 2br/1ba \$650 to \$0.97 to \$0.97 to \$0.97 to 401 S. Highlands Way 1br/1ba \$664 to \$0.97 to \$0.85 to 1br/1ba TH \$829 to \$700 to \$0.85 to \$0.97 to 401 S. Highlands Way 1br/1ba TH \$829 to \$1.08 to \$0.85 to 1br/1ba TH \$829 to \$1.36 to \$0.85 to \$0.86 to 103 S. Latson			2br/2ba	\$899	to	1,000		\$0.88	to	cyber cafe.
						1,050		\$0.90		
L HowellQuail Creek108 \mathbf{v} \mathbf{v} \mathbf{v} \mathbf{v} $\mathbf{n/a}$ 527 Greenwich Drive1br/1ba $\frac{$455}{555}$ to750 $$0.74$ toClubhouse, tennis.2br/1ba $\frac{$550}{560}$ to975 $$0.55$ to98% occupancy307 Holly Hills Drive207 \mathbf{v} \mathbf{v} \mathbf{v} \mathbf{v} \mathbf{v} 307 Holly Hills Drive1br/1ba $$655$ to $$712$ to $$0.97$ to 401 S. Highlands Way1br/1ba $$664$ 700 $$0.95$ to $$108$ $2br/1ba$ $$2br/1ba$ $$664$ $$700$ $$0.95$ to $$108$ $2br/1ba$ $$664$ $$700$ $$0.95$ to $$108$ $$0.97$ to 401 S. Highlands Way1br/1ba $$664$ $$700$ $$0.95$ to $$108$ $$0.95$ to $2br/1ba$ $$2br/1ba$ $$975$ $$0.80$ $$0.955$ to $$108$ $$0.955$ to 103 S. Latson168 $$10r/1ba$ $$675$ to $$850$ $$0.79$ to $$0.86$ $$0.80,85$ to 103 S. Latson1br/1ba $$770$ $$730$ $$0.85$ to $$908$ $$0.956$ $$0.80,85$ to 103 S. Latson1br/1ba $$750$ $$750$ $$0.850$ $$0.86,85$ $$0.80,85$ $$0.80,85$ $$0.80,85$ $$0.80,85$ $$0.80,85$ $$0.80,85$ $$0.80,85$ $$0.80,85$ $$0.80,85$ $$0.80,85$ $$0.80,85$ <td></td> <td></td> <td>3br/2ba</td> <td></td> <td>to</td> <td></td> <td></td> <td></td> <td>to</td> <td></td>			3br/2ba		to				to	
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$ \begin{array}{cccccccccccccccccccccccccccccccccccc$				\$650						
$ \begin{array}{cccccccccccccccccccccccccccccccccccc$			2br/1ba		to		to		to	
$\begin{array}{cccccccccccccccccccccccccccccccccccc$				\$745		874		\$0.96		
$\begin{array}{cccccccccccccccccccccccccccccccccccc$	Grand Plaza (1975)	138								100% occupancy
$\begin{array}{cccccccccccccccccccccccccccccccccccc$			1br/1ba	\$664		700		\$0.95		
$\begin{array}{cccccccccccccccccccccccccccccccccccc$	0 5	1br				700			to	
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Prentis Estates (1990) 168 98% occupancy 1103 S. Latson 1br/1ba \$675 to 850 \$0.79 to Playground. \$730 2br/1ba \$800 to 950 to \$0.84 to		2br	/1ba TH	\$929	to	1,099	to	\$0.85	to	
1103 S. Latson 1br/1ba \$675 to 850 \$0.79 to Playground. \$730 \$0.86 2br/1ba \$800 to 950 to \$0.84 to				\$1,174		1,362		\$0.86		
1103 S. Latson 1br/1ba \$675 to 850 \$0.79 to Playground. \$730 \$0.86 2br/1ba \$800 to 950 to \$0.84 to	Prentis Estates (1990)	168								98% occupancy
\$730 \$0.86 2br/1ba \$800 to 950 to \$0.84 to			1br/1ba	\$675	to	850		\$0.79	to	
										20
			2br/1ba	\$800	to	950	to	\$0.84	to	
				\$965		965		\$1.00		

Summary Of Selected Rental Properties

Livingston County, Michigan

June, 2014

Property (Date Opened) Address	Number o <u>f Units</u>	Unit Type	Reported Base Rent	-	Reported Unit Size		Rent per Sq. Ft.	-	Additional Information	
Autress Howell {continued}										
Yorkshire Place (1991)	192								97% occupancy	
1504 Yorkshire Drive		1br/1ba	\$700	to	850		\$0.82	to	1 5	
			\$725				\$0.85			
		2br/1ba	\$785	to	950	to	\$0.80	to		
		01 /01	\$795		1,000		\$0.83			
		2br/2ba	\$810 \$830	to	950 1,000	to	\$0.83 \$0.85	to		
			1		,					
Lakeshore Village	240	41 / 41	☆□ 1 ○		000		#0.00		99% occupancy	
2812 Ontario Court		1br/1ba	\$719		800		\$0.90		Pool, sundeck,	
		2br/2ba 3br/2ba	\$839 \$840	to	1,050 1,250		\$0.80 \$0.68	ta	clubhouse, lounge,	
		5017 ZDa	\$849 \$959	to	1,250		\$0.08 \$0.77	10	playground, fitness center.	
			ψισι				ψ0.77		juness center.	
Preserve at Mallard Ponc	l 108								100% occupancy	
1575 Mallard Pond Drive		1br/1ba	\$735	to	814	to	\$0.90	to	1 1	
			\$875		917		\$0.95		sauna,	
	2bi	r/2ba TH	\$850		1,082		\$0.79		gathering room.	
		2br/2ba	\$875	to	1,116	to	\$0.74	to		
			\$1,200		1,619		\$0.78			
		3br/2ba	\$1,150		1,466		\$0.78			
Town Commons	100								98% occupancy	
1601 Town Commons Drive		1br/1ba	\$795		769		\$1.03		Park w/ pond.	
		2br/2ba	\$890	to	1,033	to	\$0.84	to	gazebo.	
			\$940		1,113		\$0.86			
	2	2br/2.5ba	\$1,065	to	1,269	to	\$0.78	to		
			\$1,165		1,500		\$0.84			
	ć	3br/2.5ba	\$1,340		1,519		\$0.88			
Burwick Farms	264								99% occupancy	
525 W. Highland Road		1br/1ba	\$855	to	860	to	\$0.99	to		
0			\$995		960		\$1.04		fitness center.	
		2br/2ba	\$980	to	1,075	to	\$0.90	to		
			\$1,055		1,175		\$0.91			
Glens at Rolling Ridge	200								98% occupancy	
998 Audrey Rae Lane		1br/1ba	\$875	to	745	to	\$1.17	to		
v			\$945		796		\$1.19		clubhouse, pool,	
		2br/2ba	\$935	to	967	to	\$0.97	to	,	
			\$1,045		1,042		\$1.00			

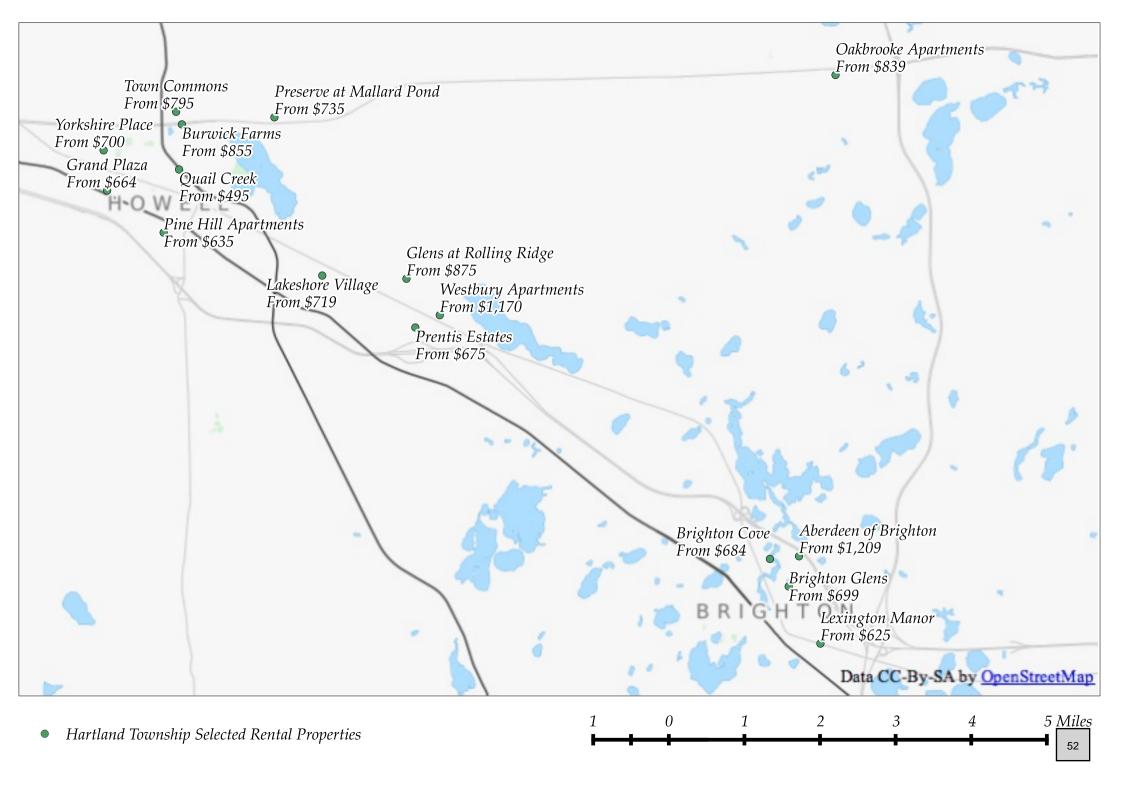
SOURCE: Zimmerman/Volk Associates, Inc.

Summary Of Selected Rental Properties

Livingston County, Michigan

June, 2014

Property Address	Number Unit o <u>f Units Type</u>	Reported Base Rent	- 	Reported Unit Size		Rent per Sq. Ft.	-	Additional Information			
Howell {continued}											
Westbury Apts. (2003)	131							98% occupancy			
1025 Westbury Boulevard	1br/1ba	\$1,170	to	961		\$1.22	to	Fitness center,			
		\$1,575				\$1.64		business center,			
	2br/2ba		to	1,253		\$1.15	to	0 ·			
		\$1,765				\$1.41		pool, sauna,			
	2br/2ba upper		to	1,331		\$1.12	to	,			
		\$2,095				\$1.57		tennis, playground.			
	3br/2ba		to	-	to	\$1.23	to				
		\$2,300		1,479		\$1.56					
		Brighton									
Lexington Manor	120							n/a			
898 East Grand River	1br/1ba	\$625	to	700		\$0.89	to				
	101/104	\$650		100		\$0.93					
	2br/1ba		to	800		\$0.91	to				
	~,	\$735				\$0.92					
Brighton Cove	180	* (0.4		(00				99% occupancy			
8699 Meadowbrook Drive	1br/1ba		to	600		\$1.14	to				
	01 / 41	\$694		000		\$1.16					
	2br/1ba		to	800		\$0.98	to				
	01 / 01	\$794		000		\$0.99					
	2br/2ba		to	800		\$1.07	to				
		\$864				\$1.08					
Brighton Glens	108							100% occupancy			
321 Williamson Drive	Studio/1ba	\$699		619		\$1.13		Pool.			
521 Williamson Drive	1br/1ba			830		\$0.88		1 001.			
	2br/1ba			1,034		\$0.80 \$0.82					
	2br/2ba			1,108		\$0.79					
	2017204	ψ075		1,100		ψ0.7 Σ					
Aberdeen											
of Brighton (2005)	90							99% occupancy			
4229 Deeside Drive	2br/2ba	\$1,209	to	1,149	to	\$0.98	to				
	,	\$1,489		1,525		\$1.05		0			
	3br/2ba		to		to	\$0.97	to				
	·	\$1,679		1,739		\$1.06					



Historically, condominium development (multi-family for-sale) has been very limited in Hartland Township. At the time of the survey, only three resale condominium units were on the market—a 780-square-foot two-bedroom/one-bath, and two 1,552-square-foot two-bedroom/two-bath apartments at Fawn Ridge, situated off Hartland Road. (*Reference* Table 5.) The asking price of the three units is \$89,500, \$138,000, and \$185,000, respectively (\$89 to \$119 per square foot). No units are currently for sale at the Fox Ridge Condominiums, located near the Kroger grocery store.

Several duplex and fourplex condominium projects are currently being developed elsewhere in Livingston County.

In Howell, two properties are marketing new units—Gallery Park on Brigg Street and Villas of Oceola on Vicksburg Way—and resale units are available at a third—Victoria Park. Base prices for the 19 two- and three-bedroom condominiums at Gallery Park range between \$169,900 and \$204,900 for units containing between 1,240 and 1,720 square feet (\$114 to \$137 per square foot).

At Pulte Homes' Villas of Osceola, base prices start at \$220,990 for the 47, 1,619- to 1701square-foot two- or three-bedroom/two-bath duplexes (\$130 to \$136 per square foot).

The three resale duplexes at Victoria Park—a three-bedroom/two-bath 2,056-square-foot unit; a two-bedroom/two-bath 1,704-square-foot unit, and a 2,164-square-foot four-bedroom/three-and-a-half bath unit—have asking prices of \$179,900, \$229,000, and \$259,000, respectively (\$88, \$134, and \$120 per square foot).

In Marion Township, 105 of the 147 duplex condominiums being developed by Mitch Harris Construction at The Meadows have been sold. Base prices range between \$195,900 and \$207,900 for the 1,516-square-foot two-bedroom/two-bath unit, and between \$189,900 and \$210,900 for the three-bedroom/two-bath unit containing 1,628 square feet (\$117 to \$137 per square foot range).

Mitch Harris Construction is also constructing fourplex condominiums in Genoa Township at Genoa Woods. To date, 21 of the 96 units have been sold, and base prices currently range between \$208,900 to \$224,900 for the 1,419- to 1,539-square-foot, two-bedroom/two-bath units (\$146 to \$147 per square foot).

The most expensive units included in the survey are the 14 duplexes located in the Town of Milford in Oakland County. That property, River Wood Estates, is marketing three-bedroom/two-and-a-half units containing approximately 2,400 square feet for a base price of \$349,000, or \$145 per square foot.

—SINGLE-FAMILY DETACHED FOR-SALE PROPERTIES—

Since the collapse of the housing market in 2008, no new subdivisions have begun marketing new single-family houses in Hartland Township. (*Reference* Table 6.) However, at the time of the survey, more than 60 single-family detached houses in the township had been listed for sale ranging in price from \$115,000 for a 756-square-foot two-bedroom/one-bath house on Mill Street (\$152 per square foot) to \$749,900 for a foreclosed 8,244-square-foot five-bedroom/five-and-a-half bath house on Hibner Road (\$91 per square foot). Almost 60 percent of the listed houses were priced between \$200,000 and \$300,000, with a unit size range of 832 to 3,440 square feet (in general, \$78 to \$263 per square foot), and contained three or four bedrooms. All but two of the houses priced above \$300,000 contained four bedrooms and, at minimum, two-and-a-half bathrooms.

Three properties are currently marketing new single-family detached houses in Howell and are included in this survey: Amber Oaks, Orchard Park Village, and Woods of Forest Ridge. Allen Edwin Homes has sold 10 houses at Amber Oaks, where base prices range from \$149,900 to \$269,900 for two- to four-bedroom houses containing between 1,458 and 3,420 square feet of living space (\$78 to \$161 per square foot).

At Orchard Park Village, Infinity Homes and Soave Homes are building two- to four-bedroom single-family houses containing 1,300 to 2,700 square feet, priced between \$158,900 and

\$236,890 (\$88 to \$122 per square foot). Sixty-one of the 140 houses planned for the property had been sold as of the time of the field investigation.

Ten houses have also been sold at the Woods of Forest Ridge, a property located on Silver Charm Lane and being developed by Lombardo Homes. The three- and four-bedroom houses are priced between \$210,900 and \$263,900 for units containing between 1,961 to 3,037 square feet of living space.

Mitch Harris Construction is also building detached houses at the 67-lot Amberley Woods in Oceola Township and at the 71-lot Irish Woods in Tyrone Township. Only two or three houses are built at a time, and the current unit available at Amberley Woods is priced at \$219,900 for a three-bedroom/two-and-a-half bath model with almost 1,600 square feet (139 per square foot).

Three units are currently being marketed at Irish Hills—a 1,708-square-foot, threebedroom/two-and-a-half bath model priced at \$249,900 (\$146 per square foot); a fourbedroom/three-and-a-half bath house priced at \$289,900 and containing 2,600 square feet (\$112 per square foot); and at \$299,900 the most expensive house currently marketed, a threebedroom/two-and-a-half bath unit with 1,927 square feet of living space (\$156 per square foot).

Selected For-Sale Multi-Family and Single-Family Attached Developments and Current Listings

Hartland Township Market Area, Michigan

June, 2014

Development Address/Developer Fawn Ridge	Unit Type Duplex	Beds/ Baths Hartland T	•	Unit Size Range sales	Price Per Sq. Ft.	Total Units n/a
Fawn Ridge Trail		2br/1ba 2br/2ba 2br/2ba	\$89,500 \$138,000 \$185,000	780 1,552 1,552	\$115 \$89 \$119	
		Hou	vell			
Gallery Park Brigg Street	СО	2br/2ba 3br/2ba	\$169,900 \$194,900 \$204,900	1,240 to 1,710 to 1,720	\$137 \$114 to \$119	19 listings
Victoria Park Victoria Park Circle	Duplex	3br/2ba 2br/2ba 4br/3.5ba	Re \$179,900 \$229,000 \$259,000	esales 2,056 1,704 2,164	\$88 \$134 \$120	n/a
Villas of Osceola 3920 Vicksburg Way Pulte Homes	Duplex	2br/2ba 3br/2ba Marian T	\$222,990 \$220,990	to 1,619 to 1,702 1,702	\$131 to \$136 \$130	47
771 b.c. 1		Marion T	ownsnip			
The Meadows Mitch Harris Construction	Duplex	2br/2ba	\$207,900	to 1,516	\$129 to \$137	147 105 sold
		3br/2ba	\$189,900 \$210,900	to 1,628	\$117 to \$130	
		Genoa To	wnship			
Genoa Woods Mitch Harris Construction	Fourplex	2br/2ba		to 1,419 to 1,539	\$146 to \$147	96 21 sold
	<i>T</i> a	own of Milford, (Oakland County	/		
River Wood Estates <i>River Wood Trail</i>	Duplex	3br/2.5ba	\$349,000	2,402	\$145	14

SOURCE: Multiple Listing Service,

Zimmerman/Volk Associates, Inc.

Selected For-Sale Single-Family Detached Current Listings and New Developments

Hartland Township Market Area, Michigan

June, 2014

	Unit	Beds/	Unit Price	Unit Size	Price Per	Lot
Development	Туре	Baths	Range	Range	Sq. Ft.	Size
Address						
		Hartland Tow	nship Resales	• •		
Mill Street	SF	2br/1ba	\$115,000	756	\$152	4,791 sf
Norway	SF	3br/2ba	\$126,000	1,392	\$91	condominium
Avon Street	SF	3br/1.5ba	\$139,899	1,716	\$82	condominium
Parkway Court	SF	3br/2ba	\$155,000	2,370	\$65	0.94 acres
Birch	SF	3br/1ba	\$155,000	1,200	\$129	condominium
Woodcliff Trail	SF	2br/2ba	\$172,500	1,840	\$94	condominium
Lakena Street	SF	3br/2ba	\$174,900	1,364	\$128	0.69 acres
Carlee June Drive	SF	3br/2ba	\$177,900	1,390	\$128	0.6 acres
Island Court	SF	3br/2ba	\$179,900	1,245	\$144	4,356 sf
Holtforth Road	SF	3br/1ba	\$200,000	1,062	\$188	10 acres
Andover Boulevard	SF	4br/2.5ba	\$209,900	1,832	\$115	n/a
Timbercreek Drive	SF	3br/2.5ba	\$209,900	2,637	\$80	condominium
East Peterson	SF	5br/3ba	\$214,000	2,112	\$101	9,583 sf
Maxfield Road	SF	2br/1ba	\$214,500	979	\$219	6,969 sf
Sylvan Drive	SF	2br/1ba	\$219,000	832	\$263	condominium
Glen Hills Drive	SF	4br/2.5ba	\$225,000	2,134	\$105	0.57 acres
Parshallville road	SF	4br/2ba	\$229,000	2,012	\$114	condominium
Bullard Road	SF	3br/1.5ba	\$230,000	1,824	\$126	0.48 acres
N. Tipsico Lake Road	SF	4br/3ba	\$230,000	2,510	\$92	0.8 acres
Carlee June Drive	SF	4br/2.5ba	\$232,900	2,036	\$114	0.56 acres
Anya Drive	SF	3br/2.5ba	\$238,000	1,989	\$120	n/a
Clyde Road	SF	4br/3.5ba	\$239,900	1,770	\$136	1.5 acres
Tipsico Lake Road	SF	4br/2.5ba	\$239,900	1,816	\$132	condominium
Long Lake Drive	SF	3br/3.5ba	\$239,930	1,786	\$134	0.73 acres
Lorraine Lane	SF	3br/2.5ba	\$254,900	1,900	\$134	0.33 acres
Windmill	SF	3br/2.5ba	\$257,500	1,754	\$147	condominium
Maxfield Boulevard	SF	3br/2.5ba	\$259,000	1,176	\$220	0.27 acres
Matthew Lane	SF	4br/2.5ba	\$259,900	2,094	\$124	n/a
Bergin Road	SF	4br/1.5ba	\$259,900	1,825	\$142	condominium
Windmill Lane	SF	3br/2.5ba	\$260,000	1,754	\$148	3 acres
Long Lake Drive	SF	4br/2.5ba	\$262,000	2,221	\$118	1.14 acres
Lyndenglen Court	SF	4br/2.5ba	\$262,900	2,400	\$110	condominium
Killarney Park Drive	SF	3br/2ba	\$265,000	2,050	\$129	condominium
Four Seasons Drive	SF	5br/3.5ba	\$267,000	2,898	\$92	condominium
Hearthstone Lane	SF	4br/2.5ba	\$267,500	2,551	\$105	1.04 acres
Clyde Road	SF	4br/2.5ba	\$268,500	3,440	\$78	condominium
Hartland Road	SF	4br/3.5ba	\$275,000	1,840	\$149	condominium
Courtney Court	SF	3br/2.5.5ba	\$279,900	2,053	\$136	n/a

SOURCE: Multiple Listing Service; Zimmerman/Volk Associates, Inc.

Selected For-Sale Single-Family Detached Current Listings and New Developments

Hartland Township Market Area, Michigan

June, 2014

Development Address	Unit Type	Beds/ Baths	Unit Price Range	Unit Size Range	Price Per Sq. Ft.	Lot Size
		Hartland Tow	nship Resales			
Maple Road	SF	3br/3ba	\$289,500	2,038	\$142	5.68 acres
Deer View Court	SF	4br/2.5ba	\$289,900	2,124	\$136	condominium
Blue Heron Drive	SF	3br/2.5ba	\$295,000	2,378	\$124	0.52 acres
Summerfield Lane	SF	4br/2.5ba	\$299 <i>,</i> 999	3,019	\$99	condominium
Mabley Hill Road	SF	3br/2ba	\$299 <i>,</i> 999	2,048	\$146	condominium
Killarney Park Drive	SF	3br/2.5ba	\$300,000	2,050	\$146	1 acre
Hartland Woods Drive	SF	3br/3ba	\$300,000	1,815	\$165	condominium
Long Lake Drive	SF	4br/3ba	\$320,000	2,570	\$125	condominium
Maria Court	SF	4br/3.5ba	\$324,900	3,304	\$98	condominium
Hibner Road	SF	4br/2.5ba	\$325,000	2,866	\$113	condominium
Maria Court	SF	4br/4.5ba	\$349,000	3,197	\$109	condominium
Bullard Road	SF	4br/3ba	\$356,000	2,003	\$178	15.01 acres
Lake Pines Drive	SF	4br/2.5ba	\$360,000	2,928	\$123	condominium
Dunham Road	SF	4br/3ba	\$360,000	2,112	\$170	condominium
Cattle Drive	SF	4br/2.5ba	\$397,000	2,003	\$198	2.4 acres
Hyde Road	SF	4br/3.5ba	\$425,000	2,982	\$143	condominium
Mystic Meadows Court	SF	3br/2.5ba	\$474,900	3,100	\$153	0.82 acres
Lake Pines Drive	SF	4br/3.5ba	\$550,000	3,582	\$154	1.16 acres
Long Lake Drive	SF	4br/2.5ba	\$569 <i>,</i> 900	2,748	\$207	0.87 acres
Blaime Road	SF	3br/3.5ba	\$574,900	2,300	\$250	0.7 acres
Clyde Road	SF	4br/2.5ba	\$575,000	4,027	\$143	condominium
Lake Pines Drive	SF	5br/5.5ba	\$649,900	2,465	\$264	1 acre
Blaime Road	SF	4br/4.5ba	\$724,900	3,404	\$213	0.9 acres
Hibner Road (foreclosure)	SF	5br/5.5ba	\$749,900	8,244	\$91	5.22 acres
62 properties		Average:	\$300,447	2,256	\$133	

Selected For-Sale Single-Family Detached Current Listings and New Developments

Hartland Township Market Area, Michigan

June, 2014

Development Address/Developer	Unit Type	Beds/ Baths	Unit Price Range		Unit Size Range	Price Per Sq. Ft.	_	Total Units
11uuress, Developer		Hou	vell					
Amber Oaks	SF							n/a
Amber Oaks Drive Allen Edwin Homes	01	3br/2ba	\$149,900 \$234,900	to	1,458 t 2,780	to \$103 \$161	to	10 sold
		2br/2ba	\$203,900	to	1,658	\$123		
		4br/2ba	\$240,900 \$269,900	to	3,070 t 3,420	xo \$78 \$88	to	
Orchard Park Village	SF							140
Orchard Park Boulevard		2br/2ba	\$158,990		1,300	\$122		61 sold
Infinity Homes/Soave Homes		to	\$161,490		1,400	\$115		(Phases 1&2)
		4br/2.5ba	\$171,890		1,500	\$115		
			\$188,790		1,825	\$103		
			\$188,990		1,700	\$111		
			\$217,990		2,320	\$94		
			\$236,890		2,700	\$88		
Woods of Forest Ridge	SF							n/a
Silver Charm Lane	01	3br/3ba	\$210,900	to	1,961 t	to \$108	to	10 sold
Lombardo Homes		,	\$242,000		2,234	\$123		
		4br/3ba	\$224,900	to	2,312 t	o \$97	to	
			\$263,900		3,037	\$114		
		Oceola To	ownship					
Amberley Woods	SF		Current A	Aziaila	nhlø Hnite			67
Mitch Harris Construction	51	3br/2.5ba	\$219,900	101111	1,585	\$139		07
		Tyrone To	ownship					
Irish Hills	SF		Current A	Vaile	able Units			71
Mitch Harris Construction	01	3br/2.5ba	\$249,900		1,708	\$146		<i>'</i> -
		4br/3.5ba	\$289,900		2,600	\$110 \$112		
		3br/2.5ba	\$299,900		1,927	\$156		
		,	, ,		,	,		

OPTIMUM MARKET POSITION

The rents and price points for new market-rate housing units that could be developed in Hartland Township are derived from the income and financial capabilities of those households in groups with incomes above \$50,000 that have been identified as the target markets for new housing in the township.

-Rental Distribution by Rent Range-

Based on the <u>incomes</u> and <u>assets</u> of the 380 households that represent the target markets for new market-rate rental units in Hartland Township (reference Table 7), the distribution of annual market potential by rent range would be summarized as follows:

Distribution by Rent Range Target Groups for New Multi-Family For Rent Hartland Township, Livingston County, Michigan

Monthly Rent Range	Units Per Year	Percentage
\$750-\$1,000	85	22.4%
\$1,000-\$1,250	110	28.9%
\$1,250-\$1,500	80	21.1%
\$1,500-\$1,750	45	11.8%
\$1,750-\$2,000	35	9.2%
\$2,000 and up	_25	<u> 6.6</u> %
Total:	380	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2014.

• Empty nesters and retirees represent just over 13 percent of the market for new market-rate rental units, and 40 percent of them could pay rents no greater than \$1,250 per month. Forty percent of this market segment are able to afford rents between \$1,250 and \$1,750 per month. The remaining 20 percent represent the market for new units with rents above \$1,750 per month.

Target Groups For New Multi-Family For-Rent Households In Groups With Median Incomes Above \$50,000

Hartland Township

Livingston County, Michigan

Empty Nesters & Retirees	Number of Households	Share of Households
Small-Town Establishment	5	1.3%
New Empty Nesters	10	2.6%
RV Retirees	5	1.3%
Blue-Collar Empty Nesters	15	3.9%
Middle-Class Move-Downs	5	1.3%
No-Nest Suburbanites	5	1.3%
Exurban Suburbanites	5	1.3%
Subtotal:	50	13.2%
Traditional & Non-Traditional Families		
	10	2 601
Ex-Urban Elite Unibox Transferees	10	2.6%
Full-Nest Exurbanites	5	1.3% 1.2%
Full-Nest Exurbanites	5 5	1.3% 1.2%
		1.3% 1.2%
Full-Nest Urbanites	5 30	1.3% 7.0%
New-Town Families Small-Town Families		7.9%
Multi-Ethnic Families	10 5	2.6% 1.3%
Blue-Collar Button-Downs	5	1.3%
Multi-Cultural Families	20	5.3%
Subtotal:	100	26.3%
Subtotai.	100	20.070
Younger Singles & Couples		
e-Types	5	1.3%
Ex-Urban Power Couples	15	3.9%
The VIPs	10	2.6%
Fast-Track Professionals	5	1.3%
Upscale Suburban Couples	10	2.6%
Cross-Training Couples	35	9.2%
New Bohemians	10	2.6%
Twentysomethings	25	6.6%
Suburban Achievers	45	11.8%
Small-City Singles	40	10.5%
Urban Achievers	30	7.9%
Subtotal:	230	60.5%
Total Households:	380	100.0%

SOURCE: The Nielsen Company;

Zimmerman/Volk Associates, Inc.

- Traditional and non-traditional families comprise 26.3 percent of the market for new market-rate rental units. Again, 40 percent would require rents below \$1,250 per month; 35 percent could afford rents between \$1,250 and \$1,750 per month, and a quarter of the family households can afford rents above \$1,750 per month.
- The largest group of renters are younger singles and couples at 60.5 percent of the market. Just under 11 percent would be able to afford rents at or above \$1,750 per month, over 30 percent of these households represent the market for units with rents between \$1,250 and \$1,750 per month; and just under 59 percent would require rents below \$1,250 per month.

—For-Sale Distribution by Price Range—

The realization of the full market potential for ownership units may continue to be challenging over the short-term, given restrictive mortgage underwriting by financial institutions, the disinterest on the part of many younger households in becoming owners, the fact that many otherwise-qualified households, particularly current renters, lack the funds for a down payment, and the inability of many owner households to sell their existing single-family houses, or their reluctance to sell at a perceived loss of value.

Based on the <u>incomes</u> and <u>assets</u> of the 140 households (*as shown on* Table 8) that represent the target markets for new market-rate multi-family for-sale (condominium) units, the distribution of annual market potential by price range is summarized on the following table:

Distribution by Price Range Target Groups for New Multi-Family For Sale Hartland Township, Livingston County, Michigan

Price	Households	
Range	PER YEAR	Percentage
\$150,000-\$200,000	40	28.6%
\$200,000-\$250,000	35	25.0%
\$250,000-\$300,000	35	25.0%
\$300,000-\$350,000	20	14.3%
\$350,000 and up	10	<u>7.1</u> %
Total:	140	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2014.

Target Groups For New Multi-Family For-Sale Households In Groups With Median Incomes Above \$50,000

Hartland Township

Livingston County, Michigan

Empty Nesters & Retirees	Number of Households	Share of Households
Urban Establishment	5	3.6%
Small-Town Establishment	5	3.6%
Cosmopolitan Elite	5	3.6%
New Empty Nesters	5	3.6%
Affluent Empty Nesters	5	3.6%
Subtotal:	25	17.9%
Traditional & Non-Traditional Families		
Full-Nest Urbanites	5	3.6%
New-Town Families	10	7.1%
Multi-Ethnic Families	5	3.6%
Subtotal:	20	14.3%
Younger Singles & Couples		
The Entrepreneurs	5	3.6%
e-Types	5	3.6%
Ex-Urban Power Couples	10	7.1%
The VIPs	10	7.1%
Fast-Track Professionals	10	7.1%
Upscale Suburban Couples	10	7.1%
Cross-Training Couples	10	7.1%
New Bohemians	5	3.6%
Twentysomethings	5	3.6%
Suburban Achievers	10	7.1%
Small-City Singles	10	7.1%
Urban Achievers	5	3.6%
Subtotal:	95	67.9%
Total Households:	140	100.0%

- Younger singles and couples are also the largest segment of the market for new multifamily for-sale units (condominiums), at just under 68 percent of the market. However, only 21 percent would be able to purchase a new condominium with base prices at or above \$300,000, and 21 percent would only be able to afford a unit priced between \$250,000 and \$300,000. The heart of this segment—58 percent are younger households with the capacity to purchase condominiums priced between \$150,000 and \$250,000.
- At almost 18 percent, empty nesters and retirees represent the next largest segment of the market for new multi-family for-sale units; 40 percent would be in the market for new condominiums with base prices at or above \$300,000, and the remaining 60 percent could afford condominiums priced between \$250,000 and \$300,000.
- The smallest group, traditional and non-traditional families, comprise just 14.3 percent of the market for this housing type. All of them would be limited to condominium units priced under \$250,000.

The Hartland Township market for new townhouses is slightly larger than the size of the market for new condominiums, even though, as a housing type, neither have been developed to any significant extent within the township. Based on the <u>incomes</u> and <u>assets</u> of the 150 households (*as shown on* Table 9) that represent the target markets for new market-rate single-family attached for-sale (townhouse) units, the distribution of annual market potential by price range would be summarized as follows:

Distribution by Price Range Target Groups for New Single-Family Attached For Sale Hartland Township, Livingston County, Michigan

Price Range	Households Per Year	Percentage
\$150,000-\$200,000	45	30.1%
\$200,000-\$250,000	35	23.3%
\$250,000-\$300,000	20	13.3%
\$300,000-\$350,000	20	13.3%
\$350,000-\$400,000	15	10.0%
\$400,000 and up	15	10.0%
Total:	150	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2014.

Target Groups For New Single-Family Attached For-Sale Households in Groups With Median Annual Incomes Above \$50,000

Hartland Township

Livingston County, Michigan

Empty Nesters & Retirees	Number of Households	Share of Households
New Empty Nesters	5	3.3%
Blue-Collar Empty Nesters	5	3.3%
Middle-Class Move-Downs	5	3.3%
No-Nest Suburbanites	5	3.3%
Exurban Suburbanites	5	3.3%
Subtotal:	25	16.7%
Traditional & Non-Traditional Families		
Ex-Urban Elite	15	10.0%
Full-Nest Exurbanites	5	3.3%
Full-Nest Urbanites	5	3.3%
New-Town Families	10	6.7%
Multi-Ethnic Families	5	3.3%
Blue-Collar Button-Downs	5	3.3%
Multi-Cultural Families	10	6.7%
Subtotal:	55	36.7%
Younger Singles & Couples		
The Entrepreneurs	5	3.3%
Ex-Urban Power Couples	10	6.7%
The VIPs	5	3.3%
Fast-Track Professionals	5	3.3%
Upscale Suburban Couples	5	3.3%
Cross-Training Couples	15	10.0%
Twentysomethings	5	3.3%
Suburban Achievers	10	6.7%
Small-City Singles	10	6.7%
Subtotal:	70	46.7%
Total Households:	150	100.0%

- Younger singles and couples are the largest market segment, just under 47 percent of the market for new single-family attached for-sale units (townhouses). Just 21 percent would be able to purchase a new townhouse with base prices at or above \$350,000, 43 percent would be able to afford a unit priced between \$200,000 and \$350,000, and 36 percent could afford a new townhouse priced below \$200,000.
- At just under 37 percent, traditional and non-traditional families comprise the next largest segment of the market for new single-family attached for-sale units; slightly over 18 percent would be in the market for new townhouses with base prices above \$400,000. Only nine percent would be able to purchase a new townhouse with a base price above \$200,000, whereas more than a quarter would require units priced between \$125,000 and \$200,000.
- Empty nesters and retirees represent just under 17 percent of the market for new townhouses, of which 20 percent would be able to purchase units priced between \$250,000 and \$300,000, 40 percent could afford units priced between \$200,000 and \$250,000, and 40 percent could only afford townhouses priced below \$200,000.

Over the next five years, there continues to be a solid market for new detached houses in Hartland Township. Based on the <u>incomes</u> and <u>assets</u> of the 230 households (*as shown on* Table 10) that represent the target markets for new market-rate for-sale low-range single-family detached houses, the distribution of annual market potential by price range would be as follows:

Distribution by Price Range Target Groups for New Low-Range Single-Family Detached For Sale Hartland Township, Livingston County, Michigan

Price Range	Households Per Year	Percentage
\$150,000-\$200,000	25	30.1%
\$200,000-\$250,000	70	23.3%
\$250,000-\$300,000	50	13.3%
\$300,000-\$350,000	30	13.3%
\$350,000-\$400,000	30	10.0%
\$400,000 and up	20	<u>10.0</u> %
Total:	230	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2014.

Target Groups For New Low-Range Single-Family Detached For-Sale Households in Groups With Median Annual Incomes Above \$50,000

Hartland Township

Livingston County, Michigan

Empty Nesters & Retirees	Number of Households	Share of Households
New Empty Nesters	10	4.3%
RV Retirees	10	4.3%
Blue-Collar Empty Nesters	25	10.9%
Middle-Class Move-Downs	5	2.2%
No-Nest Suburbanites	5	2.2%
Exurban Suburbanites	10	4.3%
Subtotal:	65	28.3%
Traditional & Non-Traditional Families		
Ex-Urban Elite	20	8.7%
Full-Nest Exurbanites	10	4.3%
New-Town Families	30	13.0%
Small-Town Families	20	8.7%
Blue-Collar Button-Downs	5	2.2%
Multi-Cultural Families	5	2.2%
Subtotal:	90	39.1%
Younger Singles & Couples		
Ex-Urban Power Couples	15	6.5%
The VIPs	5	2.2%
Cross-Training Couples	40	17.4%
Twentysomethings	5	2.2%
Suburban Achievers	5	2.2%
Small-City Singles	5	2.2%
Subtotal:	75	32.6%
Total Households:	230	100.0%

- At over 39 percent of the annual market, family-oriented households represent the largest market segment for new low-range detached houses. A third could pay base prices of \$350,000 or more, a third would be able to purchase houses priced between \$200,000 and \$350,000, and the remaining third could only afford new detached houses priced between \$150,000 and \$200,000.
- Younger singles and couples comprise just under a third of the market for new lowrange single-family detached for-sale units; a third of these would be in the market for village houses with base prices at \$350,000 and up. Another third would only be able to purchase a new house with a base price of less than \$250,000, and the remaining third could purchase new units priced between \$250,000 and \$350,000.
- In this case, empty nesters and retirees are the smallest market segment, representing just over 28 percent of the market for new low-range single-family detached for-sale units. Nearly 70 percent of this market would be able to purchase a new house with base prices between \$200,000 and \$300,000, 15 percent would be able to afford a unit priced above \$300,000, and 15 percent could only afford houses priced between \$150,000 and \$200,000.

Based on the <u>incomes</u> and <u>assets</u> of the 210 households (*as shown on* Table 11) that represent the target markets for new market-rate for-sale mid-range single-family detached houses, the distribution of annual market potential by price range would be summarized as follows:

Distribution by Price Range Target Groups for New Mid-Range Single-Family Detached For Sale Hartland Township, Livingston County, Michigan

Price Range	Households Per Year	Percentage
\$200,000-\$250,000	30	14.3%
\$250,000-\$300,000	50	23.8%
\$300,000-\$350,000	35	16.7%
\$350,000-\$400,000	30	14.3%
\$400,000-\$450,000	25	11.9%
\$450,000-\$500,000	25	11.9%
\$500,000 and up	15	7.1%
Total:	210	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2014.

Target Groups For New Mid-Range Single-Family Detached For-Sale Households in Groups With Median Annual Incomes Above \$50,000

Hartland Township

Livingston County, Michigan

Empty Nesters & Retirees	Number of Households	Share of Households
Small-Town Establishment	5	2.4%
New Empty Nesters	10	4.8%
RV Retirees	5	2.4%
Blue-Collar Empty Nesters	15	7.1%
Exurban Suburbanites	5	2.4%
Subtotal:	40	19.0%
Traditional & Non-Traditional Families		
Nouveau Money	5	2.4%
Ex-Urban Elite	25	11.9%
Unibox Transferees	5	2.4%
Full-Nest Exurbanites	10	4.8%
Full-Nest Suburbanites	5	2.4%
New-Town Families	30	14.3%
Small-Town Families	15	7.1%
Blue-Collar Button-Downs	5	2.4%
Multi-Cultural Families	5	2.4%
Subtotal:	105	50.0%
Younger Singles & Couples		
Ex-Urban Power Couples	20	9.5%
Upscale Suburban Couples	5	2.4%
Cross-Training Couples	30	14.3%
Suburban Achievers	5	2.4%
Small-City Singles	5	2.4%
Subtotal:	65	31.0%
Total Households:	210	100.0%

- Family-oriented households comprise half the market for new mid-range detached houses. Just under 29 percent could afford base prices of \$450,000 or more, another 38 percent would be able to purchase only those houses priced below \$300,000, and a third of the family market could afford new detached houses priced between \$300,000 and \$450,000.
- More affluent younger singles and couples represent 31 percent of the market for new mid-range single-family detached for-sale units. Thirty percent of these households would be in the market for houses with base prices of \$400,000 to \$500,000. Another 30 percent would only be able to purchase a new house with a base price of less than \$300,000, and the remaining 40 percent could purchase new units priced between \$300,000 and \$400,000.
- Empty nesters and retirees are again the smallest market segment, making up just 19 percent of the market for new mid-range single-family detached houses. Half of this older market could purchase a new house with base prices between \$200,000 and \$300,000, 37.5 percent could afford a unit priced between \$300,000 and \$400,000, and just 12.5 percent could afford houses priced between \$400,000 and \$450,000.

Finally, based on the <u>incomes</u> and <u>assets</u> of the 150 households (*as shown on* Table 12) that represent the target markets for new market-rate for-sale high-range single-family detached houses, the distribution of annual market potential by price range would be as follows:

Distribution by Price Range Target Groups for New High-Range Single-Family Detached For Sale Hartland Township, Livingston County, Michigan

Price Range	Households Per Year	Percentage
\$300,000-\$350,000	20	13.3%
\$350,000-\$400,000	20	13.3%
\$400,000-\$450,000	30	20.0%
\$450,000-\$500,000	25	16.7%
\$500,000-\$550,000	25	16.7%
\$550,000 and up	30	20.0%
Total:	150	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2014.

Target Groups For New High-Range Single-Family Detached For-Sale Households in Groups With Median Annual Incomes Above \$50,000

Hartland Township

Livingston County, Michigan

Empty Nesters & Retirees	Number of Households	Share of Households
Small-Town Establishment	5	3.3%
New Empty Nesters	5	3.3%
RV Retirees	5	3.3%
Blue-Collar Empty Nesters	5	3.3%
Subtotal:	20	13.3%
Traditional & Non-Traditional Families		
	_	2.201
Nouveau Money	5	3.3%
Ex-Urban Elite	45	30.0%
Unibox Transferees	5	3.3%
Full-Nest Exurbanites	10	6.7%
Full-Nest Suburbanites New-Town Families	5	3.3%
Small-Town Families	15 5	10.0% 3.3%
Sinaii-10wit Faitures		5.5/0
Subtotal:	90	60.0%
Younger Singles & Couples		
Ex-Urban Power Couples	20	13.3%
Upscale Suburban Couples	5	3.3%
Cross-Training Couples	15	10.0%
Subtotal:	40	26.7%
Total Households:	150	100.0%

Hartland Township Livingston County, Michigan

August, 2014

- ٠ Traditional and non-traditional families are the largest market segment for new highrange detached houses, at 60 percent of the potential market. Half of them have the financial capability to purchase new high-range houses with base prices of \$500,000 or more, a third would be able to purchase houses priced between \$400,000 and \$500,000, and the remaining 17 percent could afford new detached houses priced between \$300,000 and \$400,000.
- Three target groups of well-to-do younger singles and couples comprise just under 27 percent of the market for new high-range single-family detached for-sale units; half of these households would be in the market for houses with base prices between \$450,000 and \$550, and the other half could purchase new units priced between \$350,000 and \$450,000.
- Again, empty nesters and retirees are the smallest market segment, representing just over 13 percent of the market for new high-range single-family detached for-sale units. Three-quarters of this market would be able to purchase a new house with base prices between \$300,000 and \$400,000, and 25 percent have the financial capability to purchase houses priced between \$400,000 and \$450,000.

-HARTLAND TOWNSHIP ASSETS AND CHALLENGES-

From a market perspective, the assets of Hartland Township are considerable, including:

- Location and Access: U.S. Route 23 provides easy access by automobile to employment and shopping in the Cities of Brighton and Ann Arbor to the south. The amenities of the City of Howell are also a short distance away via M-59, Highland Road.
- Architecturally and historically significant buildings in Historic buildings: Hartland Village provide a historic identity for the township.
- Culture: Although Hartland Township does not have a large population, the township contains several cultural institutions. The Hartland Players perform a variety of programs at the Hartland Music Hall on Avon Street in Hartland Village, and the Hartland Performing Arts Center on Highland Road provides a

wide range of performances, including the annual Bled Fest. The Florence B. Dearing Museum, located in the former Hartland town hall at the intersection of Hartland and Crouse Roads, features exhibits from the township's history.

- Public schools: The Hartland Consolidated School District is highly rated. Based on test results, Hartland High School has a GreatSchools rating of 10 out of 10, and the Hartland Village Elementary School has a rating of 9. The overall school district has a rating of 8 out of 10.
- Parks and recreation: Three golf courses, four parks, and multiple lakes provide a variety of recreational activities for township residents.

From a market perspective, the major limiting factor to new development in Hartland Township is lack of sufficient infrastructure.

- Of the 104 miles of public roads in the township under the aegis of Livingston County, 37 are unpaved, as are numerous private roads, making new construction beyond a single house very difficult. The township has convened a Safer Roads and Pathways Task Force to address this issue.
- Most of the township does not have access to public water and sewer, limiting the areas where residential development other than single-family detached houses with individual wells and septic systems can be constructed.

-OPTIMUM MARKET POSITION-

As established above under MARKET POTENTIAL FOR HARTLAND TOWNSHIP, based on the housing preferences of the 1,260 households in groups with median incomes above \$50,000 that represent the market for new housing units in Hartland Township, the overall target mix of new units should include approximately 30.1 percent multi-family for-rent (380 households); and just under 70 percent for-sale housing units (880 households), which includes multi-family for-sale (140 households, 11.1 percent of the total), single-family attached for-sale (150 households, 11.9 percent), and single-family detached for-sale (590 households, 46.9 percent of the total).

The target residential mix of 500 new dwelling units, based on the housing preferences of the identified target household groups, would be as follows (*reference again* Table 2):

Target Residential Mix-500 New Residential Units Hartland Township, Livingston County, Michigan

Housing Type	Percent of Total	Number of Units
Multi-Family For-Rent (lofts/apartments)	30.1%	150
Multi-Family For-Sale (lofts/apartments, condo/co-op ownership)	11.1%	56
Single-Family Attached For-Sale (townhouses, fee-simple/ condominium ownership)	11.9%	60
Low-Range Single-Family Detached For-Sale (village houses, fee simple ownership)	18.3%	91
Mid-Range Single-Family Detached For-Sale (neighborhood houses, fee simple ownership)	16.7%	83
High-Range For-Sale Single-Family Detached (estate houses, fee simple ownership)	11.9%	60
Total	100.0%	500

SOURCE: Zimmerman/Volk Associates, Inc., 2014.

Three promising areas within the township, and the recommended housing types for each area, have been identified as preferred potential locations for new development because there is access to infrastructure and they have access to paved roads.

- The intersection of Highland Road with Fenton/North Pleasant Valley Roads, where the township owns two sizable parcels—mixed-use, multi-family and single-family attached housing types;
- The area east of the Hartland High School, Hartland Middle School, and the Creekside Elementary School, south of the Village Elementary School, and north of Dunham Road—village-scale single-family housing types; and
- The intersection of U.S. Route 23 and Clyde Road—multi-family and single-family attached housing types.

Given lack of infrastructure and current zoning, most of the remaining undeveloped areas of the township are appropriate only for single-family development on larger lots.

The optimum market position for new market-rate housing units has therefore been established for Hartland Township in general and the three areas in specific based on a variety of factors, including but not limited to:

- The tenure and housing preferences of draw area households and their income and equity levels;
- The township's physical and locational assets and challenges; and
- Current residential market dynamics in the Hartland market area.

Based on the above, the optimum market position for new rental and for-sale housing within the township and the three identified areas is summarized on the table on the following page (*see also* Table 13 *for further detail*):

Base Rent, Price and Size Ranges New Housing Units Hartland Township, Livingston County, Michigan

Housing Type	Rent/Price Range	Size Range	Rent/Price Per Sq. Ft.
For-Rent (Multi-Fam	IILY)—		
Apartment Flats	\$850–\$1,500/month	600–1,250 sf	\$1.20-\$1.42 psf
For-Sale (Multi-Fami	ILY)—		
Condominium Flats	\$150,000-\$265,000	900–1,650 sf	\$161–\$167 psf
For-Sale (Single-Fam	ily Attached)—		
Townhouses	\$185,000-\$300,000	1,150–2,000 sf	\$150–\$161 psf
For-Sale (Single-Fam	ily Detached)—		
Village Houses	\$195,000-\$285,000	1,200–1,800 sf	\$158–\$163 psf
Neighborhood Houses	\$295,000-\$375,000	1,850–2,500 sf	\$150–\$159 psf
Estate Houses	\$400,000-\$500,000	2,550–3,300 sf	\$152–\$157 psf

SOURCE: Zimmerman/Volk Associates, Inc., 2014.

Base prices are <u>exclusive of consumer-added options</u>, <u>upgrades</u>, and/or <u>lot or view premiums</u>, and have been established in year 2014 dollars to place the units within the current purchasing capabilities of the target market households.

Table 13

Optimum Market Position: 500 Dwelling Units New Residential Development

Hartland Township, Livingston County, Michigan

August, 2014

Percent of Units	Housing Type	Unit Configuration	Approx. Rent/Price Range	Approx. Unit Size Range	Approx. Rent/Price Per Sq. Ft.	Annualized Average Absorption
30.1%	Multi-Fami	ly For-Rent				60
150	Flats	Studio/1ba 1br/1ba 2br/2ba 3br/2.5ba	\$850 \$975 \$1,250 \$1,500	600 750 1,000 1,250	\$1.42 \$1.30 \$1.25 \$1.20	60
11.1%	Multi-Fami	ly For-Sale				12
56	Flats (4-unit buildings)	1br/1ba 2br/2ba 2br/2.5ba 3br/5ba	\$150,000 \$205,000 \$230,000 \$265,000	900 1,250 1,400 1,650	\$167 \$164 \$164 \$161	12
11.9%	Single-Fam	ily Attached For	Sale			12
60	Townhouses	2br/1.5ba 2br/2.5ba 3br/2.5ba 3br/2.5ba end unit	\$185,000 \$235,000 \$270,000 \$300,000	1,150 1,500 1,750 2,000	\$161 \$157 \$154 \$150	12
18.3%	Low-Range	Single-Family D	Oetached For	-Sale		16
91	Village Houses	2br/2ba 2br/2.5ba 3br/2ba 3br/2ba	\$195,000 \$215,000 \$255,000 \$285,000	1,200 1,350 1,600 1,800	\$163 \$159 \$159 \$158	16

NOTE: Base rents/prices are in year 2014 dollars, do not include premiums, options or upgrades.

SOURCE: Zimmerman/Volk Associates, Inc.

Table 13

Optimum Market Position: 500 Dwelling Units New Residential Development

Hartland Township, Livingston County, Michigan August, 2014

Percent of Units 16.7%	<u>Housing Type</u> Mid-Range	Unit <u>Configuration</u> Single-Family D	Approx. Rent/Price Range Detached For	Approx. Unit Size Range -Sale	Approx. Rent/Price Per Sq. Ft.	Annualized Average Absorption 14
83	Neighborhood Houses	3br/2ba 3br/2.5ba 3br/2ba/family rm 4br/2.5ba/den	\$295,000 \$325,000 \$350,000 \$375,000	1,850 2,100 2,300 2,500	\$159 \$155 \$152 \$150	14
11.9%	High-Range	e Single-Family	Detached Fo	r-Sale		10
60	Estate Houses	4br/2.5ba 4br/2.5ba/family 4br/3ba/den 4br/3.5ba/library	\$400,000 \$435,000 \$475,000 \$500,000	2,550 2,800 3,100 3,300	\$157 \$155 \$153 \$152	10
100.0%					inc	124 luding rentals

500 Dwelling Units

64 excluding rentals

NOTE: Base rents/prices are in year 2014 dollars, do not include premiums, options or upgrades.

-Building and In-Unit Amenities-

Building façades should reflect traditional proportions and designs, such as shutters scaled to match windows, and single-height entries. Traditional elevations are typically more efficient to build, since they do not require any articulation other than a portico or porch. Brick or stucco façades should be encouraged, with fiber-cement side and rear elevations.

To meet the expectations of potential residents, all units should be wired for cable television and high-speed internet. Lighting fixtures should be capable of accommodating compact fluorescent or LED bulbs.

Rental units should incorporate contemporary, durable finishes appropriate to urban living, as opposed to the "beige" interiors of suburban multi-family housing. Smaller apartments should be designed without interior walls, with the exception of the bathroom, and as much closet and storage space as possible. Larger apartments should include individual bedrooms.

In the kitchens of the for-sale apartments, countertops should be a durable, non-traditional material, with integral or undermount sinks, mid-scale appliances, and plain-front Europeanstyle cabinetry. Bathrooms should have a standard contemporary finish package, including vessel-style sinks, and shower and/or tub enclosures. All fixtures, faucets and lighting should be clean, minimalist and contemporary.

The townhouses and detached houses should provide a choice of traditional finishes (such as crown molding, chair rails, five-panel interior doors) or modern minimal finishes (wood flatpanel doors, stainless hardware, etc.). These units should have carpeted bedroom floors, carpet or hardwood in living and dining areas and tile in the kitchens and baths. Kitchen countertops should be hard surface or, at minimum, color-through laminate, with integral or undermount stainless sinks and appliances and a choice of European or traditional cabinets. Bathrooms should have ceramic tile floors and traditional fixtures.

-ABSORPTION FORECASTS-

Absorption of up to 500 new dwelling units in Hartland Township could be achieved within six years from commencement of marketing, depending on phasing and construction, and barring another extended downturn in the national and regional economies over the next several years. Pricing and positioning have been designed to maximize values and the potential for escalation, yet achieve sell-out within a reasonable absorption period.

After more than 26 years' experience in various markets across the country, and in the context of the target market methodology, Zimmerman/Volk Associates has determined that an annual capture of up to 20 percent of the potential market for new rental housing and up to 10 percent of the potential market for each for-sale housing type is achievable. (Nationally, until the recent housing collapse, newly-constructed dwelling units represented 15 percent of all units sold.)

Annual absorption forecasts are summarized on the following table (see again Table 13):

Average Annual Absorption New Housing Units Hartland Township, Livingston County, Michigan

Multi-family for-rent Apartment flats	60 units
Multi-family for-sale Condominium flats	12 units
Single-family attached for-sale Townhouses (fee simple)	12 units
Low-range single-family detached for-sale Village houses	16 units
Mid-range single-family detached for-sale Neighborhood houses	14 units
High-range single-family detached for-sale Estate houses	<u>10</u> units
Total	124 units

SOURCE: Zimmerman/Volk Associates, Inc., 2014.

At the forecast absorption of an average 124 rental and for-sale units per year, new residential development within Hartland Township would require a capture rate of 9.8 percent of the 1,260 households—identified through target market analysis—that have the potential to rent or purchase new housing units each year over the next five years—a rate that is well within the target market methodology's parameters of feasibility.

The annual absorption forecasts indicate the specific capture rates of those households that represent the potential market for each housing type within Hartland Township, as shown on the following table:

Capture of the Potential Market Based on Absorption Forecasts New Housing Units Hartland Township, Livingston County, Michigan

Housing Type	Annual Market Potential (HHs)	Average Annual Absorption (Units)	Capture Rate
Multi-family for-rent	380	60	15.8%
Multi-family for-sale	140	12	8.6%
Single-family attached for-sale	150	12	8.0%
Low-range single-family detached for-sale	230	16	7.0%
Mid-range single-family detached for-sale	210	14	6.7%
High-range single-family detached for-sale	150	10	6.7%

SOURCE: Zimmerman/Volk Associates, Inc., 2014.

These housing type-specific capture rates are well within the parameters required for feasible development. For a study area of this size and scale, there is a high degree of confidence in a capture rate of up to 20 percent for new multi-family rental development and up to 10 percent for new multi-family and single-family attached and detached for-sale development.

NOTE: The target market capture rates of the potential purchaser or renter pool are a unique and highly-refined measure of feasibility. Target market capture rates are *not* equivalent to—and should not be confused with—penetration rates or traffic conversion rates.

The target market capture rate represents the *annual* forecast absorption in aggregate and by housing type—as a percentage of the number of households that have the potential to purchase or rent new housing within a specified area *in a given year*.

The **penetration rate** represents the *total* number of dwelling units planned for a property as a percentage of the *total* number of draw area households, sometimes qualified by income.

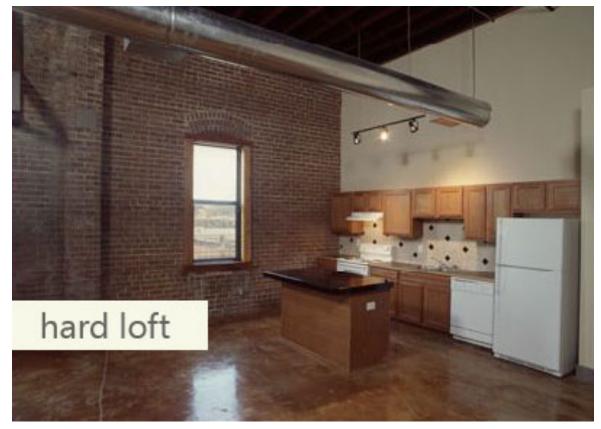
The **traffic conversion rate** represents the *total* number of buyers or renters as a percentage of the *total* number of prospects that have visited a site.

Because the prospective market for a property is more precisely defined using target market methodology, a substantially smaller number of households are qualified; as a result, target market capture rates are higher than the more grossly-derived penetration rates. The resulting higher capture rates remain within the range of feasibility.

UNIT AND BUILDING TYPES

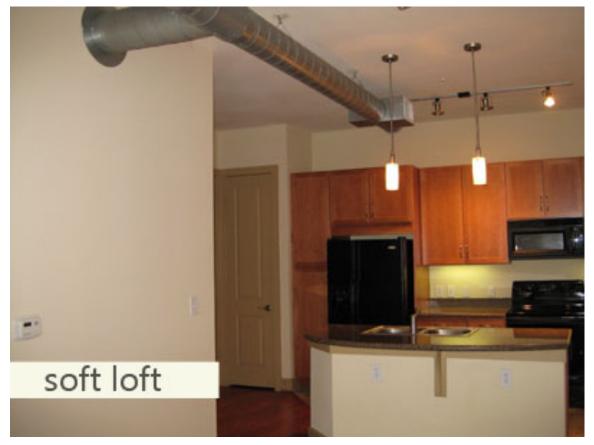
Unit and building types that are attractive to today's market include:

• <u>Open Loft</u>: Unit interiors typically have high ceilings and commercial windows and are minimally finished (with minimal room delineations such as columns and fin walls), or unfinished (with no interior partitions except those for bathrooms).



Open Loft

• <u>Soft Loft</u>: Unit interiors typically have high ceilings, are fully finished and partitioned into individual rooms. Units may also contain architectural elements reminiscent of "hard lofts," such as exposed ceiling beams and ductwork, concrete floors and industrial finishes, particularly if the building is an adaptive re-use of an existing industrial structure.



Soft Loft

• <u>Luxury Apartment</u>: A more conventionally-finished apartment unit, typically with completely-partitioned rooms.—trim, interior doors, kitchens and baths are fitted out with higher-end finishes and fixtures.



Luxury Apartment

-Multi-Family-

• <u>Maisonette Apartment Building</u>: A three-story building with an elevation that resembles a row of townhouses; the interior, however, combines single-level and two-level apartments. Each unit has its own street entrance and attached garage, accessed from the rear of the building.



Maisonette apartment buildings

• <u>Mansion Apartment Building</u>: A two- to three-story flexible-use structure with a street façade resembling a large detached or attached house (hence, "mansion"). The attached version of the mansion, typically built to a sidewalk on the front lot line, is most appropriate for downtown locations. The building can accommodate a variety of uses—from rental or for-sale apartments, professional offices, any of these uses over ground-floor retail, a bed and breakfast inn, or a large single-family detached house—and its physical structure complements other buildings within a neighborhood.



Mansion apartment building

• <u>Mixed-Use</u> <u>Building</u>: A pedestrian-oriented building, either attached or free-standing, with apartments and/or offices over flexible ground floor uses that can range from retail to office to residential.



Mixed-use buildings

—SINGLE-FAMILY ATTACHED—

• <u>Townhouse</u>: Similar in form to a conventional suburban townhouse except that the garage—either attached or detached—is located to the rear of the unit and accessed from an alley or auto court. Unlike conventional townhouses, urban townhouses conform to the pattern of streets, typically with shallow front-yard setbacks.



Townhouses

• <u>Duplex</u>: A two-unit townhouse with the garage—either attached or detached—located to the rear of the unit. Like the rowhouse, urban duplexes conform to the pattern of streets, typically with shallow front-yard setbacks. In a corner location, the units can each front a different street.



Corner duplex

—SINGLE-FAMILY DETACHED—

• <u>Cottage</u>: A small one-, one-and-a-half- or two-story single-family detached house on a small lot, often with alley-loaded parking.



Cottage

<u>Urban House Type 1</u>: A one-and-a-half- or two-story single-family detached house on a small lot, often with alley-loaded parking with attached, detached, or open parking—whether alley-loaded or not—set well back from the front façade; in many instances, the garage is framed by a porte-cochère.



Urban house with porte-cochère carport



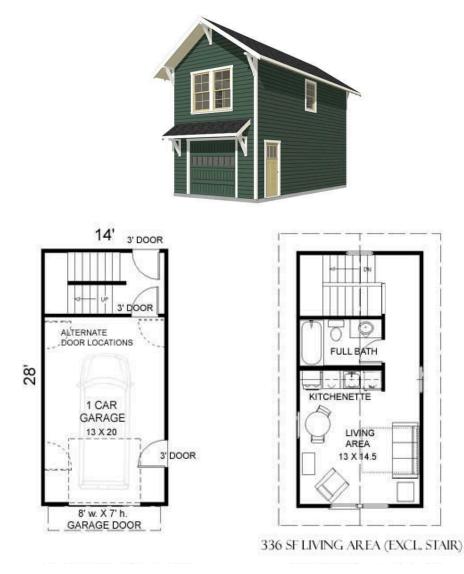
Urban house with porte-cochère and garage

• <u>Urban House Type 2</u>: A two- or three-story single-family detached house relatively close to the street with attached, detached, or open parking—whether alley-loaded or not—set well back from the front façade; in many instances, the garage is framed by a porte-cochère.



Urban house with porte-cochère and garage

• <u>Accessory Unit</u>: A secondary dwelling unit associated with a principal residence on a single lot. An accessory unit is typically located over the garage, attached or detached, of a rowhouse or detached house. Also known as "garage apartment," "ancillary apartment," "accessory apartment," "granny flat," "outbuilding" when detached, and "backbuilding" when attached to the principal residence.



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Research & Strategic Analysis

ASSUMPTIONS AND LIMITATIONS—

Every effort has been made to insure the accuracy of the data contained within this analysis. Demographic and economic estimates and projections have been obtained from government agencies at the national, state, and county levels. Market information has been obtained from sources presumed to be reliable, including developers, owners, and/or sales agents. However, this information cannot be warranted by Zimmerman/Volk Associates, Inc. While the methodology employed in this analysis allows for a margin of error in base data, it is assumed that the market data and government estimates and projections are substantially accurate.

Absorption scenarios are based upon the assumption that a normal economic environment will prevail in a relatively steady state during development of the subject property. Absorption paces are likely to be slower during recessionary periods and faster during periods of recovery and high growth. Absorption scenarios are also predicated on the assumption that the product recommendations will be implemented generally as outlined in this report and that the developer will apply high-caliber design, construction, marketing, and management techniques to the development of the property.

Recommendations are subject to compliance with all applicable regulations. Relevant accounting, tax, and legal matters should be substantiated by appropriate counsel.

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Research & Strategic Analysis

RIGHTS AND STUDY OWNERSHIP—

Zimmerman/Volk Associates, Inc. retains all rights, title and interest in the methodology and target market descriptions contained within this study. The specific findings of the analysis are the property of the client and can be distributed at the client's discretion.

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ZIMMERMAN/VOLK ASSOCIATES, INC., 2014

Retail Market Analysis

Hartland Township, Michigan



Prepared for: Hartland Township

Prepared by: Gibbs Planning Group

10 April 2019

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INTRODUCTION



Figure 1: Aerial photo of Hartland Township's center-US 23 and M-59 Highways (Source: Google Earth).

Executive Summary

This study finds that Hartland Township can presently support approximately 117,000 additional square feet (sf) of retail and restaurant development potentially generating over \$35 million in new sales. By 2025, the township will be able to support up to an additional 134,000 sf of development. Finally, by 2035, Hartland will be able to support approximately 160,000 sf of additional commercial generating \$51 million in sales. The supportable retail includes apparel, home furnishings, home improvement, a pharmacy, restaurants and sporting goods. If developed, this 160,000 sf of new commercial would require approximately 20-25 acres of vacant land to implement or, it could be absorbed by existing businesses through expanded operations.

This estimated demand is in addition to both existing and proposed commercial and retail centers presently approved by the Township including the Hartland Towne Center's proposed 300,000 sf of undeveloped commercial space. The center's potential expansion includes a large anchor that would expand Hartland's existing trade area and induce additional commercial demand for the township overall. Should the Towne Center not expand, Hartland would retain a demand for approximately 250,000 - 300,000 sf of new retail development. Alternatively, the additional retail sales could also be absorbed by existing businesses through expanded operations.

This study further finds that Hartland's primary trade area has a population of 36,300 people, increasing under current trends to 37,900 people by 2023. Median household income in the primary trade area is \$88,900, which is higher than county and state averages. Housing greatly favors owner-occupied units, which comprise 84.1 percent of all housing, compared to 9.6 percent renter-occupied households; the vacancy rate is 6.3 percent. The primary trade area has a labor base of 8,200 employees.

Retail Category	Est. 2018 Supportable SF	Est. 2025 Supportable SF	Est. 2035 Supportable SF			
Retail						
Apparel Stores	7,700 sf	8,500 sf	9,600 sf			
Auto Parts Stores	2,700 sf	3,300 sf	4,200 sf			
Beer, Wine & Liquor Stores	2,600 sf	2,900 sf	3,400 sf			
Book & Music Stores	1,700 sf	1,900 sf	2,100 sf			
Department Store Merchandise	10,900 sf	13,000 sf	16,100 sf			
Electronics & Appliance Stores	5,300 sf	5,700 sf	6,400 sf			
Furniture Stores	6,600 sf	7,100 sf	7,900 sf			
General Merchandise Stores	8,800 sf	9,600 sf	10,800 sf			
Hardware/Home Improvement Stores	12,000 sf	14,800 sf	19,000 sf			
Home Furnishings Stores	4,200 sf	4,500 sf	5,100 sf			
Jewelry Stores	2,300 sf	2,500 sf	2,800 sf			
Miscellaneous Store Retailers	3,600 sf	4,200 sf	5,100 sf			
Pharmacy	12,900 sf	14,600 sf	17,200 sf			
Shoe Stores	1,900 sf	2,100 sf	2,400 sf			
Specialty Food Stores	3,000 sf	3,500 sf	4,300 sf			
Sporting Goods & Hobby Stores	4,900 sf	5,600 sf	6,600 sf			
Retailer Totals	91,100 sf	103,800 sf	123,000 sf			
Restaurants						
Bars, Breweries & Pubs	2,100 sf	2,200 sf	2,600 sf			
Full-Service Restaurants	13,400 sf	15,800 sf	19,400 sf			
Limited-Service Eating Places	8,800 sf	10,300 sf	12,700 sf			
Special Food Services	1,400 sf	1,600 sf	1,800 sf			
Restaurant Totals	25,700 sf	29,900 sf	36,500 sf			
Retail & Restaurant Totals	116,800 sf	133,700 sf	159,500 sf			

Table 1: The leading supportable retail categories are pharmacy, hardware/home improvement, department store merchandise and full-service restaurants.

Background

Gibbs Planning Group, Inc. (GPG) has been retained by Hartland Township to conduct a retail feasibility analysis to determine how much retail is supportable in the Township.

GPG addressed the following issues in this study:

- What is the existing and planned retail market in the greater Hartland area?
- What is the primary trade area for Hartland Township?

- What are the population, demographic and lifestyle characteristics in the primary trade area, currently and projected for 2023?
- What is the current and projected growth for retail expenditures in the primary trade area, now, in 2025 and 2035?
- How much additional retail and restaurant square footage is supportable in the Hartland Township? What sales volumes can development achieve in or near the study area?

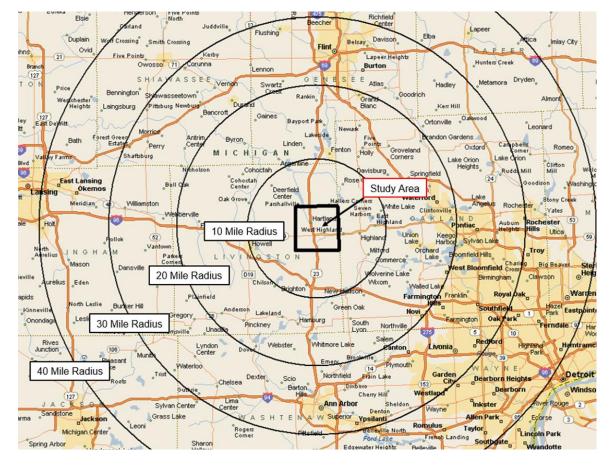


Figure 2: Hartland Township is centrally located in the State of Michigan between Detroit, Lansing, Flint and Ann Arbor.

Methodology

To address the above issues, GPG defined a trade area that would serve the retail in Hartland based on geographic and topographic considerations, traffic access/flow in the area, relative retail strengths and weaknesses of the competition, concentrations of daytime employment and the retail gravitation in the market, as well as our experience defining trade areas for similar markets. Population, consumer expenditure and demographic characteristics of trade area residents were collected by census tracts from the U.S. Bureau of the Census, U.S. Bureau of Labor Statistics and Esri (Environmental Systems Research Institute).

Finally, based on the projected consumer expenditure capture (demand) in the primary trade area of the gross consumer expenditure by retail category, less the current existing retail sales (supply) by retail category, GPG projects the potential net consumer expenditure (gap) available to support existing and new development. The projected net consumer expenditure capture is based on

household expenditure and demographic characteristics of the primary trade area, existing and planned retail competition, traffic and retail gravitational patterns and GPG's qualitative assessment of Hartland Township. Net potential captured consumer expenditure (gap) is equated to potential retail development square footage, with the help of retail sales per square foot data provided by Dollars and Cents of Shopping Centers (Urban Land Institute and International Council of Shopping Centers), qualitatively adjusted to fit the urbanism and demographics of the study area.

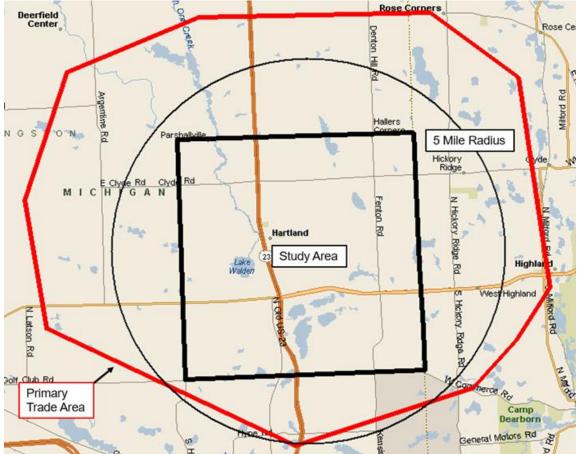


Figure 3: Hartland Township has two community shopping centers. The Shops at Waldenwoods (on the left) is anchored by Target and Kroger, and also includes Hallmark, Subway, Grondin's Hair Center and the popular pizza restaurant Tony Saccos. Hartland Plaza (on the right) features anchor tenants Rural King and Dollar Tree, as well as inline tenants such as Gus's Carry Out, Great Clips, Red Olive Restaurant and El Cerro Grande Mexican Restaurant.

For the purposes of this study, GPG has assumed the following:

- Other major retail centers may be planned or proposed in the shown trade areas, but only the existing built or approved by the township retail is considered for this study. The quality of the existing retail trade in the study area is projected to remain constant. Gains in future average retail sales per square foot reflect higher sales per sf in newly developed retail and selected increases in sales by individual retail categories.
- No major regional retail centers will be developed within the trade area of this analysis through 2035 for the purposes of this study, except as presently approved by the Township including the Towne Center Square.
- The Hartland region's economy will continue at normal or above normal ranges of employment, inflation, retail demand and growth.
- Hartland Township's zoning policies will allow infill and redevelopment projects with current and innovative standards, and the existing infrastructure (water, sewer, arterial roadways, etc.) can support additional commercial development.
- Annual population growth for the primary trade area is estimated to be 0.84 percent from 2018 to 2023.
- Employment distribution is projected to remain constant, without a spike or decline in employment by NAICS categories.

- The projected lease and vacancy rate model is based on our proprietary econometric model of the relationship between changes in employment and changes in vacancy and lease rates. Data was gathered from the U.S. Census Bureau, Esri, CBRE and local brokerage services.
- Any new construction in the study area will be planned, designed, built and managed to the best practices of the American Institute of Architects, American Planning Association, American Society of Landscape Architects, Congress for New Urbanism, International Council of Shopping Centers and The Urban Land Institute.
- Parking, signage and visibility for new development projects or businesses will meet or exceed the industry standards.
- Infill or new commercial development projects in the study area will open with sustainable amounts of retail and anchor tenants, at planned intervals and per industry standards.



Trade Areas

Figure 4: Hartland Township's primary trade area encompasses approximately 109-square-miles.

Based on GPG's site evaluation, the existing retail hubs, population clusters, highway access, and the retail gravitation in the market, as well as our experience defining trade areas for similar communities, it was determined that consumers in the Hartland primary trade area generate demand to support a variety of retailers. This potential will continue to increase over the next five

years, sustained by on-site residential development and average annual household income growth of 3.57 percent.

The primary trade area is the consumer market where the study area has a significant competitive advantage because of access, design, lack of quality competition and traffic and commute patterns. This competitive advantage equates to a potential windfall in the capture of consumer expenditure by the retailers in the study area. GPG defined a primary trade area by topography, vehicular access, strength of retail competition and residential growth patterns instead of standardized "drive-times." Consumers inside the primary trade area will account for up to 60 to 70 percent of the total sales captured by retailers in Hartland Township.

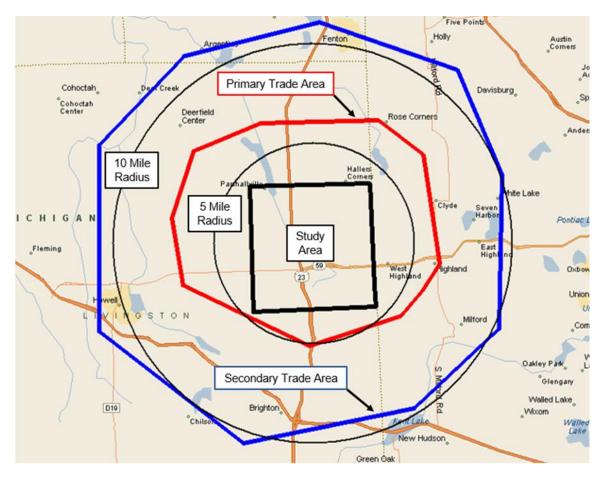


Figure 5: The primary and secondary trade area map of Hartland Township. The secondary trade area is shown above outlined in blue. Secondary trade area residents can conveniently reach the study area, but it will not be their preferred shopping destination.

The following borders approximately delineate the primary trade area:

- North Center Road
- South West Commerce Road & Morgan Lake
- East Buckhorn Lake Road & Eleanor Street
- West Gulley Road & North Latson Road & Mack Road

Hartland's secondary or community-oriented trade area (Figure 5) extends in all directions to include residents and workers who because of convenient access may in the future generate

expenditure for Hartland Township retailers. The boundaries of the secondary or communityoriented trade area extend north to Murray Lake, Ponemah Lake and Mill Pond, east to Ormond Road and Driftwood Drive, south to Kent Lake and the Brighton State Recreation Area, and west to Peavy Road and Oak Grove Road. Residents who live in the secondary, but not the primary, trade area will shop at Hartland Township retailers frequently, but the area will not be their primary shopping destination. Consumer expenditure by these residents will account for 10 to 20 percent of retail sales.

Demographic Characteristics

Using data from Esri (Environmental Systems Research Institute) and the U.S. Census Bureau, GPG obtained the most recent Hartland area population and demographic characteristics (2018), and those projected for 2023 for the defined trade areas, Livingston County, and the State of Michigan.

Characteristics	Primary Trade Area	Secondary Trade Area	Livingston County	State of Michigan
2018 Population	36,300	147,400	193,700	10,057,200
2023 Population	37,900	153,100	203,300	10,182,800
2018-23 Projected Annual Growth Rate	0.84%	0.76%	0.97%	0.25%
2018 Households	13,000	56,400	72,600	3,957,600
2023 Households	13,600	58,700	76,400	4,015,500
2018-23 Projected Annual HH Growth Rate	0.90%	0.82%	1.03%	0.29%
Persons Per Household 2018	2.79	2.60	2.65	2.48
Median Age	43.2	43.2	42.9	40.2
2018 Median Household Income	\$88,900	\$80,500	\$79,700	\$53,700
2018 Average Household Income	\$107,500	\$100,400	\$98,700	\$74,100
2023 Median Household Income	\$102,300	\$92,100	\$90,400	\$60,900
2023 Average Household Income	\$128,100	\$118,500	\$116,500	\$87,600
% Households w. incomes \$75,000+	59.5%	54.1%	53.6%	35.4%
% Bachelor's Degree or higher	37.5%	37.6%	35.3%	28.6%

Table 2: Demographic Comparisons

Table 2: This side-by-side table compares and contrasts the primary trade area demographic statistics with those of the secondary trade area, Livingston County and the State of Michigan.

Hartland's primary trade area has an estimated 2018 population of 36,300 people, which will increase at an annual rate of 0.84 percent to 37,900 by 2023. This population growth rate is higher than that for the secondary trade area and State of Michigan, but lower than for Livingston County. The number of households in the primary trade area will increase from 13,000 to 13,600, holding 2.79 people per household. Median household income is \$88,900 and is expected to increase to \$102,300 by 2023. Average household income in the primary trade area is \$107,500, while 59.5 percent of households earn over \$75,000 per year - higher than the county and state figures. Displaying higher levels of education than the state, 37.5 percent of residents over the age of 25 have earned a bachelor's degree or higher, compared to 28.6 percent for Michigan. The median age is older than the state at 43.2.

The secondary trade area demonstrates a lower growth rate in households than that for the primary trade area and county, but a much higher growth rate than that for the State of Michigan. There are 147,400 residents increasing by 0.76 percent annually to 153,100 by 2023. This growth rate is also lower than the annual growth rate for the primary trade area and county, and higher than that for the State of Michigan. The number of households is 56,400, increasing to 58,700 by 2023. Median household income in the secondary trade area is \$80,500 and the average household income is \$100,400, both of which are higher than the state's figures. Median household incomes are expected to increase to \$92,100 by 2023, while average household incomes will have grown by 18.0 percent to \$118,500. Educational attainment of a bachelor's degree or higher is at 37.6 percent and 54.1 percent of households earn more than \$75,000 annually. The median age is 43.2.

Approximately 93.7 percent of primary trade area homes are occupied, and the median home value is estimated to be \$267,600. Of all households, 84.1 percent are owner-occupied, a number that has decreased 0.6 percent since 2010 and is expected to increase to 84.4 percent by 2023. Renter-occupied households have increased from 9.0 percent in 2010 to 9.6 percent in 2018 and are expected to slightly decrease to 9.3 percent by 2023. The vacancy rate has basically stayed the same from 2010 through 2018 and is expected to stay constant through 2023. The percentage of housing units valued at over \$200,000 is expected to increase from 72.2 percent to 81.3 percent - coinciding with an increase in the median home value to \$301,300 by 2023.

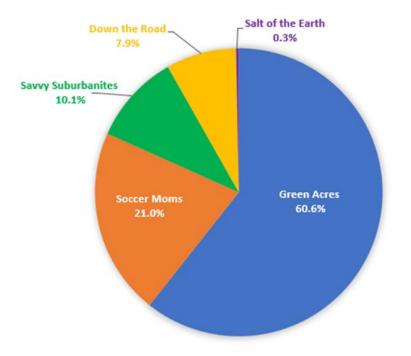


Figure 6: The relative proportions of the Tapestry Lifestyle segments found in the primary trade area.

Tapestry Lifestyles

Esri has developed Tapestry Lifestyles, which is an attempt to create 65 classifications, or lifestyle segments, that help determine purchasing patterns. These segments are broken down to the U.S. Census Block Group level and used by many national retailers to help determine future potential locations. The following Table 3 details the Tapestry Lifestyles found in the primary trade area.

Table 3: Tapestry Lifestyles

Lifestyle	Trade Area Statistics	Short Description
Green Acres	Population 17,200 Households 7,900 Median HH Income \$76,800 60.6% Primary Trade Area Households Market Share 3.2% National Households Market Share	The <i>Green Acres</i> lifestyle features country living and self- reliance. They are avid do-it-yourselfers, maintaining and remodeling their homes, with all the necessary power tools to accomplish the jobs. Gardening, especially growing vegetables, is also a priority, again with the right tools, tillers, tractors, and riding mowers. Outdoor living also features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf. Self-described conservatives, residents of Green Acres remain pessimistic about the near future yet are heavily invested in it.
Soccer Moms	Population 5,900 Households 2,700 Median HH Income \$90,500 21.0% Primary Trade Area Household Market Share 2.9% National Market Share	<i>Soccer Moms</i> is an affluent, family-oriented market with a country flavor. Residents are partial to new housing away from the bustle of the city but close enough to commute to professional job centers. Life in this suburban wilderness offsets the hectic pace of two working parents with growing children. They favor time-saving devices, like banking online or housekeeping services, and family-oriented pursuits.
Savvy Suburbanites	Population 3,000 Households 1,300 Median HH Income \$108,700 10.1% Primary Trade Area Households Market Share 3.0% National Households Market Share	Savvy Suburbanites residents are well educated, well read, and well capitalized. Families include empty nesters and empty nester wannabes, who still have adult children at home. Located in older neighborhoods outside the urban core, their suburban lifestyle includes home remodeling and gardening plus the active pursuit of sports and exercise. They enjoy good food and wine, plus the amenities of the city's cultural events.

Lifestyle	Trade Area Statistics	Short Description
Down the Road	Population 2,000 Households 1,000 Median HH Income \$36,000 7.9% Primary Trade Area Households Market Share 1.1% National Households Market Share	Down the Road is a mix of low-density, semirural neighborhoods in large metropolitan areas; half are located in the South, with the rest chiefly in the West and Midwest. Almost half of householders live in mobile homes; more than two-fifths live in single-family homes. These are younger, diverse communities, with the highest proportion of American Indians of any segment. These family-oriented consumers value their traditions. Workers are in service, retail trade, manufacturing, and construction industries, with higher proportions in agriculture and mining, compared to the US. This market has higher unemployment, much lower median household income and home value, and more than a fifth of households with income below poverty level.
Salt of the Earth	Population 90 Households 40 Median HH Income \$17,000 0.3% Primary Trade Area Households Market Share 2.9% National Market Share	Salt of the Earth residents are entrenched in their traditional, rural lifestyles. Citizens here are older, and many have grown children that have moved away. They still cherish family time and also tending to their vegetable gardens and preparing homemade meals. Residents embrace the outdoors; they spend most of their free time preparing for their next fishing, boating, or camping trip. The majority has at least a high school diploma or some college education; many have expanded their skill set during their years of employment in the manufacturing and related industries. They may be experts with DIY projects, but the latest technology is not their forte. They use it when absolutely necessary but seek face-to- face contact in their routine activities.

Table 3: The top five Tapestry Lifestyle groups profiled above portray a mostly affluent population in a more rural setting.

The primary trade area's most prominent lifestyle group is *"Green Acres,"* which represent 60.6 percent of households. *Green Acres* residents tend to live in rural enclaves in metropolitan areas. The average household size is 2.70, and most households are composed of older married couples without children.

Over 60 percent of this this group is college educated. Their unemployment is low at 3.8 percent, while labor participation rate is high at 66.8 percent. This group's income is derived not only from wages and salaries but also from self-employment, investments and retirement. They are cautious consumers who focus on quality and durability. Their purchasing choices reflect their country life, including a variety of vehicles from trucks and SUVs to ATVs and motorcycles. As homeowners, they favor DIY home improvement projects and gardening. While their economic outlook is professed as pessimistic, these consumers are comfortable with debt (primarily as home and auto loans and investments).

Residents in this group primarily live in single-family, owner-occupied housing, with a median value of \$235,500. They are significantly above the national percentage of home ownership; 86.1

percent own a home compared to 62.7 percent in the US. The median household income of \$76,800 is also much higher than the U.S. median of \$56,100. Their median net worth is an impressive \$267,700, which is significantly higher than the US median of \$93,300. In terms of occupation, office and administrative support employs the most workers in this group followed by management.



Figure 7: The Township's new 10-screen Emagine Entertainment movie theater, which opened on December 15, 2018, is one of the company's most state-of-the-art theaters. It features heated plush reclining seats, wall-to-wall screens, laser projectors with high-contrast lenses and immersive Dolby Atmos sound systems.

Employment Base

The employment picture found in the primary trade area reflects a concentrated services and retail trade sector foundation, comprising 64.6 percent of total employment. Compared to the secondary trade area, the percentage of employees in the primary trade area engaged in the construction and transportation sectors is high and the FIRE (Finance, Insurance & Real Estate) sector is low.

Sector	Primary Trade Area	Secondary Trade Area	Livingston County	State of Michigan
Agriculture and Mining	2.7%	1.6%	1.9%	1.3%
Construction	7.9%	4.4%	5.8%	3.1%
Manufacturing	7.4%	8.9%	16.2%	12.1%
Transportation	4.5%	2.2%	1.5%	2.4%
Communication	0.7%	0.6%	0.3%	0.7%
Utility	0.4%	0.2%	0.2%	0.5%
Wholesale Trade	4.9%	2.9%	3.2%	6.2%
Retail Trade	26.0%	29.9%	25.2%	20.8%
Finance, Insurance & Real Estate	4.3%	9.4%	7.7%	5.5%
Services	38.6%	35.6%	32.3%	42.2%
Government	2.5%	4.0%	5.5%	5.0%
Unclassified	0.8%	0.1%	0.1%	0.2%

Table 4: Employment Comparison by Sector (SIC)

 Table 4: Services and Retail Trade comprise the bulk of primary trade area employment.

As shown in Table 4 above, the services sector employs the largest percentage (38.6 percent) of people in the primary trade area. This proportion of primary trade area workers engaged in the

services sector is slightly higher than that for the secondary trade area and county, but lower than that for the state. Within the primary trade area's services sector, the largest percentage (15.3 percent of total employment in the primary trade area) work in other services, followed by 12.3 percent in health services and 8.3 percent in educational institutions and libraries.

Employment Sector	5-Minute Drive Time	10-Minute Drive Time	Primary Trade Area
Agriculture & Mining	40	200	220
Construction	130	500	650
Manufacturing	150	540	600
Transportation	10	190	370
Communication	20	50	60
Utility	0	10	30
Wholesale Trade	50	310	400
Retail Trade	680	2,055	2,105
Home Improvement	10	130	140
General Merchandise Stores	10	20	20
Food Stores	220	450	520
Auto Dealers, Gas Stations, Auto Aftermarket	30	380	340
Apparel & Accessory Stores	5	5	5
Furniture & Home Furnishings	5	30	10
Eating & Drinking Places	350	810	840
Miscellaneous Retail	50	230	230
Finance, Insurance & Real Estate	85	420	350
Banks, Savings, & Lending Institutions	30	200	120
Securities Brokers	5	20	20
Insurance Carriers & Agents	30	130	130
Real Estate, Holding, Other Investment Offices	20	70	80
Services	800	2,830	3,160
Hotels & Lodging	40	80	130
Automotive Services	20	110	80
Motion Pictures & Amusements	130	400	440
Health Services	120	310	330
Legal Services	10	30	30
Education Institutions & Libraries	210	760	830
Other Services	270	1,140	1,320
Government	30	140	210
Unclassified Establishments	10	10	10
Total Employment	2,005	7,255	8,165

Table 5: Drive Time and Trade Area Employment by Industry Sector

Table 5: Hartland Township can capture daytime expenditure from workers within a 10-minute drive time by offering a convenient collection of restaurants and shops.

As the second leading category of employment, retail workers account for 26.0 percent of employment within the primary trade area. Within this category, eating & drinking places is the leading subcategory of employment comprising 10.3 percent of total employment, followed by food stores (6.4 percent) and auto dealers, gas stations, auto aftermarket (4.2 percent). However, the fact that retail is the second largest employment sector in Hartland Township's primary trade area does not necessarily mean that there is an oversupply of retail in the area; the size and scale

of retailers may require a significant number of workers, but this is not indicative of how well these retailers are supplying goods and services to the surrounding community.

Daytime employment plays a large role in supporting retail. The primary trade area is estimated to have 8,165 employees; an estimated 1,600 of them are office employees who are known to expend at much higher rates, often eating out for lunch and shopping on the way to and from work. The mix of employees throughout the ten-minute drive time varies from the primary trade area most noticeably in the services industry sector, with an additional 330 employees within the primary trade area compared to the primary trade area. Services, retail and manufacturing employ the most people by industry inside the ten-minute drive time with 2,830, 2055 and 540 jobs, respectively. With only 7,255 workers within a ten-minute drive time, there appears to be a fair amount of captive daytime consumers close to the study area,

Category	Weekly Expenditure	Annual Expenditure	Office Worker Expenditure	Non-Office Worker Expenditure	Total Expenditure
Prepared Food & Beverage					
Limited & Full-Service Restaurants	\$40	\$2,300	\$3,680,000	\$4,812,405	\$8,492,405
Drinking Places	\$20	\$900	\$1,440,000	\$1,883,115	\$3,323,115
Retail Goods					
General Merchandise, Apparel, Home Furnishings, Electronics	\$70	\$3,600	\$5,760,000	\$7,532,460	\$13,292,460
Grocery	\$30	\$1,600	\$2,560,000	\$3,347,760	\$5,907,760
Convenience Items	\$20	\$1,000	\$1,600,000	\$2,092,350	\$3,692,350
Total	\$180	\$9,400	\$15,040,000	\$19,668,090	\$34,708,090

Table 6: Ten Minute Drive-Time Worker Expenditure

Table 6: Employees within ten minutes of Hartland expend \$34.7 million dollars annually.

Consumer expenditure from daytime employment compliments that captured in the evenings and on weekends by households in the trade area. "*Office Worker Retail Spending in a Digital Age*," published by the International Council of Shopping Centers in 2012, provides insight into the impact of office worker employment. Weekly office worker expenditure, adjusted for 2018 dollars, is estimated at \$180. Weekly non-office worker expenditure is estimated at 37 percent of office workers. Non-office workers are estimated to have slightly less disposable income, to have multiple work locations including at home, and typically are on the road more during their workweek. Retail purchases (general merchandise, apparel, home furnishings, electronics, grocery and convenience items) make up the majority of the office worker dollars, at \$120 per week. Restaurant expenditures (full service, limited service and drinking places) account for the balance at \$40 per week. Annualized, each office worker expends \$9,400 before, during and after work.

The annual impact of 7,255 workers within ten minutes of Hartland Township's village center is \$34.7 million. This expenditure breaks down to include \$11.8 million in prepared food and beverage establishments, \$5.9 million in grocery purchases, \$13.3 million in retail sales and \$3.7 in convenience items. Catering to the daytime worker crowd with fast-casual restaurants, convenient on-street parking and extended evening hours may increase the worker expenditure captured by study area retailers.

TRADE AREA CHARACTERISTICS

Location

The Hartland's commercial primary trade area, which covers 109 square miles, is located in southeastern Michigan. Its irregular shape stretches approximately five miles north to Center Road, east to Buckhorn Lake Road down to Eleanor Street, south to West Commerce Road across to Morgan Lake, and west to Gulley Road up to North Latson Road and Mack Road. These boundaries are approximately 35 miles east of Lansing, 20 miles south of Flint, 20 miles north of Ann Arbor and 35 miles northwest of Detroit. US 23 (running north-south) bisects the trade area, while M-59 (running east-west) goes through its lower half. Lakes are abundant in the trade area, which include Lobdell Lake, Silver Lake and Runyan Lake in the north, White Lake and Woodruff Lake in the east, Big Crooked Lake and Woodland Lake in the south, and Thompson Lake and Indian Lake in the west.

Hartfield Township is in the very center of the largely rural primary trade area. The northern section of the trade area features the Tyrone Hills Golf Club and a few relatively small manufacturing facilities. The eastern section of the trade area has significant residential development south of Clyde Road. Many single-family homes surround Charlick Lake, Woodruff Lake and the Prestwick Village Golf Club, and there is a large mobile home park (called the "Highland Green Estates") just west of North Milford Road.

The southern section of the trade area has moderate residential development and is home to two Hartland public schools (Hartland Lakes Elementary School and Hartland Farms Intermediate School) and the Huntmore Golf Club. The western section of the trade area is sparsely populated and is mostly comprised of golf courses and widely dispersed single-family homes, farms and undeveloped farmland. Lastly, the primary trade area has a Walk Score of 51, which classifies it as "somewhat walkable".

Location	Traffic Count, AADT	Year
U.S. Route 23 at M-59	51,700	2015
U.S. Route 23 north of Clyde Road	46,400	2017
M-59 at Fenton Road	36,900	2017
M-59 at Tipsico Lake Road	29,100	2014
Hickory Ridge Road at Commerce Road	11,600	2016
Hartland Road north of M-59	6,300	2013
Clyde Road at Parshallville Road	5,500	2016
Denton Hill Road at Holtforth Road	1,900	2016
North Hacker Road at Golf Club Road	1,600	2015
Middle Road at Hickory Ridge Road	1,600	2012
Lone Tree Road at Rowe Road	1,200	2012
Pleasant Valley Road north of Commerce Road	1,200	2015

Table 7: Traffic Counts

Table 7. The traffic chart shows the heaviest traffic on U.S. Route 23 and M-59, both of which run through the center of Hartland Township (source: https://semcog.org).

Access

Regional linkage is strong in the primary trade area. US-23 (running north-south) connects the primary trade area to Fenton and Brighton, while M-59 (running east-west) connects the primary trade area to Howell and Highland. Furthermore, there are several local roads surrounding the Township that make it easily accessible. Of these local roads, the most traffic enters Hartland Township from the north via Hartland Road, from the south via North Hacker Road, from the west via Clyde Road, and from the east via Hickory Ridge Road.

Traffic volumes seen in Table 7 confirm the routes with the best access, the main commuting routes of US-23, M-59 and Hickory Ridge Road. With convenient road capacity, existing and future retailers will be exposed to a significant number of consumers; however, appropriate signage is necessary to guide patrons to their ultimate shopping destination.

Hartland Towne Square

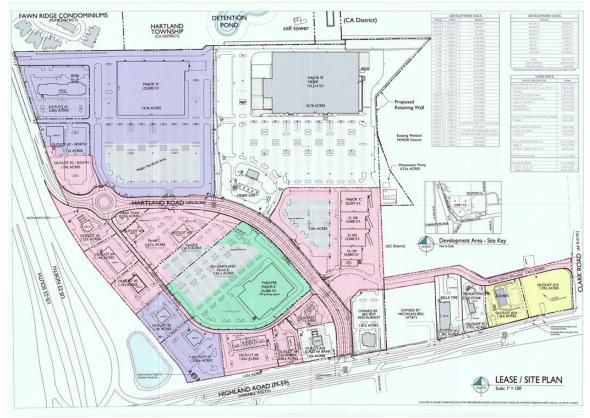
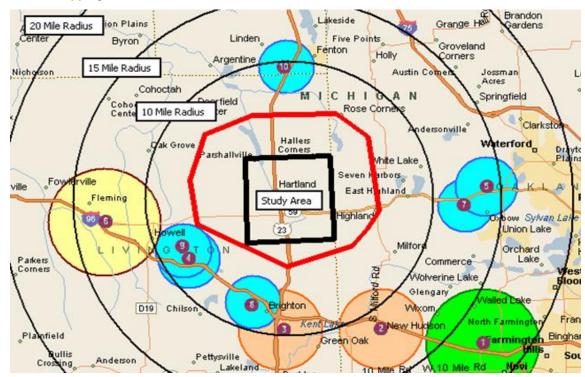


Figure 8: Hartland Towne Square approved PUD master plan.

The Hartland Towne Square shopping center is approved by the Township to build a 550,000 sf open air community center on 80 acres located at the northeast corner of Highland Road and US 23. Currently, the center is includes a 190,000 sf Meijer, new state-of-the-art 55,000 sf Emagine Theater, as well as Belle Tire, Flagstar Bank and Tim Hortons. Under the approved PUD plan (shown above), the center is entitled to add a 125,000 sf anchor space, 20,000 sf junior anchor space, 70,000 sf of retail and an additional 80,000 sf of outparcels available for retail, restaurant, hotel or other commercial uses. This study's findings assume the Towne Square will be completed as presently approved as a 550,000 sf center including the proposed 125,000 sf retail anchor.

Historic Hartland Village

Hartland's historic village is located directly east of US 23, one and a half miles north of M-59. It is tucked away in a picturesque residential neighborhood and features quaint buildings housing local businesses, the Hartland Music Hall and the Cromaine Library. The Hartland Music Hall's building is an Early Greek Revival architecture constructed in 1858. Today, it is used extensively for the Hartland Players' and Encore Youth Theater's rehearsals and performances, as well as for special events sponsored by Hartland Community Education. The Cromaine Library is an impressive example of early American Federalist architecture and has served the residents of the Hartland Consolidated School district and surrounding townships since 1927. The village's historic walkable character could potentially attract additional unique retailers and restaurants.



Other Shopping Areas

Retail Center Name	Shopping Center Type	Retail Size (sf)	Distance to Study Area
1. Twelve Oaks Mall	Regional Center	1,500,000 sf	17 miles
2. Lyon Towne Center	Power Center	520,000 sf	11 miles
3. Green Oak Village Place	Community Center	500,000 sf	9 miles
4. Livingston Commons	Power Center	370,000 sf	8 miles
5. White Lake Marketplace	Power Center	360,000 sf	14 miles
6. Tanger Outlets Howell	Outlet Center	350,000 sf	13 miles
7. Village Lakes	Community Center	300,000 sf	12 miles
8. Brighton Mall	Power Center	290,000 sf	7.5 miles
9. Grand River Plaza	Community Center	220,000 sf	8 miles
10. Silver Pointe	Community Center	160,000 sf	9.5 miles

Figure 9 & Table 8: Map and table of the competing regional, power, outlet and community shopping centers.

1. Twelve Oaks Mall



Figure 10: In terms of gross leasable area and total stores, the Twelve Oaks Mall is one of the largest shopping centers in the State of Michigan.

Twelve Oaks Mall was developed in 1977 as a joint venture between A. Alfred Taubman, Homart Development, and the Dayton-Hudson Corporation. Initially only anchored by Hudson's, Sears opened shortly thereafter, followed by Lord & Taylor and JCPenney. Twelve Oaks Mall is one of four regional Taubman malls built in Metro Detroit during the late 1970s, the other three being Lakeside Mall, Briarwood Mall, and the Fairlane Town Center. Today, Twelve Oaks Mall features 1.5 million sf of retail space and over 180 stores. Currently, the anchor tenants of the Twelve Oaks Mall are JC Penney, Nordstrom, Lord & Taylor, Sears, and Macy's. Some of its other notable retailers and restaurants are Abercrombie & Fitch, Apple, California Pizza Kitchen, Coach, Fossil, H&M, Johnston & Murphy, Iululemon athletica, and Pottery Barn. The Twelve Oaks Mall is located 17 miles southeast of the center of Hartland Township.

2. Lyon Towne Center

Sprawling over 78 acres, Lyon Towne Center is a 520,000 sf power center that contains a 230,000 sf Walmart Supercenter and 150,000 sf Lowe's Home Improvement. This center also includes several outparcels with restaurants such as Starbucks, Applebee's, McDonalds, Jet's Pizza and Leo's Coney Island. The Lyon Towne Center benefits from excellent visibility and accessibility, as it is visible from I-96 and located right off the I-96 Milford Road exit. It is located 11 miles southeast of Hartland Township.



3. Green Oak Village Place

Figure 11: Petco (on left) and Rollin Stone Wood Fire Pizza (on right) are just two of several stores and restaurants that have opened at the Green Oak Village Place in the past year.

Green Oak Village Place is a large, 500,000 sf, community shopping center. This \$100 million center opened in stages between 2006 and 2008, and now spans 68-acres. It was developed,

and is still owned, by Lormax Stern and REDICO. Green Oak Village Place has six anchor stores: Dick's Sporting Goods, JCPenney, HomeGoods, DSW Shoe Warehouse, Barnes & Noble and TJMaxx. Additionally, it features over fifty inline tenants, such as Pier 1 Imports, Victoria's Secret, Ann Taylor Loft, Five Below, Kerby's Coney Island, Rolling Stone Wood Fire Pizza and Salsarita's Fresh Cantina. Green Oak Village Place was honored three years running with the "People Choice Award" for shopping in Livingston County. It enjoys near complete occupancy and is located 9 miles south of the center of Hartland Township.

4. Livingston Commons Shopping Center

Located across Grand River Avenue from the Grand River Plaza shopping center, Livingston Commons is a 370,000 sf community center. It benefits from being in one of the strongest retail corridors in Livingston County, as there is over 1.5 million sf of retail space within a 0.75-mile radius of Livingston Commons. This center also benefits from being situated just off of the newly constructed full access Latson Road exit on I-96, allowing for easy access for consumers in all directions. The tenants of Livingston Commons are Wal-Mart Supercenter, Lowe's Home Improvement, PetSmart, and restaurants that occupy separate small outparcels, including KFC, White Castle, Red Olive Restaurant, Bob Evans, Culver's, Panera Bread and Tim Hortons. Livingston Commons is 8 miles southwest of the center of Hartland Township.

5. White Lake Marketplace



Figure 12: White Lake Marketplace features a 150,000 sf Walmart Supercenter and 120,000 sf Home Depot.

Owned by Gershenson Realty & Investment, White Lake Marketplace is a 360,000 sf power center located on Highland Road. The tenants of this shopping center are Walmart Supercenter, Home Depot, Jo-Ann Fabrics and Crafts, Bed Bath & Beyond, OfficeMax, Maurices, Gamestop, Bath & Body Works, Taco Bell and Applebee's. White Lake Marketplace is currently 99 percent leased and managed by Mid America Real Estate. It is located 14 miles east of Hartland Township.

6. Tanger Outlets Howell

What is now Tanger Outlets Howell originally opened in 1996 as the Kensington Valley Factory Shops. The outlet mall was renamed in 2002 when it was bought by the Tanger REIT (Real Estate Investment Trust) for \$37.5 million. For years, Tanger Outlets Howell has been the number one attraction in Livingston County, as it draws over 2 million visitors each year. It consists of 60 outlet stores that total 350,000 sf. These stores include apparel, accessories & jewelry, home furnishings and specialty stores such as Banana Republic Factory, Polo Ralph Lauren Factory Store, H&M, Zale's The Diamond Store Outlet, Kitchen Collection and Pandora.

Last spring and summer, Tanger Outlets Howell hosted a total of seven food truck rallies and added a 9-hole miniature golf course. Tanger Outlets Howell is located 13 miles west of the center of Hartland Township.



Figure 13: Several popular outlet stores have moved into Tanger Outlets Howell during the past two years, including H&M (on left) and Levi's Outlet (on right).

7. Village Lakes Shopping Center

Located in the City of White Lake on M-59, the Village Lakes is a 300,000 sf community shopping center. It is anchored by a 120,000 sf Kroger Marketplace (which opened in 2016), Hobby Lobby, JCPenney and Marshalls. Some of its other tenants are Ulta Beauty, Waterfall Jewelers, Famous Footwear and The Root Restaurant and Bar. Village Lakes is currently 99 percent leased. It benefits from excellent visibility, as 45,000 vehicles per day pass it on M-59. This shopping center is managed by Mid America Real Estate and is located 12 miles east of Hartland Township.

8. Brighton Mall

The Brighton Mall originally opened in 1970 as an enclosed mall, with an A&P supermarket, Grant City department store and twenty-five inline tenants. It struggled, and by the early 1990s was largely vacant. As a result, in 1996, the entire indoor mall was demolished and rebuilt as a series of big box tenants. Today, the Brighton Mall is a 290,000 sf power center that features Marshalls, Bed Bath & Beyond, Jo-Ann Fabrics and Craft Stores, Gardner-White Furniture, Michaels, Aldi, Best Buy and PetSmart. This power center also includes outparcels with the restaurants Panera Bread, McDonalds and Starbucks. The Brighton Mall benefits from excellent visibility, as it is exposed to 86,000 vehicles per day along I-96 and 38,000 vehicles per day along Grand River Avenue. The Brighton Mall is located 7.5 miles south of the center of Hartland Township.

9. Grand River Plaza

Built in 1992, Grand River Plaza is a 220,000 sf community center. It is located on the north side of Grand River Avenue, across from the Livingston Commons shopping center. In the summer of 2018, Carson's closed its 73,000 sf location in this center, and its former location still sits vacant. With Carson's closed, Grand River Plaza's remaining anchor tenants are Dunham's Sports, Big Lots and Family Farm & Home. Some of its smaller tenants are Toys for Tots, Asian Fusion, GNC, Kolt Jewelers and Perfect Edge Hockey. Its current occupancy rate is only 61 percent. Grand River Plaza is located 8 miles southwest of the center of Hartland Township.



Figure 14: Although Carson's closed its 73,000 sf location at the Grand River Plaza in the summer of 2018, shortly thereafter Family Farm & Home opened a 28,000 sf store in the shopping center.

10. Silver Pointe Shopping Center

Located in the City of Fenton, across from a separately owned 190,000 sf Walmart Supercenter, Silver Pointe is a 160,000 sf community shopping center. Anchored by VC's Grocery and Dunham's Sports, its other tenants include Bath & Body Works, Payless ShoeSource, GNC, Sally Beauty Supply and Painting with a Twist. The Silver Pointe shopping center is owned and managed by Brixmor, and its current occupancy rate is 81 percent. It is 9.5 miles north of the center of Hartland Township.

SUMMARY of FINDINGS

This study finds that Hartland Township's area can presently support up to 116,800 additional square feet (sf) of retail and restaurant development, which could potentially generate over \$35.4 million in new sales. By 2025, the primary trade area will be able to support up to an additional 133,700 sf of retail and restaurant development which could generate \$43 million in new sales, Finally, by 2035, the Hartland will be able to support up to an additional 159,500 sf of retail and restaurant development which could generate \$50.7 million in new sales.

This supportable commercial is in addition to existing and approved commercial development in Hartland, including the remaining 300,000 sf of the Hartland Towne Center. The center's potential expansion includes a large anchor that would expand Hartland's existing trade area and induce additional demand for the township overall. Should the Towne Center not expand, Hartland would retain a demand for approximately 250,000 - 300,000 sf of new retail development. Alternatively, the additional retail sales could also be absorbed by existing businesses through expanded operations.

By 2035, this new commercial development could include:

- **Corner Stores**: Two to three corner stores at 1,500 to 2,500 sf, located at main intersections surrounding the study area. Locating these stores along the busiest entryways provides the best access for these types of stores.
- Convenience Centers: Two to three 15,000 to 20,000 sf convenience centers located as close to residents as possible. The convenience center(s) can be located in the first floor of a mixed-use building as long as they can be seen from the primary road. These centers can include a wide range of retailers such as apparel, books & music stores, electronics, financial services, pharmacy and a full-service restaurant.

- Neighborhood Center: One 100,000 sf neighborhood center should a grocery store be attracted to the site. This center could support a department store, and its remaining gross leasable area should feature a wide variety of retailers including general merchandise, apparel, electronics, furniture, jewelry, pharmacy, sporting goods, bars and fast-casual and full-service restaurants.
- **Town Center**: One 160,000 sf town center which differentiates from a lifestyle center by incorporating a mixture of land uses such as civic, office, residential and hospitality. The center would be arranged in a walkable street-grid and feature anchor tenants as well as apparel, books and music, department store merchandise, electronics, furniture and home furnishings, general merchandise, jewelry, gifts, pharmacy and other health and beauty stores, specialty food, sporting goods and a critical mass of dining options.

A detailed examination of the supportable sf of retail uses is found in the following Table 9:

Retail Category	Est. 2018 Supportable SF	2018 Sales/SF	Est. 2018 Retail Sales	Est. 2025 Supportable SF	Est. 2025 Retail Sales	Est. 2035 Supportable SF	Est. 2035 Retail Sales
Retailers							
Apparel Stores	7,700	\$290	\$2,233,000	8,500	\$2,465,000	9,600	\$2,784,000
Auto Parts Stores	2,700	\$245	\$661,500	3,300	\$808,500	4,200	\$1,029,000
Beer, Wine & Liquor Stores	2,600	\$385	\$1,001,000	2,900	\$1,116,500	3,400	\$1,309,000
Book & Music Stores	1,700	\$240	\$408,000	1,900	\$456,000	2,100	\$504,000
Department Store Merchandise	10,900	\$260	\$2,834,000	13,000	\$3,380,000	16,100	\$4,186,000
Electronics & Appliance Stores	5,300	\$340	\$1,802,000	5,700	\$1,938,000	6,400	\$2,176,000
Furniture Stores	6,600	\$265	\$1,749,000	7,100	\$1,881,500	7,900	\$2,093,500
General Merchandise Stores	8,800	\$315	\$2,772,000	9,600	\$3,024,000	10,800	\$3,402,000
Hardware/Home Improvement	12,000	\$250	\$3,000,000	14,800	\$3,700,000	19,000	\$4,750,000
Home Furnishings Stores	4,200	\$275	\$1,155,000	4,500	\$1,237,500	5,100	\$1,402,500
Jewelry Stores	2,300	\$345	\$793,500	2,500	\$862,500	2,800	\$966,000
Miscellaneous Store Retailers	3,600	\$265	\$954,000	4,200	\$1,113,000	5,100	\$1,351,500
Pharmacy	12,900	\$385	\$4,966,500	14,600	\$5,621,000	17,200	\$6,622,000
Shoe Stores	1,900	\$315	\$598,500	2,100	\$661,500	2,400	\$756,000
Specialty Food Stores	3,000	\$295	\$885,000	3,500	\$1,032,500	4,300	\$1,268,500
Sporting Goods & Hobby Stores	4,900	\$270	\$1,323,000	5,600	\$1,512,000	6,600	\$1,782,000
Retailer Totals	91,100	\$296	\$27,136,000	103,800	\$30,809,500	123,000	\$36,382,000
Restaurants							
Bars, Breweries & Pubs	2,100	\$330	\$693,000	2,200	\$726,000	2,600	\$858,000
Full-Service Restaurants	13,400	\$350	\$4,690,000	15,800	\$5,530,000	19,400	\$6,790,000
Limited-Service Eating Places	8,800	\$280	\$2,464,000	10,300	\$2,884,000	12,700	\$3,556,000
Special Food Services	1,400	\$315	\$441,000	1,600	\$504,000	1,800	\$567,000
Restaurant Totals	25,700	\$319	\$8,288,000	29,900	\$9,644,000	36,500	\$11,771,000
Retailer & Restaurant Totals	116,800	\$301	\$35,424,000	133,700	\$40,453,500	159,500	\$48,153,000

Table 9: 2018, 2025 and 2035 Supportable Retail Table Hartland Township Primary Trade Area

 Table 9:
 Estimated new supportable retail and sales for Hartland Township 2018-2035. Sales stated in constant 2018 dollars.

These retail centers could be developed as stand-alone, single-site conventional shopping centers or likely integrated into the walkable, mixed-use development with two-way streets, on street parking, plazas or squares and urban storefronts.

The demographics of the primary trade area show a population base of 36,300 people, which will increase to 37,900 by 2023, at an annual growth rate of 0.84 percent. The persons per household is 2.79, and the median age is 43.2 years old. Median household income of \$88,900 in the primary trade area is higher than county and state averages. The average household income is \$107,500 demonstrating a positive effect on spending potential from the top wage earners in the area. Educational attainment is slightly higher than county and state levels, as 37.5 percent of residents over the age of 25 have earned a bachelor's degree or higher.

Employment in the primary trade area favors the services sector (38.6 percent), followed by Retail Trade (26.0 percent) and Construction (7.9 percent). There are 7,255 employees within a 10-minute drive of the study area. These daytime consumers expend \$34.7 million annually before, after or during the workday.

The trade area's most prominent lifestyle group is "*Green Acres*," which represents 60.6 percent of households. These residents tend to live in rural enclaves in metropolitan areas. The median household income for this group of \$76,800 is markedly above the U.S. median. The median net worth is \$267,700, substantially more than the US median of \$93,300. In terms of occupation, office and administrative support employ the most workers in this group, followed by management. They are cautious consumers who focus on quality and durability.

Retail Category Definitions

Retail categories in the Supportable Retail Table correspond to the North American Industry Classification System (NAICS), the standard used by Federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. The following NAICS codes and definitions are provided by the U.S. Census Bureau:

Retail

Auto Supply Stores (4411): establishments known as automotive supply stores primarily engaged in retailing new, used, and/or rebuilt automotive parts and accessories, automotive supply stores that are primarily engaged in both retailing automotive parts and accessories and repairing automobiles; establishments primarily engaged in retailing and installing automotive accessories; and establishments primarily engaged in retailing new and/or used tires and tubes or retailing new tires in combination with automotive repair services.

Furniture Stores (4421): establishments primarily engaged in retailing new furniture, such as household furniture (e.g., baby furniture box springs and mattresses) and outdoor furniture; office furniture (except those sold in combination with office supplies and equipment); and/or furniture sold in combination with major appliances, home electronics, home furnishings and/or floor coverings.

Home Furnishings Stores (4422): establishments primarily engaged in retailing new home furnishings (except furniture).

Electronics and Appliance Stores (4431): establishments primarily engaged in retailing the following new products: household-type appliances (refrigerator, dishwasher, oven), cameras, computers/software, televisions and other electronic goods.

Hardware Stores (4441): establishments primarily engaged in retailing new building materials and supplies (lumber, plumbing, electrical, tools, housewares, hardware, paint, and wallpaper).

Lawn and Garden Supply Stores (4442): establishments primarily engaged in retailing new lawn and garden equipment and supplies. (Nursery, farm and garden products, outdoor power equipment).

Grocery Stores (4451): establishments primarily engaged in retailing a general line of food products (canned/frozen food, fruits and vegetables, meat, fish, poultry, milk, bread, eggs, soda).

Specialty Food Stores (4452): establishments primarily engaged in retailing specialized lines of food (meat, fish/seafood, fruits/vegetables, baked goods, candy, nuts, confections, popcorn, ice cream, items not made on the premises).

Beer, Wine, and Liquor Stores (4453): establishments primarily engaged in retailing packaged alcoholic beverages, such as ale, beer, wine and liquor.

Health & Personal Care Stores (4461): establishments primarily engaged in retailing health and personal care products (pharmacies/drug stores, first aid, beauty products, household supplies, candy, prepackaged snacks, optical goods, vitamins/supplements).

Clothing stores (4481): men's and boys' clothing stores; women's and girls' clothing stores; children's and infants' clothing stores; family clothing stores; clothing accessories stores.

Shoe Stores (4482): Shoes (men's, women's, child/infant, athletic).

Jewelry Stores (4483): Jewelry, luggage, and leather goods (silverware, watches, clocks, handbags, briefcases, belts, gloves).

Sporting Goods Stores (4511): establishments primarily engaged in retailing new sporting goods (fitness equipment, bikes, camping, uniforms and footwear).

Book & Music Stores (4512): establishments primarily engaged in retailing new books, newspapers, magazines, and prerecorded audio and video media.

Department Stores (4521): establishments known as department stores primarily engaged in retailing a wide range of the following new products with no one merchandise line predominating: apparel; furniture; appliances and home furnishings; and selected additional items, such as paint, hardware, toiletries, cosmetics, photographic equipment, jewelry, toys and sporting goods. Merchandise lines are normally arranged in separate departments. **General Merchandise Stores** (4529): establishments primarily engaged in retailing new goods in general merchandise stores (except department stores) (warehouse clubs, supercenters, apparel, auto parts, dry goods, hardware, groceries, housewares, no line predominating).

Florists (4531): establishments known as florists primarily engaged in retailing cut flowers, floral arrangements, and potted plants purchased from others. These establishments usually prepare the arrangements they sell.

Office Supplies & Gift Stores (4532): establishments primarily engaged in one or more of the following: (1) retailing new stationery, school supplies, and office supplies; (2) retailing a combination of new office equipment, furniture, and supplies; (3) retailing new office equipment, furniture, and supplies in combination with retailing new computers; and (4) retailing new gifts, novelty merchandise, souvenirs, greeting cards, seasonal and holiday decorations and curios.

Miscellaneous Retailers (4539): establishments primarily engaged in retailing new miscellaneous specialty store merchandise (except motor vehicle and parts dealers; furniture and home furnishings stores; consumer-type electronics and appliance stores; building material and garden equipment and supplies dealers; food and beverage stores; health and personal care stores; gasoline stations; clothing and clothing accessories stores; sporting goods, hobby, book, and music stores; general merchandise stores; florists; office supplies, stationery, and gift stores; and used merchandise stores). Pet supplies, art dealers, manufactured home dealers, tobacco/cigar stores,

Restaurants

Full-Service Restaurants (7221): establishments primarily engaged in providing food services to patrons who order and are served while seated (i.e., waiter/waitress service) and pay after eating. Establishments that provide these types of food services to patrons with any combination of other services, such as carryout services are classified in this industry.

Limited-Service Restaurants (7222): establishments primarily engaged in providing food services where patrons generally order or select items and pay before eating. Most establishments do not have waiter/waitress service, but some provide limited service, such as cooking to order (i.e., per special request), bringing food to seated customers, or providing off-site delivery (cafeterias, snack/ juice bar, ice cream/soft serve shops, cookie shops, popcorn shops, donut shops, coffee shops, bagel shops).

Special Food Services (7223): establishments primarily engaged in providing one of the following food services (2) a location designated by the customer; or (3) from motorized vehicles or non-motorized carts.

- Food Service Contractors: Establishments may be engaged in providing food services at institutional, governmental, commercial, or industrial locations of others based (cafeteria, restaurant, and fast food eating-place) on contractual arrangements with these types of organizations for a specified period of time. Management staff is always provided by the food services contractor.
- Caterers: providing single event-based food services. These establishments generally have equipment and vehicles to transport meals and snacks to events and/or prepare food at an off-premise site. Banquet halls with catering

staff are included in this industry. Examples of events catered by establishments in this industry are graduation parties, wedding receptions, business or retirement luncheons and trade shows.

 Mobile Food Services: establishments primarily engaged in preparing and serving meals and snacks for immediate consumption from motorized vehicles or non-motorized carts. The establishment is the central location from which the caterer route is serviced, not each vehicle, or cart. Included in this industry are establishments primarily engaged in providing food services from vehicles, such as hot dog carts and ice cream trucks.

Drinking Places (Alcoholic Beverages) (7224): establishments primarily engaged in preparing and serving alcoholic beverages for immediate consumption (bars, taverns, nightclubs).

Shopping Center Definitions

This study utilizes the shopping centers typologies defined by the International Council of Shopping Centers (ICSC) as follows:

- Convenience Centers: Convenience centers are 30,000 sf or less, unanchored, and generally will service a trade area of up to one mile. These centers include banking, carryout foods, florists, mail centers, small restaurants, small food markets, and professional services such as real estate and financial consulting. The centers typically include six to eight businesses.
- Neighborhood Centers: Neighborhood centers are anchored with a full-sized supermarket and typically range from 60,000 to 100,000 sf. They service a trade area of two to three miles and can include apparel, banks, carryout food, hardware, mail centers, restaurants, sporting goods and professional services such as financial consulting and real estate.
- Community Centers: Community centers typically range from 150,000 to 300,000 sf and are almost always anchored with a full-sized department store. They also include junior anchor retailers selling books, crafts, shoes, and sporting goods. Community centers often include large home improvement stores and medium-sized discount apparel stores. Their service area is typically five to seven miles in suburban locations.
- Lifestyle Centers: Lifestyle centers average 150,000 to 200,000 sf and feature popular apparel, book, and home furnishing stores, as well as cinemas and a wide selection of themed restaurants. The centers are frequently planned as walkable areas with main streets. Recently, lifestyle centers have included large anchors such as department stores, public libraries, and supermarkets. These centers typically have a trade area of four to six miles when developed in suburban settings. Lifestyle centers that include civic, employment, and residential buildings along with the retail land use are defined as 'town centers.'
- **Regional Centers:** Regional centers average trade areas of eight to 12 miles and are anchored with multiple department stores. The centers can range from 800,000 to 1,500,000 sf, and often include cinemas along with 200,000 sf of national brand fashion.

Rationale

The rationale for this study's findings are as follows:

- **Strong demographics**: Incomes of those within Hartland Township's primary trade area far exceed county and state levels.
- Favorable geographic location/regional access: The primary trade area benefits from being centrally located between Ann Arbor, Lansing, Detroit and Flint. Also, the area is well connected by US 23 and M-59.
- Impact of new Emagine Theater: The new state-of-the-art Emagine Theater will draw a significant number of visitors to Hartland Township, increasing the demand for retail and especially restaurants.
- Hartland Towne Center: The proposed and approved Hartland Town Center 300,000 expansion, including its proposed 125,000 sf anchor will increase Hartland's trade area and induce additional commercial demand for the township.

Limits of Study

The findings of this study represent GPG's best estimates for the amounts and types of additional retail and restaurants that are supportable in Hartland Township. Every reasonable effort has been made to ensure that the data contained in this study reflect the most accurate and timely information possible and are believed to be reliable. This study is based on estimates, assumptions, and other information developed by GPG independent research effort, general knowledge of the industry, and consultations with the client and its representatives. This study is designed as objective third-party research and GPG does not recommend that any or all of the supportable retail be developed in the study area.

No responsibility is assumed for inaccuracies in reporting by the client, its agent and representatives or in any other data source used in preparing or presenting this study. This report is based on information that was current as of January 1, 2019 and GPG has not undertaken any update of its research effort since such date.

This report may contain prospective financial information, estimates, or opinions that represent GPG's view of reasonable expectations at a particular time, but such information, estimates, or opinions are not offered as predictions or assurances that a particular level of income or profit will be achieved, that particular events will occur, or that a particular price will be offered or accepted.

The actual amounts of supportable retail could be significantly higher or lower depending on multiple market and not market variables including the type, design and quality of the new development. It is plausible that a walkable town center, with well-designed buildings and public realm, could draw visitors from beyond this study's estimated trade area boundaries and considerably outperform the site's location and limited market potential. This would require an extraordinary development team and retailer mix unique to the market, including anchor retailers. On the other hand, a poorly implemented commercial center or badly managed businesses could underperform the location.

Actual results achieved during the period covered by our prospective financial analysis may vary from those described in our report, and the variations may be material. Therefore, no warranty or

representation is made by GPG that any of the projected values or results contained in this study will be achieved.

This study should not be the sole basis for programming, planning, designing, financing, or development of any commercial center. This study is for the use of Hartland Township for general planning purposes only and is void for other locations and purposes.

End of Study

Gibbs Planning Group	Business Summary				
	PTA		Pr	Prepared by Esri	' Esri
	Area: 108.74 square miles				
Data for all businesses in area			2		
Total Employees:			8,137		
Total Residential Population:			36,311		
Employee/Residential Population Ratio (per 100 Residents)	(per 100 Residents)		22		
T: 05 0		les		jo y	Dercont
A griculture & M ining		56	6.0%	219	2.7%
Construction		126	13.5%	645	7.9%
M anufacturing		37	4.0%	603	7.4%
Transportation		23	2.5%	367	4.5%
Communication		7	0.8%	55	0.7%
Utility		4	0.4%	29	0.4%
Wholesale Trade		42	4.5%	401	4.9%
Retail Trade Summary		174	18.7%	2,112	26.0%
Home Improvement		23	2.5%	143	1.8%
Food Stores		1	1.8%	520	6.4%
Auto Dealers, Gas Stations, Auto Aftermarket	ermarket	6	2.0%	344	4.2%
Apparel & Accessory Stores			0.1%	2	0.0%
Fating & Drinking Places		7 σ	л 8%	830	10 2%2.U
Miscellaneous Retail		48	5.2%	228	2.8%
		i			
Finance, Insurance, Real Estate Summary	×	74	8.0%	349	4.3%
Banks, Savings & Lending Institutions		ಕೆದೆ	1.7%	124	1.5%
Securities Brokers		6 8	1.1%	21	0.3%
Insurance Carriers & Agents		30	3.2%	126	1.5%
Real Estate, Holding, Other Investment Offices	it Offices	с	2.0%	8/	1.0%
Services Summary		340	36.6%	3,143	38.6%
Hotels & Lodging		6	0.6%	126	1.5%
Automotive Services		7	1.8%	75	0.9%
Motion Pictures & Amusements		30	3.2%	435	5.3%
Health Services		46	4.9%	331	4.1%
		3 0	0.9%	17	10.0%
		3 5	22.270	13 15	10.00/
		Þ.	22.076	j, D	0.2.70
Government		61	1.3%	206	2.5%
Unclassified Establishments		35	3.8%	8	0.1%
Totals		930	100.0%	8,137	100.0%
Source: Copyright 2018 Infogroup	Source: Copylight 20% Infogroup, Inc. All rights reserved. Esin Total Residential Population forecasts for 20%.	tom area	0		

Appendix A1: Primary Trade Area Business Summary

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	ent & Supplies Dealers ss Stores M usic Stores ts & Other Financial ctivities; Funds, Trusts & Other ctivities mines M anagement & Remediation M anagement & Remediation	Gasoline Stations Clothing & Clothing A ccessories Spot Goods, Hobby, Book, & MI General M erchandise Stores M Iscellaneous Store Retailers Nonstore Retailers Transportation & Warehousing Information Finance & Insurance Central Bank/Credit Intermediatio Securities, Commodity Contracts Insurance Carliers & Related Actit Real Estate, Rental & Leasing Professional, Scientific & Tech Serv Legal Services Management of Companies & Enter Administrative & Support & Waste M Educational Services Accommodation & Food Services Accommodation & Food Services Other Services (except Public Admin Automotive (except Public Admin Automotives (except Public Admin Autoministration
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	ent & Supplies Dealers	Gasoline Stations
	ent & Supplies Dealers	
	ent & Supplies Dealers	Health & Personal Care Stores
	ent & Supplies Dealers	Food & Beverage Stores
		Bldg Material & Garden Equipment & Supplies Dealers
		Electronics & Appliance Stores
	Stores	Furniture & Home Furnishings Stores
		Motor Vehicle & Parts Dealers
		Retail Trade
		Wholesale Trade
		Manufacturing
		Construction
		Utilities
		Mining
	nting	A griculture, Forestry, Fishing & Hunting
		by NAICS Codes
8.74 square miles	Area: 108.74 square miles	
	PTA	
Business Summary		Gibbs Planning Group

Appendix A2: Primary Trade Area Business Summary

Appendix B1: Primary Trade Area Community Profile

Gibbs	Planning	Group

Community Profile

Prepared by Esri

Area: 108.74 square miles

ΡΤΑ

Population Summary	
2000 Total Population	
2010 Total Population	
2018 Total Population	
2018 Group Quarters	
2023 Total Population	
2018-2023 Annual Rate	
2018 Total Daytime Population	
Workers	
Residents	
Household Summary	
2000 Households	
2000 Average Household Size	
2010 Households	
2010 Average Household Size	
2018 Households	
2018 Average Household Size	
2023 Households	
2023 Average Household Size	
2018-2023 Annual Rate	
2010 Families	
2010 Average Family Size	
2018 Families	
2018 Average Family Size	
2023 Families	
2023 Average Family Size	
2018-2023 Annual Rate	
Housing Unit Summary	
2000 Housing Units	
Owner Occupied Housing Units	
Renter Occupied Housing Units	
Vacant Housing Units	
2010 Housing Units	
Owner Occupied Housing Units	
Renter Occupied Housing Units	
Vacant Housing Units	
2018 Housing Units	
Owner Occupied Housing Units	
Renter Occupied Housing Units	
Vacant Housing Units	
2023 Housing Units	
Owner Occupied Housing Units	
Renter Occupied Housing Units	
Vacant Housing Units	
Median Household Income	
2018	
2023	
Median Home Value	
2018	
2023	
Per Capita Income	
2018	
2023	
Median Age	
_ 2010	
2018	
2023	

Data Note: Household population includes persons not residing in group quarters. A verage Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1 Esri forecasts for 2018 and 2023 Esri converted Census 2000 data into 2010 geography.

Appendix B2: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

Area: 108.74 square miles

ΡΤΑ

Prepared by Esri

2018 Households by Income	
Household Income Base	12
<\$15,000	
\$15,000 - \$24,999	
\$25,000 - \$34,999	
\$35,000 - \$49,999	
\$50,000 - \$74,999	1
\$75,000 - \$99,999	1
\$100,000 - \$149,999	2
\$150,000 - \$199,999	
\$200,000+	
Average Household Income	\$107
2023 Households by Income	
Household Income Base	13
<\$15,000	r.
\$15,000 - \$24,999	
\$25,000 - \$34,999	
\$35,000 - \$49,999	
\$50,000 - \$74,999	
\$75,000 - \$99,999	1
\$100,000 - \$149,999	2
\$ 150,000 - \$ 199,999	1
\$200,000+	1
Average Household Income	\$128
2018 Owner Occupied Housing Units by Value	ψιζζ
Total	4
	1
<\$50,000	
\$50,000 - \$99,999 \$40,000 - \$440,000	
\$100,000 - \$149,999	
\$150,000 - \$199,999	
\$200,000 - \$249,999	1
\$250,000 - \$299,999	1
\$300,000 - \$399,999	1
\$400,000 - \$499,999	
\$500,000 - \$749,999	
\$750,000 - \$999,999	
\$1,000,000 - \$1,499,999	
\$1,500,000 - \$1,999,999	
\$2,000,000 +	
Average Home Value	\$29
2023 Owner Occupied Housing Units by Value	
Total	1
<\$50,000	
\$50,000 - \$99,999	
\$100,000 - \$149,999	
\$150,000 - \$199,999	
\$200,000 - \$249,999	1
\$250,000 - \$299,999	1
\$300,000 - \$399,999	2
\$400,000 - \$499,999	1
\$500,000 - \$749,999	
\$750,000 - \$999,999	
\$1,000,000 - \$1,499,999	
\$1,500,000 - \$1,999,999	
\$2,000,000 +	
Average Home Value	\$333

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023 Esri converted Census 2000 data into 2010 geography.

Appendix B3: Primary Trade Area Community Profile

Gibbs	Plan	nina	Group
01000	i iain	in ig	Cicap

Community Profile

Prepared by Esri

PTA Area: 108.74 square miles

2010 Population by Age	
Total	34
0 - 4	5
5 - 9	7
10 - 14	8
15 - 24	12
25 - 34	8
35 - 44	14
45 - 54	18
55 - 64	1:
65 - 74	
75 - 84	:
85 +	
18 +	7:
2018 Population by Age	
Total	31
0 - 4	2
5 - 9	ł
10 - 14	
15 - 24	12
25 - 34	10
35 - 44	
45 - 54	16
55 - 64	16
65 - 74	10
75 - 84	:
85 +	
18 +	77
2023 Population by Age	
Total	37
0 - 4	
5 - 9	
10 - 14	
15 - 24	10
25 - 34	1
35 - 44	1
45 - 54	1:
55 - 64	16
65 - 74	12
75 - 84	
85 +	
18 +	79
2010 Population by Sex	
Males	17
Females	16
2018 Population by Sex	
Males	46
Females	18
2023 Population by Sex	61
	1
Males Females	
Feilidies	18

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023 Esri converted Census 2000 data into 2010 geography.

Appendix B4: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

Area: 108.74 square miles

ΡΤΑ

Prepared by Esri

Total	34,
White Alone	96
Black Alone	0
American Indian Alone	0
Asian Alone	0
Pacific Islander Alone	0
Some Other Race Alone	0
Two or More Races	
Hispanic Origin	2
Diversity Index	
2018 Population by Race/Ethnicity	
Total	36
White Alone	96
Black Alone	0
American Indian Alone	0
Asian Alone	0
Pacific Islander Alone	0
Some Other Race Alone	0
Two or More Races	·
Hispanic Origin	2
Diversity Index	
2023 Population by Race/Ethnicity	
Total	37
White Alone	95
Black Alone	C
American Indian Alone	C
Asian Alone	
Pacific Islander Alone	(
Some Other Race Alone	(
Two or More Races	2
Hispanic Origin	3
Diversity Index	
2010 Population by Relationship and Household Type	
Total	34
In Households	99
In Family Households	90
Householder	2
Spouse	23
Child	34
Other relative	2
Nonrelative	
In Nonfamily Households	Ş
In Group Quarters	C
Institutionalized Population	

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups. Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023 Esri converted Census 2000 data into 2010 geography.

Appendix B5: Primary Trade Area Community Profile

Community Profile

Gibbs Planning Group

PTA	Prepared by I
Area: 108.74 square miles	
2018 Population 25+ by Educational Attainment	
Total	25,31
Less than 9th Grade	1.2
9th - 12th Grade, No Diploma	3.7
High School Graduate	21.3
GED/Alternative Credential	2.4
Some College, No Degree	24.2
Associate Degree	9.7
Bachelor's Degree	24.0
Graduate/Professional Degree	12.9
2018 Population 15+ by Marital Status	12
Total	29,8
Never Married	20,0
Married	62,4
Widowed	4.3
Divorced	9.3
2018 Civilian Population 16+ in Labor Force	0
Civilian Employed	97.0
Civilian Unemployed (Unemployment Rate)	3.0
2018 Employed Population 16+ by Industry	0.0
Total	19,6
Agriculture/Mining	1.0,0
Construction	9.0
Manufacturing	18.8
Wholesale Trade	2.9
Retail Trade	10.6
Transportation/Utilities	3.4
Information	1.6
Finance/Insurance/Real Estate	5.9
Services	43.8
Public Administration	2.9
2018 Employed Population 16+ by Occupation	
Total	19,6
White Collar	63.6
Management/Business/Financial	18.5
Professional	22.5
Sales	11.
Administrative Support	11.5
Services	14.8
Blue Collar	21.6
Farming/Forestry/Fishing	0.2
Construction/Extraction	6.1
Installation/Maintenance/Repair	4.2
Production	6.7
Transportation/Material Moving	4.4
2010 Population By Urban/ Rural Status	
Total Population	34,2
Population Inside Urbanized Area	50.0
Population Inside Urbanized Cluster	0.0
Rural Population	50.0

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023 Esri converted Census 2000 data into 2010 geography.

Appendix B6: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

Area: 108.74 square miles

ΡΤΑ

Prepared by Esri

2010 Households by Type	
Total	
Households with 1 Person	
Households with 2+ People	
Family Households	
Husband-wife Families	
With Related Children	
Other Family (No Spouse Present)	
Other Family with Male Householder	
With Related Children	
Other Family with Female Householder	
With Related Children	
Nonfamily Households	
All Households with Children	
Multigenerational Households	
Unmarried Partner Households	
Male-female	
Same-sex	
2010 Households by Size	
Total	
1 Person Household	
2 Person Household	
3 Person Household	
4 Person Household	
5 Person Household	
6 Person Household	
7 + Person Household	
2010 Households by Tenure and Mortgage Status	
Total	
Owner Occupied	
Owned with a Mortgage/Loan	
Owned Free and Clear	
RenterOccupied	
2010 Housing Units By Urban/ Rural Status	
Total Housing Units	
Housing Units Inside Urbanized Area	
Housing Units Inside Urbanized Cluster	
Rural Housing Units	

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parentchild relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023 Esri converted Census 2000 data into 2010 geography.

Appendix B7: Primary Trade Area Community Profile

Gibbs Planning Group

Community Profile

PTA Area: 108.74 square miles

7	1.	Green Acres
F	2.	Soccer Moms
*	3.	Savvy Suburbanite
2018 Consumer Spending	•	
Apparel & Services: Total \$		\$35,411
Average Spent		\$2,73
Spending Potential Index		ψ=,
Education: Total \$		\$24,733
Average Spent		\$1,90
Spending Potential Index		• 7 • •
Entertainment/Recreation: Total\$		\$53,424
Average Spent		\$4,12
Spending Potential Index		
Food at Home: Total \$		\$80,570
Average Spent		\$6,21
Spending Potential Index		
Food Away from Home: Total \$		\$57,480
Average Spent		\$4,43
Spending Potential Index		
Health Care: Total \$		\$96,246
Average Spent		\$7,42
Spending Potential Index		
HH Furnishings & Equipment: Total \$		\$35,125
Average Spent		\$2,70
Spending Potential Index		
Personal Care Products & Services: Total	\$	\$13,879
Average Spent		\$1,07
Spending Potential Index		
Shelter: Total\$		\$267,159
Average Spent		\$20,60
Spending Potential Index		
Support Payments/Cash Contributions/Gi	ifts in Kind: Total \$	\$40,917
Average Spent		\$3,15
Spending Potential Index		
Travel: Total \$		\$36,900
Average Spent		\$2,84
Spending Potential Index		
Vehicle Maintenance & Repairs: Total \$		\$17,666
Average Spent Spending Potential Index		\$1,36

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.

Source: Consumer Spending data are derived from the 2015 and 2016 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri. Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2018 and 2023 Esri converted Census 2000 data into 2010 geography.

Prepared by Esri

Appendix C1: Primary Trade Area Housing Profile

Gibbs Planning Group

Housing Profile

ΡΤΑ

Area: 108.74 square miles

Prepared by Esri

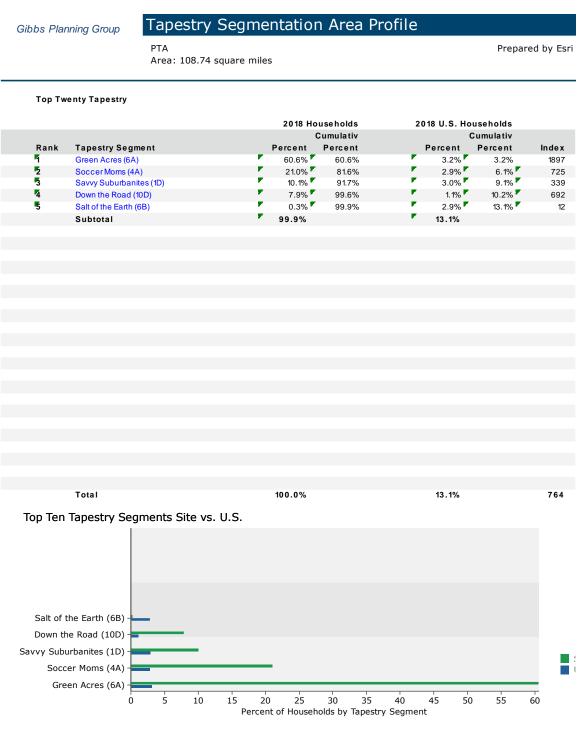
Population			Househo	lds			
2010 Total Population	34,204		2018 Media	an Household Ir	ncome		\$88,8
2018 Total Population	36,311		2023 Medi	ian Household II	ncome		\$102,26
2023 Total Population	37,862		2018-2023	3 Annual Rate			2.85%
2018-2023 Annual Rate	0.84%						
		Census	0.10	2018		2023	
Housing Units by Occupancy Status a	ind Tenure	Number	Percent	Number	Percent	Number	Percei
Total Housing Units		12,940	100.0%	13,835	100.0%	14.477	100.0
Occupied		12.133	93.8%	12,965	93.7%	13.556	93.6
Owner		10,965	84.7%	11,638	84.1%	12,214	84.4
Renter		1,168	9.0%	1,327	9.6%	1,342	9.3
Vacant		807	6.2%	870	6.3%	921	6.4
				2018		2023	
Owner Occupied Housing Units by Va	lue			Number	Percent	Number	Percei
Total				11,639 🔽	100.0%	12,214	100.0
<\$50,000				879	7.6%	631	5.2
\$50,000-\$99,999				351	3.0%	238	1.9
\$100,000-\$149,999				594	5.1%	354	2.9
\$150,000-\$199,999				1,411	12.1%	1,054	8.6
\$200,000-\$249,999				1,936	16.6%	1,779	14.6
\$250,000-\$299,999				1,844	15.8%	2,015	16.5
\$300,000-\$399,999				2,314	19.9%	2,680	21.9
\$400,000-\$499,999				1,325	11.4%	2,106	17.2
\$500,000-\$749,999				822	7.1%	1, 15 1	9.4
\$750,000-\$999,999				24	0.2%	38	0.3
\$1,000,000-\$1,499,999				121	1.0%	147	1.2
\$1,500,000-\$1,999,999				18	0.2%	21	0.2
\$2,000,000+				0	0.0%	0	0.0
Median Value				\$267,584		\$301,343	
Average Value				\$295,199		\$333,679	
Census 2010 Housing Units					Nu	mber	Percer
Total						12,940 🗖	100.0
						0.400	50.0
In Urbanized Areas						6,498	5U.Z
In Urbanized Areas In Urban Clusters						6,498 0	50.2° 0.0'

Data Note: Persons of Hispanic Origin may be of any race. Source: U.S. Census Bureau, Census 2010 Summary File 1.

Appendix C2: Primary Trade Area Housing Profile

ibbs Planning Group	Housing Profile			
	PTA Area: 108.74 square miles		Pi	repared by E
Census 2010 Owner O	ccupied Housing Units by Mortgage Status		Number	Percen
Total			10,964 🍢	100.04
Owned with a Mort	gage/Loan		8,540	77.9
Owned Free and C	lear		2,424	22.1
Census 2010 Vacant Hous	ing Units by Status			
			Number	Percer
Total			800	100.0
ForRent			100	12.5
Rented- Not Occu	pied		4	0.5
For Sale Only			260	32.5
Sold - Not Occupie	ed		47	5.9
Seasonal/Recreat	ional/Occasional Use		237	29.6
For Migrant Worker	S		0	0.0
Other Vacant			152	19.0
Census 2010 Occupie	d Housing Units by Age of Householder and	Home Ownership		
			Owner Occup	
		Occupied	Number %	6 of Occupie
Total		12,132	10,964	90.4
15-24		166	85	51.2
25-34		1,056	822	77.8
35-44		2,544	2,248	88.4
45-54		3,457	3,201	92.6
55-64		2,574	2,443	94.9
65-74		1,487	1,408	94.7
75-84		622	578	92.9
85+		226	179	79.2
Census 2010 Occupied Ho	using Units by Race/Ethnicity of Householder and Ho	me Ownership		
			Owner Occup	oied Units
		Occupied	Number %	6 of Occupie
Total		12,133	10,965	90.4
White Alone		11,846	10,720	90.5
Black/African Ame	rican	53	45	84.9
American Indian/A	aska	42	37	88.1
Asian Alone		73	63	86.3
Pacific Islander Ald	ne	4	3	75.0
Other Race Alone		26	19	73.1
Two or More Races	5	89	78	87.6
Hispanic Origin		155	128	82.6
	d Housing Units by Size and Home Ownershi		i LO	02.0
			Owner Occup	
		Occupied		6 of Occupie
Total		12,133	10,965	90.4
1- Person		2,046	1,680	82.1
2-Person		4,262	3,947	92.6
3-Person		2,155	1,965	91.2
4-Person		2,150	1,985	92.3
5-Person		994	917	92.3
6-Person		353	316	89.5
7+Person		173	155	89.6
				2010

Data Note: Persons of Hispanic Origin may be of any race. Source: U.S. Census Bureau, Census 2010 Summary File 1.



Appendix D1: Primary Trade Area Dominant Tapestry Descriptions

Data Note: This report identifies neighborhood segments in the area, and describes the socioeconomic quality of the immediate neighborhood. The index is a comparison of the percent of households or Total Population 18+ in the area, by Tapestry segment, to the percent of households or Total Population 18+ in the United States, by segment. An index of 100 is the US average.



LifeMode Group: Cozy Country Living Green Acres

Households: 3,923,400

Average Household Size: 2.70

Median Age: 43.9

Median Household Income: \$76,800

WHO ARE WE?

The Green Acres lifestyle features country living and self-reliance. They are avid do-it-yourselfers, maintaining and remodeling their homes, with all the necessary power tools to accomplish the jobs. Gardening, especially growing vegetables, is also a priority, again with the right tools, tillers, tractors, and riding mowers. Outdoor living also features a variety of sports: hunting and fishing, motorcycling, hiking and camping, and even golf. Self-described conservatives, residents of *Green Acres* remain pessimistic about the near future yet are heavily invested in it.

OUR NEIGHBORHOOD

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- Rural enclaves in metropolitan areas, primarily (not exclusively) older homes with acreage; new housing growth in the past 15 years.
- Single-family, owner-occupied housing, with a median value of \$235,500.
- An older market, primarily married couples, most with no children.

SOCIOECONOMIC TRAITS

- Education: More than 60% are college educated.
- Unemployment is low at 3.8% (Index 70); labor force participation rate is high at 66.8% (Index 107).
- Income is derived not only from wages and salaries but also from self-employment (more than 13% of households), investments (27% of households), and increasingly, from retirement.
- They are cautious consumers with a focus on quality and durability.
- Comfortable with technology, more as a tool than a trend: banking or paying bills online is convenient; but the Internet is not viewed as entertainment.
- Economic outlook is professed as pessimistic, but consumers are comfortable with debt, primarily as home and auto loans, and investments.

Note: The Index represents the notic of the segment rate to the US rate multiplied by 100. Consumer prelemences are estimated from data by GRCMR.

EGMENTATIO esri.com/tapestry



6A

Appendix E: Focus Group Summaries

As part of its research for this market study, GPG led six in-person focus groups with Hartland residents. The six distinct groups were (1) young families, (2) empty nesters, (3) business owners, (4) restaurant owners/managers, (5) Township department heads and (6) the chamber of commerce. The following summarizes the feedback received from each focus group.

Group #1: Young Families

These women travel to Fenton, Brighton and Howell to eat out. Fenton is their favorite, as most feel Brighton is too large. They complained that very few places in Hartland are open after 10 pm. This group would like more family friendly restaurants, such as Panera Bread or Chipotle. All these women would like Panera Bread or an independently owned coffee shop because it would provide a social setting for moms to meet. They really do not want another fast food restaurant (they are fairly health conscious). They feel Black Rock is too expensive. Most eat dinner out once a week.

They shop at Trader Joes and Aldi in Brighton, and almost of these focus group participants would like those in Hartland. In Hartland, many regularly shop at Meijer. Most also like the Target for day-to-day necessities, and many purchase their clothes at Target. Target is much preferred over Walmart (they believe Target has higher quality products). Many also shop at Green Oaks in Howell for major purchases, but no one reported going to 12 Oaks Mall. They are very price conscious and most shop online weekly (Amazon and Target).

There was general agreement concerning what additional retail is most needed. They would most like a Home Depot, lumber store (many reported doing home remodeling), Menards (which is currently 20 minutes away), sports store (focused on hunting and fishing), more sit-down restaurants, quaint independently owned shops and an ice cream parlor to go after their children's sporting events. This group strongly emphasized that they want Hartland to maintain its local character. They are proud of their sense of community and excellent schools.

Lastly, this group complained about the Township's dirt roads (which they said cannot handle large amounts of traffic) and that there are no places to rent out for events like birthday parties.

Group #2: Empty Nesters

This older group reported eating out multiple times a week at sit-down restaurants as far away as Plymouth. For groceries, they greatly prefer Hartland's Meijer to Kroger. Busch's in Brighton is popular with this group (they like the variety), and they prefer Target to Walmart (which they think is low-end). They hardly ever go to Twelve Oaks (mainly because of traffic congestion), and more often frequent the Tanger outlet mall in Howell. Almost all participants in this focus group regularly shop on-line because they claim that there are not enough stores in Hartland.

These empty nesters identified many specific restaurants and retailers that they would like in Hartland. They would like more restaurant choices, particularly Italian and Chinese sit-down restaurants. Although they expressed reservations about introducing too many chain restaurants to Hartland, most would like a Mongolian BBQ, Cheesecake Factory and Panera Bread (which would offer a relaxing venue to sit and socialize). Several in this group complained that the Township currently has too many pizza restaurants. In terms of retailers, they would like a Trader Joes, Whole Foods, Aldi, Menards and Gandy Dancy. the Township cannot attract Trader Joes or Whole Foods, they would like another grocer with a fresh deli and seating area. Several also stated that they would like more specialty shops in the Village, and the men expressed a desire for a Home Depot or Lowes (most currently shop in Fenton for building supplies).

Almost everyone in this group said that they plan to stay in Hartland. They want Hartland to remain a quaint community and are opposed to large signage. Most desire Hartland to more closely resemble Milford.

Group #3: Business Owners

This group reported that the commercial absorption rate in Hartland is very slow (compared to Brighton, Fenton and Milford). They believe that the Township needs more restaurants and that big box stores (such as Best Buy and Dicks Sporting Goods) would do well. However, they believe Home Depot/Lowes is not realistic because there are many of these large home improvement stores in neighboring cities. According to this group, Walmart closed in Hartland because it "wasn't in vogue."

These business owners are optimistic that the new cinema will attract more restaurants. However, they noted several factors that hold the city back. These were parking (or lack thereof), strict development codes (signage, building materials, landscape regulations, colors, etc.) and insufficient office demand.

Group #4: Restaurant Owners

This focus group was composed of three restaurant owners. None of these owners get much lunch business during the workweek, but they all get larger dinner crowds and are busy on weekends. All members of this focus group said that they are meeting sales goals, and each believes that their restaurants' trade area is roughly 5 miles.

There was a consensus that there is room for more restaurants. According to this group, a lot of new restaurant development is in the pipeline, but there is only one more liquor license left. However, many restaurants do not want to come to Hartland because of the dismal lunch traffic. This occurs because residents drive a long way to work, and there are no major offices in Hartland.

There was also a consensus that the development codes are too restrictive. Building a restaurant in Hartland is very expensive because building codes require 100% brick and stone. This, combined with little lunch traffic, deters more restaurants from opening.

Lastly, this group expressed strong views concerning residential development. They all believe that more residential development is needed to attract businesses. However, they acknowledged that many people in the Township oppose more residential development.

Group #5: Township Department Heads

This group told us that there are few requests from retailers to come to Hartland. In response to why the village is not more developed, they offered the following explanations: 1) traffic doesn't route you down to the village center, 2) money isn't here to invest, 3) homes in the village are not as expensive so residents may not be able to support retail, 4) not enough space in the village to establish a viable shopping district.

In contrast to the restaurant owners, the Township's planning director does not think the regulations are driving businesses away. His position is that Hartland's building standards are not much more restrictive than that of its neighbors.

According to these department heads, Hartland's Walmart closed because it was built at the same time as Meijer and the township could not support two such stores. Also, the Meijer in Hartland is very well run and has many loyal customers.

Lastly, the demographics of the Township were discussed. The Township's demographic profile shows that its residents have money, but this group agrees that residential density is just too low. However, they are very optimistic about the new Emagine Theater. They stated that it will attract many more businesses once it becomes a destination, which they think will happen quickly.

Group #6: Chamber of Commerce

This group reiterated the need for more diverse restaurant offerings and stressed their dislike of chains. There was a consensus that a strong demand exists for higher-end sit-down restaurants (like Blackrock). Some even noted hour-long waits at Blackrock on the weekends. Because there are a lack of restaurants options in Hartland, all members of this group regularly travel to Fenton, Howell, Milford or Brighton to eat out. In general, this group strongly prefers local restaurants that give back to the community.

In terms of retail, these members thought the Township could use a unique gift shop and local boutique sports shop. They expressed a strong preference for small boutique/specialty stores. They do not think Hartland can support a Costco or Home Depot, particularly since these are in close neighboring communities.

They want a quaint downtown and a city center in the village, but this may not be feasible because there are no buildings currently available. They believe high building standards are important to attract the right type of retailers.

Lastly, there were some discussions related to affordability in Hartland. According to some participants of this group, there is virtually no residential stock available for less than \$200k. Therefore, many younger people are leaving the Township. However, the older demographic is staying.



HARTLAND TOWNSHIP

2020-2021 Comprehensive Plan Amendment

Adopted by the Hartland Township Board on _____ Approved by the Planning Commission on _____

> This document replaces the 2015 Comprehensive Plan Amendment pages 74 through 88 of the

2004 HARTLAND TOWNSHIP COMPREHENSIVE PLAN

Adopted _____

Amendment Prepared by:

Hartland Township Planning Commission Hartland Township Planning Department

utilizing technical information provided by:

Zimmerman/Volk Associates, Inc. Gibbs Planning Group, Inc.

ACKNOWLEDGEMENTS

HARTLAND TOWNSHIP BOARD OF TRUSTEES

William Fountain, Supervisor Larry Ciofu, Clerk Kathleen Horning, Treasurer Matthew Germane Summer L. McMullen Denise M. O'Connell Joseph Petrucci Robert West – Township Manager

HARTLAND TOWNSHIP PLANNING COMMISSION

Larry Fox, Chair Mike Mitchell, Vice Chair Keith Voight, Secretary Joe Colaianne, Township Board Liaison Sue Grissim Michelle LaRose Tom Murphy

Troy Langer – Planning Director

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FUTURE LAND USE PLAN

INTRODUCTION

The Future Land Use Plan is the central element of a Comprehensive Plan. It represents an integration of all plan components and analysis by translating them into a future land use program that communicates the goals for various uses and purposes, and graphically portrays their future locations and interrelationships. The Future Land Use Map, the graphic representation, should ultimately reflect the community's vision for the future and illustrate how residents would like their community to function over the ensuing years.

In the case of an amendment to an existing Comprehensive Plan such as this, the base information contained in the document is generally accepted as still largely valid, with a determination that review of only certain components is warranted. Factors that are typically considered when amending a Future Land Use Plan include: 1) a review of existing land use patterns, 2) an evaluation of infrastructure availability, 3) consideration of population projections or specific characteristics of the regional market, 4) pending development projects, 5) land use goals and economic development objectives, and 5) an evaluation of the physical characteristics in terms of opportunities and constraints.

The leadership of Hartland Township, in an effort to encourage new residential growth and the corresponding economic development after enduring several years of recession, determined that it was in the Township's best interest to undertake a targeted analysis of the Township's residential market. This was done with the ultimate purpose of positioning itself to capture new residential construction as the regional housing development begins to expand. The results of the market study would then be used as a basis for reevaluating the Comprehensive Plan, specifically the adequacy of the various residential land use categories. Although this was recognized as a unique approach to a Comprehensive Plan amendment, it was deemed an effective interim measure considering that a full update was on the horizon.

At the request of the Township, the firm of Zimmerman/Volk Associates, Inc. conducted a target market analysis resulting in the document entitled: <u>An Analysis of Residential Market Potential for Hartland</u> <u>Township</u> and dated August 2014. This document was used, as intended, as a key resource in the 2015 Comprehensive Plan amendment and is hereby incorporated by reference.

Also, the Township Board had selected Gibbs Planning Group, Inc. to conduct a retail market analysis for Hartland Township, entitled: <u>*Retail Market Analysis Hartland Township, Michigan*</u> and dated April 10, 2019. This document was used and is intended as a key resource in the 2020-2021 Comprehensive Plan amendment and is hereby incorporated by reference.

OVERVIEW OF HARTLAND TOWNSHIP

The summary that follows is an excerpt from <u>An Analysis of Residential Market Potential for Hartland</u> <u>Township</u> as contained within the **Overview of Hartland Township**.

Hartland Township is situated on the eastern edge of Livingston County, encompassing approximately 37.7 square miles, and bordered by Tyrone Township to the north, Highland Township in Oakland County to the east, Brighton Township to the south, and Oceola Township to the west. The Township was established at the same time as the County, in 1836, and much of its growth is attributable to the Crouse family, with the arrival of the Crouse brothers, Robert and Chauncey, in 1842. Hartland Township is located approximately 10 miles north of the City of Brighton and approximately 10 miles east of the City of Howell. The City of Ann Arbor lies 26 miles south of the Township via U.S. 23 South and Detroit is 51 miles southeast of Hartland Township via U.S. 23 South, Interstates 96 and 696, and the John C. Lodge Freeway. Lansing, the State capitol, is reached via West Highland Road (M-59), Interstate 96 and Interstate 496.

Two major thoroughfares intersect in Hartland Township: M-59, which crosses the Township in an east-west direction, linking Interstate 96 in Howell and Interstate 94 in the east; and U.S. 23 which, on its way from Jacksonville, Florida to Mackinaw City, crosses the Township in a north-south direction. One other road, Clyde Road, traverses the entire Township from east to west, and it is a gravel road west of U.S. 23. Only one other road, Fenton Road/North Pleasant Valley Road, runs from beyond the Township's northern border to beyond the Township's southern border and it turns to gravel north of Lone Tree road. Livingston County has jurisdiction over 94 of the 106 miles of public roads in the Township and 37 of those 94 miles are unpaved.

The nearest airport is Bishop International Airport, located in Flint, 24 miles from Hartland Township, accommodating domestic flights and some flights to Canada. Offering similar service is the Capital Regional International Airport in Lansing, 54 miles away. The largest airport, approximately 51 miles from Hartland, is Detroit Metropolitan Wayne County Airport, a Delta Airlines hub, with domestic and international service provided by a variety of airlines.

The principal settlement in Hartland Township is the Township's historic downtown, Hartland Village, which flanks Avon Road/Hartland Road north of Crouse Road. The Village is home to several important Township institutions: the Florence B. Dearing Museum, the Hartland Music Hall, the United States Post Office, the Cromaine Village Library, the Hartland Village Cemetery, as well as historic churches, residences, shops, eateries, and small businesses, and the Hartland Village Elementary School on Hibner Road. The Hartland Township Fire Hall, Hartland High School, Hartland Middle School, and the Creekside Elementary School are all located off Hartland Road south of the Village.

Hartland Township Hall and the 100-acre Hartland Settlers Park are located on Clark Road; Hartland Heritage Park, which includes 10 sports fields for football, lacrosse, and soccer, is found on Highland Road west of Fenton Road. Multiple lakes and waterways are situated throughout the Township; Lake Walden is site of the Waldenwoods Family Recreation Resort and the 27-hole Majestic at Lake Walden Golf Course and Jerry Matthews driving range. The Township is also home to the 36-hole Hartland Glen Golf Course and driving range located south of Highland Road and to the Dunham Hills golf club on Dunham Road.

Parshallville is a smaller settlement only partially located in Hartland Township and is the site of the Parshallville Cider Mill (formerly Tom Walker's Grist Mill), a 136-year-old water-powered mill, which during the autumn produces and sells cider, apples and related foodstuffs.

The central business district in Hartland Township is now found in and around the intersections of M-59 (Highland Road) with Old U.S. Highway 23, U.S. 23, and Hartland Road. This area includes two major grocery stores, Meijer and Kroger, a Walmart Supercenter, and a Target store, which anchor shopping centers featuring national, local and regional tenants, ranging from restaurants, coffee shops, beauty parlors, a Best Western, to multiple other purveyors of goods and services.

Based on past demographic trends, the Nielsen Company, a respected provider of Census-based demographic data, estimates that the Township's population reached 15,055 persons in 2014, up from 14,663 persons as of the 2010 Census, an increase of almost 2.7%. That growth was in addition to the gain of more than 3,360 persons between the 2000 Census and the 2010 Census. Nielsen projects that the

Township's population will climb to 15,450 persons by 2019, an increase of over 2.6% over the next five years.

There were 3,698 households in Hartland Township as of the 2000 Census, rising to 5,154 households by the 2010 Census. Between 2014 and 2019, the number of households is projected to increase from 5,286 to 5,426 households. The 2019 projection represents household growth of more than 46% since the year 2000.

The number of persons per household has a significant impact on the type of housing required by households living in the Township.

- Just under 51% of all households currently living in Hartland Township contain just one or two persons (almost nine percentage points below the national share of 59.5%).
- 17.9% contain three persons (compared to the national share of 16.2%).
- The remaining 31.4% contain four or more persons (24.3% nationally).

The composition of those households can also affect the type of housing required and influence housing preferences.

- Approximately a third of the Township's households can be characterized as traditional families, e.g. married couples with children under age 18 (21.8% nationally).
- Non-traditional families with children, e.g. single persons with children under 18, represent less than 8% of the Township's households (11.7% nationally).
- The remaining 58.4% of Hartland Township households do not have children under 18 and include married couples (33.8%), other non-traditional family households (4.3%, related adults living in the same households), and 20.3% non-family households (unrelated or single adults living in the same household).

Median household income in the Township is estimated at \$78,122, almost 17% higher than the Livingston County median of \$66,938. More than a third of Hartland Township's households have incomes above \$100,000 per year.

The Township's population is less diverse than the national as a whole.

- Nearly 96 % of the Township's current residents are white (71.3% nationally).
- Less than 1% are African American (12.7% nationally).
- 1.2% are Asian (over 5% nationally).
- The remaining 2.3% are native Hawaiian, some other race, or a mix of two or more races (16% nationally).

Less than 3% of the population is Hispanic/Latino by origin, predominantly Mexican, Puerto Rican, and Cuban (17.6% nationally).

Hartland Township residents are significantly better educated than the nation as a whole. Over 34% of all Township residents aged 25 or older have a college or advanced degree, well above the national share of 28.4%.

Single-family detached houses are the predominant housing type in Hartland Township.

- Nearly 81% of the Township's 5,574 housing units are single-family detached houses (61.6% in the U.S.).
- 3% are single-family attached units (5.8% nationally).
- 1.2% are units in two-unit buildings (3.8% nationally).
- 5.4% are located in buildings of three to 19 units (just under 14% nationally).
- Less than 1% are in buildings of 20 or more units (8.5% nationally).
- Nearly 8.7% of Township units are mobile homes, trailers, boats, RVs, or vans (6.7% nationally).

Approximately 5% of all Township housing units are currently estimated to be vacant. Of the 5,286 occupied units, 12.6% are rented and 87.4% are owner-occupied, a very high homeownership rate – the national homeownership rate is 65%.

The median year built of the Township's housing stock is 1992. Over 27% of all housing units were built during the 1990's, with over 20% constructed during the 1970's, and just under 20% between 2000 and 2004. The median value of owner-occupied dwelling units in the Township is estimated at \$200,142, almost 10% higher than the national median of \$182,100.

Residents of Hartland Township also have higher rates of automobile ownership than the nation as a whole, in part because there is very limited public transportation in the Township.

- 2.3% of the Township's households do not own an automobile (just under 10% nationally).
- Less than 20% own only one vehicle (34% nationally).
- Nearly 78% own two or more vehicles (nearly 57% nationally).

The primary transportation to work for Hartland Township employees aged 16 and older is the automobile, again because there are few transportation alternatives in the Township.

- Nearly 88% drive alone to work (76.4% nationally).
- Just under 7% car-pool (9.8% nationally).
- Only 0.15% take public transportation (5% nationally).

- Just 1.7% walk to work (less than 3% nationally).
- The remaining 3.5% either work at home (2.6%) or have other means of getting to work (0.9%). (Nationally, 4.3% work at home, and over 1.7% have other means.)

Approximately 66% of the Township's residents over age 16 are employed in white-collar occupations, 20.8% blue-collar, and 13.2% service and farm occupations. Nationally, white-collar jobs make up more than 60% of all employment, blue-collar 20.4%, and service and farm occupations 18.9%.

Nearly three-quarters of the Township's residents over age 16 are employed by private businesses, 6% work for non-profit private companies, and 12.3% are local, State, or federal government employees. Just 6.8% are self-employed, and 0.17% are unpaid family workers.

By occupation, sales and related jobs account for the largest percentage of civilian employees, at 12.1%, followed by office and administrative support at 11.7%, and management positions at 10.7%. These are roughly comparable to the national numbers; nationally, sales and related occupations represent just under 11%; office and administrative support 13.7%; and management 10.7% of national civilian employment.

Sources: U.S. Bureau of the Census; The Nielson Company; Zimmerman/Volk Associates, Inc.

SUMMARY OF FINDINGS

The Planning Commission began its evaluation of the 2011 Comprehensive Plan following a thorough review of the document entitled, <u>An Analysis of Residential Market Potential for Hartland Township</u>. As indicated previously, this document was contracted by the Township for the purpose of serving as a resource in the update of the Comprehensive Plan, and the Planning Commission utilized this document throughout the process. Many other important factors relating to residential growth were considered, including improvements contained in the Capital Improvements Program, current and future water and sewer service needs, the status of the Safer Roads Plan, School District and other public facility locations, and the status of known development projects.

For purposes of this 2020-2021 Comprehensive Plan amendment, the Planning Commission maintained a focus on the residential elements of the 2015 Comprehensive Plan, with the knowledge that a full update would likely occur in the near future. Prior to beginning analysis of the individual designations however, the Residential Development policies were re-evaluated. Since the Residential Development policies provide important context, it was necessary to ensure that these Policies still reflected community views on neighborhood characteristics.

The Planning Commission then proceeded to evaluate each residential future land use designation individually, assessing the adequacy of each relative to the target markets described in the Zimmerman/Volk Analysis along with other related factors. Each residential designation was reviewed and updated, and the locations analyzed. The Future Land Use Map was updated to reflect the findings.

A Public Workshop was held to gain input on proposed changes prior to the required Public Hearing. The purpose was to provide ample opportunity for any issues or concerns to be heard before the draft document was finalized. Once the Planning Commission approved the draft 2015 Comprehensive Plan amendment, it was conveyed to the Township Board of Trustees for review and comment. The adoption of the 2015 Hartland Township Comprehensive Plan amendment was undertaken in accordance with all relevant provisions of Public Act 33 of 2008, the Michigan Planning Enabling Act.

In 2019, the Township Board approved a Retail Market Analysis by Gibbs Planning Group. In summary, the report found that Hartland can support the following increase in square footage of retail/restaurants and the amount of additional sales:

Presently	116,800 square feet of retail/restaurants	\$35.4 million in sales.
By 2025	133,700 square feet of retail/restaurants	\$43 million in sales.
By 2035	159,500 square feet of retail/restaurants	\$50.7 million in sales.

A general planning principal on development is for every acre of land, 10,000 square feet of commercial/restaurant could be developed. In cases of extreme wetlands/natural features, sometimes that figure can be as low as 6,000-8,000 square feet of commercial/restaurant development per acre of land. As indicated in the Retail Market Analysis, an additional 20-25 acres of commercial retail/restaurant development could be supported in Hartland Township through the year 2035. The report further indicated that walkability and mixed-use communities would have the most success.

In addition, the Township has reviewed and discussed several apartment complex developments. The 2014 Residential Market Analysis indicated the Township could absorb approximately 500 new units within the near future. Based on recent development trends, the Township determined too much land is currently designated in the Multiple-Family land use category on the Future Land Use Plan.

The Township has expressed an interest in having mixed-use developments that present walkable communities; based on findings of the Residential Market Analysis and Retail Market Analysis, as well as requests from the private sector. As a result, the Planning Commission has initiated the proposed amendments to the Future Land Use Map and Comprehensive Development Plan.

RESIDENTIAL DEVELOPMENT POLICIES

Hartland Township is expected to continue to be a desirable community in which to live and raise a family. The Township offers a unique blend of rural and suburban characteristics, and it should strive to preserve these existing qualities while at the same time encourage new residential development that will meet the needs of a future population. A variety of housing types, forms, sizes and costs are all necessary to accommodate a diverse and growing residential population and provide for the changes in lifestyles that such growth brings.

The following residential development policies should be followed when evaluating future residential proposals to ensure that such new development is compatible with the existing character of the Township, to provide housing opportunities for all lifestyles, and to offer the amenities typical of a healthy, active community.

- 1. Maintain large, landscaped buffer areas along major roadways to protect natural viewsheds and ensure the preservation of the rural character. This is especially important where a transition in land use intensity is separated by a roadway.
- 2. Preserve existing vegetation as much as possible. When vegetation must be removed or where a site has been previously cleared, new plantings should be installed to ensure that the development has a

lush, pleasing appearance that adds value to the future residents of the development, as well as to the Township as a whole.

- 3. Provide pedestrian amenities including sidewalks, pathways, and trail systems to encourage safe, convenient access to adjacent pedestrian networks, and facilitate walking, biking, and similar active, outdoor pursuits within the neighborhood itself. This is particularly important in medium and higher density neighborhoods.
- 4. Encourage varied housing types, forms, sizes and costs that complement the existing, surrounding development patterns and integrate with the natural environment.
- 5. Provide a landscape plan that includes street trees and plantings in all open and common areas within residential developments.
- 6. Where appropriate, encourage a mix of residential, retail and office uses that residents can safely walk to and from.
- 7. All internal streets and vehicular access routes should be paved and necessary infrastructure should be designed and installed in a way that minimizes negative visual impacts and protects community property values.
- 8. Where feasible, encourage clustering of homes in order to preserve natural features that add interest, environmental value, and wildlife habitat.
- 9. Encourage open space within all new residential developments in order to accommodate future infrastructure requirements, provide common areas, allow for recreational opportunities, and preserve unique natural features.
- 10. Design developments to provide road connections to adjacent developments.
- 11. Continue to promote high maintenance standards and encourage improvements within existing neighborhoods, as well as new residential developments, in an overall effort to ensure a quality living environment for all residents.

NONRESIDENTIAL DEVELOPMENT POLICIES

As the number of residential dwelling units continues to increase within the Township, there will be additional demand for nonresidential development as well. The Township will need to encourage the use of the following design objectives to ensure that new nonresidential development is compatible with and enhances the existing character of the Township.

- 1. Provide green open spaces that are visible from the adjacent road right-of-way serving the development site and from adjacent lower intensity use sites.
- 2. When possible, group buildings into campus settings with lawns, open spaces, and walkways encouraging pedestrian connectivity between buildings.
- 3. Provide pedestrian access throughout developments. Create sidewalks and pedestrian paths to carry pedestrians from automobile parking lots to buildings. Routes should be planned and provided to move pedestrians and non-motorized vehicles between adjacent buildings and sites.

- 4. Preserve natural vegetation as much as possible. When vegetation must be removed or where a site has been previously cleared, plantings should be provided to assure that the site will be an attractive amenity to the community and present a pleasing appearance from nearby sites and roads. The end results should be lush vegetation to complement the proposed structures on the site and exiting sites in the vicinity.
- 5. Utilize building materials that include brick, stone, and wood in combination with other customary building materials. The structures should be constructed so as to become a source of pride for the community. It is intended that new development establish a consistent theme or adhere to a theme previously approved by the Township.
- 6. Encourage development that is of a size and scale appropriate for its location in the community. It should also blend harmoniously with other development in the Township. The Township may consider increases in the scale and size of a development, including increases in building height, when exemplary architectural and site design features are provided and landscaping and/or decorative screening measures ensure compatibility with nearby lower intensity uses.
- 7. Provide parking areas that are carefully incorporated into the plans so as to avoid a wide expanse of parking lot separating commercial structures from the fronting roads. Landscaped yard spaces and islands should be placed so as to break up the expanse of large parking lots. Encourage, wherever practical, joint use and reciprocal parking areas to reduce the amount of hard surface materials and allow for full utilization of the existing parking areas.
- 8. Manage automobile traffic associated with the site so that only necessary vehicle drives and streets are constructed. Wherever practical, encourage joint access drives and streets in order to avoid unnecessary disruption of the natural environment, avoid excessive storm drainage runoff, minimize disruption of the existing traffic flow, promote best access management practices, and provide economical access solutions.
- 9. Promote clustering of sites to encourage preservation of natural features within a development.
- 10. Encourage the development of alternative energy and green industries within the community.

SETTLEMENT AREA DEVELOPMENT POLICIES

Much of the Township's rural, historic character derives from the Hartland Village and the Parshallville Settlement. Maintaining a balance between preserving these communities, while sustaining their continued viability, is imperative to protecting the heritage of Hartland Township. Every effort should be made to ensure that the unique qualities of these settlements continue to be preserved, and that new development proposed respects the size, scale, use and design of the existing land use and development patterns.

- 1. Encourage a viable mix of complementary retail, office, and residential uses. Create a retail-oriented mix of businesses that encourages an active pedestrian environment and promotes both convenience and destination shopping.
- 2. Encourage designs that are compatible in terms of materials, style, and scale, with the varied and interesting historic architecture in the Village.

- 3. Encourage one- and two-story buildings that allow a mix of uses by incorporating residential, commercial, and office uses. Locate and design buildings that are conducive to pedestrian activity. Promote a mix of uses by supporting retail on the first floor and allowing office and/or residential use on the second floor.
- 4. Maintain safe and attractive pedestrian connections between parking areas and the Village by providing designated sidewalks, landscaping, and pedestrian scale lighting.
- 5. Promote the Village as a Township-wide asset that enhances property values, community identity, and helps create a sense of place.
- 6. Promote development that reinforces the consistent use of traditional urban design and architectural design elements. Encourage development patterns that visually tie the area together. Require sidewalks and public spaces in the front of proposed development in order to allow for outdoor seating or other public congregation.
- 7. Encourage uses that avoid objectionable noise, glare or odors, and those that result in vibrant outdoor spaces and associated uses such as outdoor seating and street cafes.
- 8. Encourage reinvestment and redevelopment by providing incentives (density bonuses, parking waivers) for the creation of mixed-use development.
- 9. Strive to maintain the existing development pattern by establishing "build-to" lines, allowing alley vehicular access, and encouraging street/sidewalk orientation.
- 10. Locate off-street parking to the rear of the buildings. Avoid requiring parking in excess of that necessary to support a successful mixed-use business district by allowing shared parking. Carefully manage the relationship between parking and loading activities; maintain separations between pedestrian and vehicular traffic.
- 11. Continue to encourage activities such as street fairs, farmers markets, music on the plaza, and similar events that bring people into the Village and promote it as a Township-wide gathering area.
- 12. Maintain and encourage public and quasi-public land uses that enhance the framework of the Village.

AGRICULTURAL PRESERVATION AND ALTERNATIVE ENERGY RESOURCE DEVELOPMENT POLICIES

The existing land use map identifies areas of the Township known for agricultural use. With large tracts of land and a demand for alternative energy resources, there is an opportunity to preserve the agricultural land that helps define Hartland's heritage, while creating an innovative economic development resource for the community. A map should be developed that delineates the areas of the Township that are considered "prime" for agricultural preservation.

1. Adopt ordinances and policies that promote continued use of farmland and discourage unplanned land divisions that hinder continued farming on prime agricultural sites.

- 2. Adopt ordinances and policies that promote alternative energy use in conjunction with the preservation of agricultural sites.
- 3. Minimize adverse impacts on agricultural lands adjacent to development areas by using appropriate buffer zones and site planning.
- 4. Provide and support local enterprises for economic viability and community networking, such as farm markets and on-site farm stands.
- 5. Adopt ordinances and policies that promote alternative energy that is consistent with the site and architectural standards of the community.

FUTURE LAND USE DESIGNATIONS

The Future Land Use Map graphically portrays Hartland Township's plan for development. Sixteen land use designations are included in the categories for assignment in the Future Land Use Plan. The land area comprised of designations are summarized in the table below. The descriptions of the uses often suggest design characteristics and site amenities that are determined to be desirable. For example, the notion of an "Estate Residential" designation is to help the reader visualize what an estate might look like with substantial yard areas surrounding a home in a rural setting. Those descriptions assist in the formation of Zoning Ordinance provisions and planned development agreements, and the translation of the established vision into land use regulations.

Category	Acres	Percent
Rural Residential (1 unit per 3 acres)	869.10	3.65%
Estate Residential (1 unit per 2 acres)	12,184.45	51.13%
Low Suburban Density Residential (1 unit per 1-2 acres)	1,757.49	7.38%
Medium Suburban Density Residential (1 unit per 1/2-1 acres)	2,605.53	10.93%
Medium Urban Density Residential (1 unit per 1/3-1/2 acres)	935.13	3.92%
High Density Residential (MFH Parks)	166.40	0.70%
Multiple Family Residential (1 unit per 1/8 acres)	274.01	1.15%
Village Residential	179.60	0.75%
Village Commercial	17.50	0.07%
Special Planning Area	612.49	2.57%
Commercial	339.20	1.42%
Office	161.70	0.68%
Planned Industrial Research and Development	627.30	2.63%
Residential Recreation	1,281.20	5.38%
Public/Quasi Public	752.90	3.16%
Surface area of lakes and road right-of-way	1,066.00	4.47%
Total	23,830.00	100%

Single-Family Residential

Single-family residential land use has been and will continue to be the predominant land use within the Township. Approximately 18,600 18,518.10 acres are planned for single-family residential use. Six intensities of single-family detached residential land uses have been included within this plan. Each of the single-family residential categories will permit development of similar land uses; however, the intensity of these uses will vary.

Certain nonresidential uses may be necessarily located in residential areas. For example, public and private schools, and churches can be successfully integrated under certain conditions. If future nonresidential uses are permitted, they should be controlled as special land uses and developed in accordance with existing zoning provisions, assuring that the site is adequately sized and designed to reduce any adverse impacts. In particular, such uses should be screened and buffered from adjacent residential areas. It should be noted that existing schools and parks are designated as Public/Quasi-Public.

New development adjacent to watercourses must be sensitive to the waterfront, and disturbance to existing natural features should be minimized. Adequate buffers and setbacks should be provided from the waterfront. New development, to the extent possible, should maintain the general scale and character of adjacent residential properties.

The densities indicated for the six intensities of single-family residential uses described below largely include area required for rights-of-way, utilities, and other public improvements.

Rural Residential

General Location. Several areas in Hartland continue to enjoy a rural lifestyle and coexist with agricultural uses. These areas have been planned for parts of the Township where large parcels of land have been preserved. All of the 869 *869.10* acres of planned for Rural Residential land uses are located north of M-59 and west of US-23 in the vicinity of the Parshallville settlement.

Intended Land Uses. The Rural Residential designation is planned to accommodate agricultural uses in combination with large lot residences. Agricultural uses are encouraged in the Rural Residential designation including crop production, the raising and keeping of domestic and farm animals, and similar agriculture-oriented uses. Also, based on the desire expressed by the Township to manage residential growth in a manner that maintains the predominantly rural character of the Township, the Rural Residential designation is intended to permit new residential development on larger pastoral lots.

Characteristics. To preserve the rural character of the Township, new development within the Rural Residential areas should be designed to protect existing natural and environmental features and compliment to the existing qualities. The Rural Residential designation is intended for residential development with an average density of three (3) or more acres per dwelling unit.

Estate Residential

General Location. This designation has been planned for 12,046 12,184.45 acres, and is the predominate type of residential land use intended for the Township. It encompasses nearly half of the land in the Township at approximately 50%. In many respects, these areas are intended to be transitional in nature, accommodating both agricultural as well as large-lot residential uses.

Intended Land Uses. The Estate Residential areas are intended to provide for very low density residential development. Where appropriate, agricultural uses are also anticipated within this designation.

Characteristics. The Estate Residential designation is intended to permit new residential development on lots with an average density of two (2) or more acres per dwelling unit. Development within the Estate Residential designation should be considered as a transition area between the Rural Residential areas and the more intense single-family residential and nonresidential areas of the Township. The residential development within this designation should be designed to protect view sheds from adjacent roadways. It should also be buffered from adjacent lower intensity land uses, as well as from higher intensity uses. New Estate Residential development should have access to paved streets, interior sidewalks or other pedestrian amenities, and feature ample landscaping with open space and park areas.

Low Suburban Density

General Location. Approximately 1,677 1,757.49 acres of land have been planned for future Low Suburban Density residential land use. The Low Suburban Density Residential designation is one of the larger designations in terms of land area in the Township. The two principal areas with this designation include land on the north side of M-59 on the eastern side of the Township, stretching from Clark Road to the eastern boundary, and around the perimeter of Long Lake.

Intended Land Uses. This land use designation has been planned to accommodate a low density, traditional, neighborhood form of residential use, and to function as a transition from the Estate Residential designation and other higher intensity residential and nonresidential land uses. Long term agricultural uses are not expected to be maintained in the Low Suburban Density Residential areas though a continuation of some uses is expected.

Characteristics. New development within these areas should be compatible with the established large lot building pattern. New development should be encouraged to provide through streets, ample landscaping, open space, park areas, and pedestrian amenities. Landscaped buffers should be provided between such development and M-59 and other major thoroughfares.

The Low Suburban Density Residential land use designation is intended for new residential development on lots with an average density of one (1) to two (2) acres per dwelling unit.

Medium Suburban Density Residential

General Location. This designation is also one of the larger land use categories; it has been planned for approximately 2,931 2,605.37 acres of the Township. These areas include some of the most recent development in the community. Hartland Estates, San Marino Estates, Meadow View Estates, Autumn Woods and other similar single-family developments are all located within Medium Suburban Density Residential areas. This land use designation has been assigned to the areas adjacent to Tyrone Lake and Dunham Lake, as well as the areas adjacent to the Township waste water treatment plant. Other areas include the Clark and Dunham Road vicinities, where opportunities exist for somewhat higher densities.

Intended Land Uses. The Medium Suburban Density Residential areas are intended to provide for slightly denser neighborhoods with larger lot homesites. As indicated by the name, these neighborhoods tend to be more suburban, than rural, in character.

Characteristics. The Medium Suburban Density Residential designation will permit new housing development on lots with an average density of one-half to one (1) acre in area per dwelling unit.

Medium Urban Density Residential

General Location. The areas adjacent to Round, Handy and Maxfield Lakes, Millpointe subdivision, and Cobblestone Reserve site condominiums, are all included in the Medium Urban Density Residential designation. The undeveloped land northeast of the Clark and Dunham Road intersection, as well as southwest of the Old US-23 and Bergin Road interchange, is part of this designation which when combined totals approximately 911 935.13 acres.

Intended Land Uses. The Medium Urban Density Residential designation is intended to reflect the existing densities and character of the identified areas and to provide opportunities for new development that is consistent with the referenced neighborhood patterns.

Characteristics. In the Medium Urban Density Residential areas, land can be developed at a density of approximately two (2) or three (3) dwelling units per acre. Lot sizes are anticipated to be 8,000 to 20,000 square feet per dwelling.

High Density Residential

General Location. This land use designation has been planned for 166 166.4 acres of the Township. The identified area currently supports a single high density residential development and no other such uses are anticipated.

Intended Land Uses. Uses intended for the High Density Residential designation are manufactured home parks.

Characteristics. Development within this designation provides an important housing alternative. Similar to other neighborhoods, such uses should include adequate buffers and landscaping both to create an attractive environment, as well as to provide screening from differing uses. Manufactured home parks, due to the densities, should have access to public sewer and water service, and related infrastructure such as a developed road system. In the High Density Residential designation, land can be developed with a minimum lot area of 4,000 square feet.

Multiple-Family Residential

General Location. Multiple-Family Residential land uses are planned for approximately 574 274.01 acres within the Township. Attached condominium complexes and the existing apartment complex are found in this designation. It specifically includes the condominiums east of Hartland Road and south of Dunham Road, and the Oakbrook Apartment complex south of M-59 and west of Old US-23. Undeveloped areas for Multiple-Family Residential include lands north of M-59 and east of Clark Road, significant areas within the Waldenwoods Resort complex, and areas adjacent to the Planned Industrial R&D designation at the Clyde Road interchange.

Intended Land Uses. The Multiple-Family Residential designation is considered appropriate for land that is bordered on one or more sides by nonresidential uses and on the other sides by lower intensity single-family designations. The Multiple-Family Residential designation can serve as a buffer between higher intensity uses and single-family uses.

Characteristics. Multiple-Family Residential developments may consist of attached single-family homes, townhouses, or one to two story apartment buildings. New developments should have access to a paved primary road and have paved internal streets, along with amenities including open space and park areas, sidewalks, and infrastructure built to an adequate capacity. Landscaped buffer areas should be provided

between the multiple-family use and adjacent single-family residential uses. Multiple-Family Residential areas are intended to permit developments with a maximum density of eight (8) units per acre.

Settlement Areas

There are two distinct historic settlement areas in Hartland Township; the Hartland and the Parshallville settlements. While both of these areas have similar characteristics and historic significance within the Township, their development patterns differ. Future land use designations for these areas are described as follows:

Hartland Settlement Area Within the Hartland Settlement Area, two types of land use patterns are envisioned: Village Residential and Village Commercial. Both designations are intended to facilitate preservation of the traditional development patterns and existing buildings within the area:

Village Residential

General Location. The Village Residential category is generally located between Crouse Road and School Street outside of Avon Road throughout the Settlement Area.

Intended Land Uses. The Village Residential category within the Hartland Settlement is intended to recognize the established residential grid pattern that has evolved over the years, as well as encourage new residential uses with the same types of characteristics.

Characteristics. Buildings within this category should be designed to complement the historic character of the settlement. Sidewalks, street trees, and other traditional neighborhood amenities should be required. In addition to allowing new residential construction, the Township should continue to encourage the preservation and rehabilitation of the existing housing stock. New residential development within the Hartland settlement area should be at a density compatible with the surrounding uses.

Village Commercial

General Location. The Village Commercial designation is located along both sides of Avon Road through the Settlement area.

Intended Land Uses. This designation is intended to recognize the mixture of retail, office, and residential use along Avon within the Hartland Settlement.

Characteristics. New land uses should be designed to complement the existing architecture and established development pattern of the Hartland Settlement. Nonresidential uses should have a low impact on the surrounding residential area and generate low traffic volumes. New development should provide traditional village amenities such as sidewalks, street trees, and other streetscape improvements. The preservation, rehabilitation, or adaptive reuse of existing structures should be encouraged.

Parshallville Settlement Area Within the Parshallville Settlement Area, two distinct types of land use patterns have developed and are planned to continue in the future. These land use designations include Village Residential and Village Commercial. Both designations are intended to permit new development while encouraging the preservation of the established character. These designations are described as follows:

Village Residential

General Location. This designation encompasses the majority of the Parshallville Settlement.

Intended Land Uses. This designation is intended to permit new residential development.

Characteristics. New development should be compatible with the established development pattern and have access to a primary road and have paved streets and sidewalks.

Village Commercial

General Location. A limited amount of commercial land uses exist within the Parshallville Settlement area. Due to the limited amount of area available within the Settlement to accommodate additional commercial uses and parking, new commercial land uses should include only those areas that have historically been utilized as such.

Intended Land Uses. This land use designation is intended to permit limited commercial land uses within the Parshallville Settlement area.

Characteristics. Commercial land uses permitted within this designation should have a minimum impact on traffic volume.

Commercial

General Location. With the projected increase in population within the Township, and the retail and service demands that will be created by the increase, approximately 417 *339.20* acres have been planned to accommodate future commercial land uses. The majority of commercial land uses within the Township are concentrated around the M-59 and US-23 interchange. This is the most intensive commercial area in the Township. Such uses should remain close to the interchange and not sprawl along M-59. Other smaller areas of commercial land uses are planned at the US-23 and Clyde Road interchange as well as on the west side of Old US-23, between Crouse Road and M-59.

Intended Land Uses. Land uses in this category are intended to provide for both the sale of convenience goods and personal/business services for the day-to-day needs of the immediate neighborhood and provide for auto-oriented services, customer and entertainment services, and the sale of soft lines (apparel for men, women and children) and hard lines (hardware, furniture and appliances). As the community and region continues to grow, there will be additional demand for commercial uses within the Township.

Characteristics. Commercial development should be of a high quality architectural design with generous landscaping and screening from adjacent lower intensity uses. Parking areas should be limited to the minimum amount necessary to service the proposed land use, be broken up with large planting strips and landscaped islands, and provide safe and efficient circulation. The Township should encourage access management by limiting the number of curb cuts along major thoroughfares and encouraging cross access between developments.

Office

General Location. Future office land uses have been planned for approximately 161 161.70 acres of the Township. Office land uses have been located in areas that contain existing office development as well as in areas that have high visibility along M-59, between Clark Road and Bullard Road.

Intended Land Uses. This classification is intended to permit the construction of professional and medical office complexes, municipal buildings, and other low intensity commercial uses that are accessory to office uses (such as quick-printing, copying and mailing businesses).

Characteristics. New office developments should incorporate adequate landscaping and buffers and have a high quality architectural appearance. Future office developments should not exceed three stories in height to ensure compatibility with surrounding land uses.

Planned Industrial Research and Development

The word "Planned" in this designation's name is intended to convey the Township's intentions to partner with private developers or public entities in the creation of planned developments consistent with the provisions of the Michigan Zoning Act and the Township's Zoning Ordinance. In anticipation of population growth and the resulting demand such growth will place upon Township services, additional nonresidential land use areas will be required. These uses will help stimulate the local economy, provide jobs, and contribute to a diverse tax base in order to facilitate Township growth and allow it to continue to provide the quality of service its residents have grown to expect.

General Location. On the Future Land Use Map, PIRD has been planned for approximately 627 627.3 acres of the Township. Two distinct areas have been designated for future Planned Industrial Research and Development. These areas are the Clyde Road and US-23 interchange and the Old US-23 corridor, south of M-59.

Intended Land Uses. The PIRD designation is intended to permit industrial land uses that consist of small parts fabrication, research and development testing firms, laboratories, electronics firms, and office research uses. Such uses typically do not produce the negative effects often associated with heavy industrial development, such as noise, glare, odor, dust, heavy truck traffic, and fumes. Industrial uses envisioned for the Township will be generally conducted within a completely enclosed building with minimal or no outdoor storage areas. The PIRD category is also intended to permit office complexes, including medical facilities, financial institutions, public and private recreational facilities, and ancillary services that support the planned industrial research uses.

Characteristics. Planned industrial research and development facilities should be located in areas where an adequate level of infrastructure exists, thus providing for access to water and/or sewer services, paved roads, and highway interchanges. When necessary, the design of such facilities should incorporate buffering from lower intensity uses.

<u>Clyde Road and US-23 Interchange Area.</u> New facilities at this interchange should be developed as a planned development within a campus-like setting with generous landscaping and attractive buildings. Such development should not contain uses that create heavy truck traffic, noise, glare, or emissions that are typical of most industrial areas. In particular, the Township should encourage adequate landscaped areas, and open space or natural buffers between planned industrial areas and adjacent residences.

<u>Old US-23 Area.</u> This area has historically been used for industrial purposes and the Township should continue to support those existing light industrial/technology uses while encouraging new, complementary uses of an appropriate size and scale. Since this area is highly visible from both Old US-23 and US-23, generous landscaping and high quality architectural design should be encouraged. Outdoor storage and industrial yards should appropriately screened from view.

Residential Recreation

General Location. This land use designation encompasses 1,281 1,281.20 acres in area and has been planned for the Waldenwoods Resort and Majestic Golf Course located north of M-59 and west of US-23.

Intended Land Uses. Land uses in this category include single-family residences, multiple-family residences, campgrounds, golf courses, banquet facilities, outdoor driving ranges, clubhouses, hotels, bike paths, pedestrian trails, and athletic fields designed and operated in a planned and unified manner. Integrated design and preservation of the natural landscape is crucial to successful development within this designation.

Characteristics. The location specified includes many interesting natural features including woodlands, wetlands, lakes, ponds, all situated within a picturesque rolling topography. Lake Walden, one of the most scenic lakes in the Township, is the dominant natural feature in this area. Any new development proposed should be designed to be sensitive to existing uses and respect the environmental context.

Public / Quasi-Public

General Location. Approximately 752 752.90 acres of land within the Township have been designated for public and quasi-public land uses. Government offices, fire stations, schools, churches, cemeteries, parks, and Township or municipal property such as the water and waste water treatment plant are included in this designation. Such uses, by nature, are not usually limited to a specific zoning district or development area since flexibility in siting public facilities is essential. Moreover, these uses are generally considered to be compatible with most land uses within the Township.

Intended Land Uses. This designation includes the varied forms of public and quasi-public uses referenced previously that are critical to healthy, functioning communities. Such uses generally are determined to be complementary in nature and do not necessarily conflict with residential land uses.

Characteristics. The design of new public and quasi-public uses should be consistent with the established building pattern, of quality design, and include generous landscaping and pedestrian amenities. Public and quasi-public uses under the jurisdiction of the County, State, or Federal government, or other public entities, should be developed only in close consultation with the Township.

M-59 / Pleasant Valley / Fenton Road Special Planning Area

The Planning Commission designated a Special Planning Area (SPA) on the west side of the M-59 intersection at Pleasant Valley/Fenton Road. It is the intention of the Planning Commission to work closely with the landowners in that area to establish the terms of an agreement for a mixed-use planned unit development (PUD). About 149 acres are included in the SPA.

The Commission has agreed that the SPA should have a density that is flexible. Overall, the SPA shall have a base density of four (4) dwellings per acre.

The Planning Commission has determined that the PUD can be created within an environment that encourages pedestrian linkage between activity nodes and resource features. The following principles have been agreed upon for the SPA:

- 1. Development within the Special Planning Area shall provide for a variety of housing forms (for example, single-family, townhouses, condominiums, apartments and senior housing), along with retail, office recreation and entertainment space.
- 2. Development within the Special Planning Area shall provide for public facilities and other neighborhood amenities.
- 3. Development within the Special Planning Area shall provide pedestrian and vehicular links between internal land uses and adjacent property not necessarily located within the SPA.
- 4. Development within the Special Planning Area shall comply with the Township's goal of to creating walkable pathways to the Township settlement areas and other public and private facilities.
- 5. New development shall be designed to harmoniously coexistence with pre-existing historical and natural features within the Township.
- 6. New development proposed for the Special Planning Area must include landscape, streetscape, traffic and architectural solutions that are superior in design and visual enhance the community. Design that respects the existing historic features is essential.

M-59/Cundy Road /Hartland Glen Golf Course Special Planning Area.

The Planning Commission designated a Special Planning Area (SPA) on the south side of the Cundy Road and south of M-59 intersection at Pleasant Valley/Fenton Road. It is the intention of the Planning Commission to work closely with the landowners in that area to establish the terms of an agreement for a mixed-use planned unit development (PUD). Approximately 385.09 acres are included in this Special Planning Area.

The Commission has agreed that the SPA should have a density that is flexible. Overall, the SPA shall have a base density of four (4) dwellings per acre. However, the Commission agrees that a high density is more desirable in the northern portion of the site while a lower density is more desirable in the lower portion of the site. The surrounding properties in the northern portion of the site are at a much higher density when compared to the surrounding properties along the southern portion of the site. As a result, up to 25% of the density may be increased in the northern portion of the site (up to five (5) dwelling units per acre), if the southern portion of the site is deceased by 25% (up to three (3) dwelling units per acre). Overall, the entire site shall remain at four (4) units per acre.

The Commission has agreed that if the developers of the SPA are able to include certain desirable design features that significantly enhance the appearance and function of the site, additional "bonus" density dwelling units can be awarded to the development as an incentive to promote a high-quality development. However, such a "bonus" density will only be awarded at the discretion of the Township in accordance with established development regulations of the Township and State of Michigan.

The Commission has determined that the PUD can be created within an environment that encourages pedestrian linkage between activity nodes and resource features. The following principles have been agreed upon by the Commission for the SPA:

- 1. Development within the Special Planning Area shall provide for a variety of housing (for example, single-family, townhouses, condominiums, apartments and senior housing), retail, office, recreation and entertainment space.
- 2. Developments within the Special Planning Area shall provide for public facilities and other neighborhood amenities.
- 3. Special Planning Area shall provide pedestrian and vehicular links between land uses and adjacent property (that may not be directly included within this Special Planning Area development).
- 4. Special Planning Area shall also coordinate with the Township's goal to create walkable pathways to the Township settlements and other public and private facilities.
- 5. Developments shall be developed in harmonious coexistence with the pre-existing historical and natural features within the Township.
- 6. Special Planning Area shall include landscape, streetscape, traffic and architectural solutions that are superior to typical design and visually enhancing the local community with sensitivity to the historic features in the Township.

<u>M-59/Old US 23 Special Planning Area.</u>

The Planning Commission designated a Special Planning Area (SPA) on the southwest corner of the M-59 intersection at Old US 23. It is the intention of the Planning Commission to work closely with the landowners in that area to establish the terms of an agreement for a mixed-use planned unit development (PUD). Approximately 77.9 acres are included in this Special Planning Area.

The Commission has agreed that the SPA should be planned for a base density of up to four (4) dwellings per acre. The vision for this area is to establish a mixed-use development that contains a mix of residential, office, and commercial development to create a walkable and pedestrian oriented development.

The Commission has agreed that if the developers of the SPA are able to include certain desirable design features that significantly enhance the appearance and function of the site, additional "bonus" density dwelling units can be awarded to the development as an incentive to promote a high-quality development. However, such a "bonus" density will only be awarded at the discretion of the Township in accordance with established development regulations of the Township and State of Michigan.

- 1. Development within the Special Planning Area shall provide for a variety of housing (for example, single-family, townhouses, condominiums, apartments and senior housing), retail, office, recreation and entertainment space.
- 2. Developments within the Special Planning Area shall provide for public facilities and other neighborhood amenities.
- 3. Special Planning Area shall provide pedestrian and vehicular links between land uses and adjacent property (that may not be directly included within this Special Planning Area development).

- 4. Special Planning Area shall also coordinate with the Township's goal to create walkable pathways to the Township settlements and other public and private facilities.
- 5. Developments shall be developed in harmonious coexistence with the pre-existing historical and natural features within the Township.
- 6. Special Planning Area shall include landscape, streetscape, traffic and architectural solutions that are superior to typical design and visually enhancing the local community with sensitivity to the historic features in the Township.

Natural Resource / Conservation Recreation.

Along with the many ponds, lakes, and wetlands found through Hartland Township, the landscape is traversed with watercourses of various types. These water resources contribute significantly to the character of the community and enhance its reputation as a desirable place to live. Providing for residential development in proximity to water resources, however, comes the potential for degradation of that very resource, and the unfortunate consequences can include environmental contamination, a diminishment in aesthetic appeal, and a corresponding loss of property value. Specific examples of damage that can occur include soil erosion from storm water runoff, well contamination from improperly operating septic systems, and lake contamination from excessive sedimentation. In order to reduce the potential for such loss, development proposed in proximity to sensitive water resources must be undertaken in an environmentally sound manner, in a way designed to reduce the potential for contamination.

The environmentally sensitive areas in the Township are identified on the Opportunities and Constraints Map contained in the Comprehensive Plan. This Map identifies the larger lakes and significant watercourses; however, it is not the purpose of a Future Land Use Plan to document all such constraints on individual parcels. This Future Land Use Plan, instead, sets forth a Natural Resource/Conservation Recreation designation that is intended to apply to those areas containing water resources such as the land around ponds and lakes, adjacent to streams, and in proximity to wetlands. Its purpose is to specify that development taking place in these sensitive areas, regardless of the designation shown on the Future Land Use Map, is undertaken in an environmentally safe and sustainable manner.

Considering that many units have been constructed on the numerous lakes in Hartland Township, and that many have chosen to live in Hartland specifically for this particular amenity, it is important to balance the live-ability of these areas with protection of the resource. Though other governmental entities, including the Michigan Department of Environmental Quality, the Livingston County Drain Commission, and the Livingston County Health Department, have the larger responsibility for protecting water resources, the Township can consider both policy and regulatory measures that allow for development while also protecting important resources. These include minimizing construction that negatively impacts water resources, requiring municipal water and sewer for new residential development adjacent to lakes, and requiring conservation easements over recharge areas. For the purpose of the Comprehensive Plan in general, the following descriptions are provided:

Conservation Recreation. The areas adjacent to the fragile watercourses within the Township are designated Conservation Recreation. These areas are intended to serve as a buffer that minimizes the adverse impact of new or existing development along these watercourses. The areas considered Conservation Recreation are an underlying land use and is not part of the Future Land Use Categories.

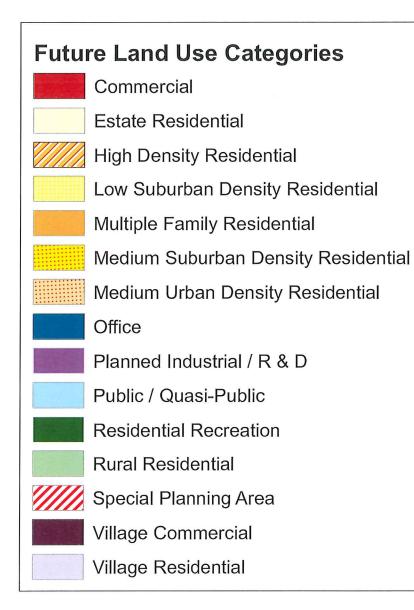
Lakes / Streams. The Township has thirteen (13) significant water bodies that are connected through an extensive watercourse network. The Lakes and Streams are considered an underlying land use and are not part of the Future Land Use Categories.

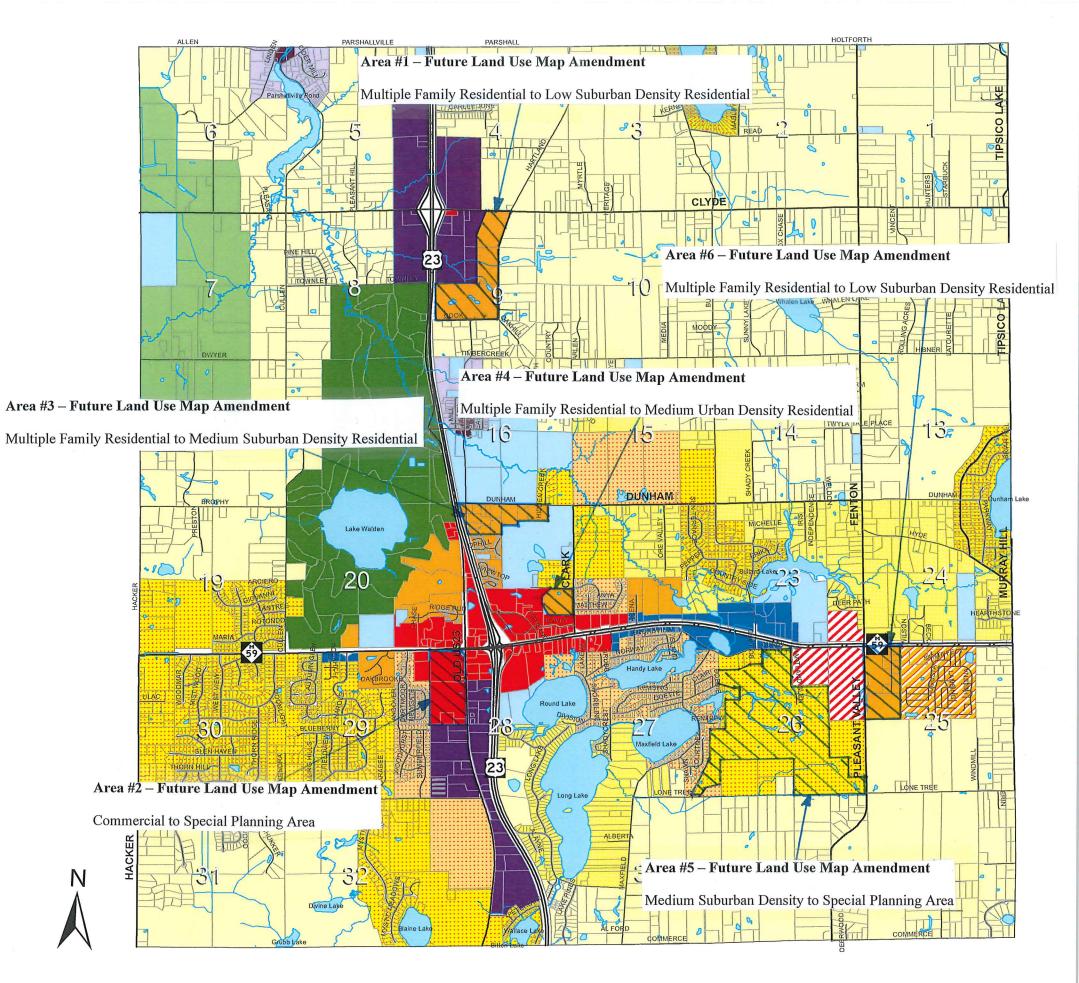


Hartland Township Livingston County, MI

FUTURE LAND USE MAP

Adopted September 1, 2015





Map Created By: Hartland Township Planning Department Basemap Source: Livingston County

Recommended for Approval by the Hartland Township Planning Commission on July 30, 2015 Adopted by the Hartland Township Board of Trustees on September 1, 2015

