



Section 6: Market Analysis

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The following market analysis was prepared to provide guidance to the Comprehensive Plan so that its recommendations reflect current market realities and future opportunities. The assessment addresses the following topics:

- Area demographic trends
- Area economic trends
- Residential market conditions and potential
- Retail market conditions and potential
- Industrial market conditions and potential
- Hotel market conditions and potential.

Demographics

Area Context

The Village of Mattawan is located in Van Buren County in Southwestern Michigan. The eastern boundary of Mattawan is on the boundary between Van Buren and Kalamazoo Counties, making both counties significant in the analysis of trends. The Kalamazoo-Portage Metropolitan Statistical Area (MSA) is comprised of Kalamazoo and Van Buren Counties, indicating that the two counties are considered to have a common economy. Kalamazoo County, with a 2000 population of 238,603, is more than three times larger than Van Buren County, which had a population of 76,263. As shown in the graphic below, the State Demographer forecasts modest growth for both counties in the next 15 years.

All of the Village of Mattawan is located within Antwerp Township. Table 6.2 shows demographic trends in Antwerp and Texas Townships as well as surrounding townships. Among the six townships, Texas Township had the highest rate of household growth in the 1990s, while Oshtemo Township has the largest increase in the number of households. Both of these townships are located in Kalamazoo County.

Table 6.1: Population Trends By County



Source: Office of the State Demographer

Table 6.2: Population and Households Trends by Township

Township	Population			Households					
	1990	2000	Percent Change	1980	1990	2000	Percent Change 1980-90	Percent Change 1990-2000	Increase 1990-2000
Van Buren County									
Alemena	3,581	4,226	18.0%	975	1,204	1,553	23.5%	29.0%	349
Antwerp	9,293	10,813	16.4%	2,566	3,121	3,764	21.6%	20.6%	643
Paw Paw	6,701	7,091	5.8%	2,330	2,589	2,771	11.1%	7.0%	182
Waverly	2,188	2,467	12.8%	714	769	912	7.7%	18.6%	143
Kalamazoo County									
Oshtemo	13,401	17,003	26.9%	4,726	5,835	7,551	23.5%	29.4%	1,716
Texas	7,771	10,919	40.5%	1,765	2,630	3,879	49.0%	47.5%	1,249

Source: Census Bureau

Households Age + Income

The Area Map, at the end of this section, shows Mattawan in the context of 2-, 6-, and 12-mile radii.

- The 2-mile radius covers the immediate area around Mattawan, including an area north of the Red Arrow Highway. This immediate area contains 1,912 households
- The 6-mile radius reaches the Ninth Street interchange to the east and takes in Paw Paw to the west. This ring around Mattawan adds 10,350 households.
- The 12-mile radius includes much of Kalamazoo and Portage to the east. The six- to 12-mile ring around Mattawan contains an estimated 63,726 households, with most of the density coming from Kalamazoo.

Table 6.11, at the end of this section, compares the characteristics of each concentric rings. (Households in the smaller rings are not included the larger rings.)

Table 6.3: Types of Households in Mattawan, 2000

Household Type	Number	Percent
Households with 1 or more People under Age 18:		
Married-Couple Family	268	27.9%
Other Family, Male Householder	41	4.3%
Other Family, Female Householder	121	12.6%
Nonfamily, Male Householder	2	0.2%
Nonfamily, Female Householder	0	0.0%
Households with no People under Age 18:		
Married-Couple Family	232	24.1%
Other Family, Male Householder	15	1.6%
Other Family, Female Householder	34	3.5%
Nonfamily, Male Householder	122	12.7%
Nonfamily, Female Householder	126	13.1%

Source: 2000 Census

Households by Income and Age, at the end of this section, shows that, in the immediate Mattawan area, the dominant income category is \$50,000 to \$74,999, representing 27.2% of households. The two-to-six mile ring around Mattawan is more affluent, with larger percentages of higher income households. In the outlying ring (six-to 12 miles), 29% of households have incomes of less than \$25,000. Both student and senior households contribute to the dominance of the lower income categories.

As shown in Table 6.3, over half of the households in Mattawan contain a married couple, and the majority of those households include a child under the age of 18. Over one-quarter of households are nonfamily (none of the people in the household are related). It is likely that many of these households are seniors who live alone.

Economy

As reported by the Upjohn Institute in its June 2006 economic outlook, “it appears that the long-awaited recovery reached west Michigan last year. The Kalamazoo-Portage MSA, one of six metropolitan areas in west Michigan, grew its employment by 0.4% despite a loss of manufacturing jobs.”

The pharmaceutical industry remains a mainstay of the regional economy. Despite various mergers and acquisitions, Pfizer employs about 3,500 workers in Kalamazoo facilities. Kalamazoo is also home to two major health care systems, Bronson and Borgess Health Alliance, and a state university, Western Michigan University, with 26,000 students. Van Buren County, located in Michigan’s fruit-growing belt, has production facilities for brands such as Minute Maid and Welch’s.

Employment Forecasts

Table 6.12, at the end of this section, presents employment forecasts prepared by the state of Michigan. Forecasts are shown for the Benton Harbor Area, which includes Van Buren County, and for the Kalamazoo Area. (Note that these definitions are different from the MSA definitions used by the Upjohn Institute.)

- The Kalamazoo Area has a 2002 employment base of 146,610, which is expected to grow by 8.7% in the 10-year forecast period.

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- Manufacturing, which contributes 21.8% of Kalamazoo Area employment, is forecast to grow by 1.1%. The largest manufacturing category, Transportation Equipment, however, is expected to lose 240 jobs.
- The main share of new jobs is expected to come from the Service-Providing Industries, with significant contributions from Education and Health Services, Professional and Business Services, and Leisure and Hospitality.
- The Benton Harbor Area, with 101,310 jobs in 2002, is forecast to expand its employment base by 6.7% in 10 years.
- Manufacturing represents 22.9% of employment in the Benton Harbor Area and is forecast for modest (0.2%) growth. The largest manufacturing loss, 160 jobs, is expected in the Food category.
- Service jobs will provide most of the new jobs in the Benton Harbor Area, with strong showings in the same categories as the Kalamazoo Area.

The forecasts cautiously point to possible opportunities. A study commissioned by Southwest Michigan First reported that the strength of the labor force is in these categories:

- Logistics and distribution
- Financial services
- Back office operations, such as call centers
- Advanced manufacturing
- Medical sciences
- Life sciences

Mattawan Employers

Mattawan is home to several major companies:

- **MPI Research:** This company conducts research for pharmaceutical, biotechnology, chemical, agricultural, and related industries. It has approximately 1,000 employees and plans to grow to 3,500 employees by 2011. Its campus is at

the southeast corner of the I-94 interchange in the 120-acre Mattawan Business Park.

- **Mol-Son, Moli-Land:** This tool and design shop creates precision-molded parts for automotive electrical/electronic systems as well as power/signal distribution components, fiber optic components, and medical products. The firm employs 100 workers in its 34,000-square-foot facility. It is located on the west side of Main Street just north of Cole Avenue. It also owns 26 acres on the east side of Main Street across from its current location.
- **Alcoa/EPC:** This facility, which is adjacent to Mol-Son, makes products for the automotive industry. It was purchased by Alcoa in 2002.
- **BASF:** This facility is near Downtown at the southeast corner of Main Street and the railroad tracks.
- **Ralph Moyle:** This is a trucking business, which began in 1966, and is headquartered in Mattawan and has warehousing facilities in three nearby communities. Ralph Moyle employs approximately 85 workers.
- **Johnson Poured Walls:** This a construction company that was established in 1971.

In addition to these private-sector businesses, the School District is a major employer, with approximately 400 employees.

MPI Research, Mol-Son, Ralph Moyle, and the School District account for 1,585 jobs in Mattawan.

Mattawan Workers

The 2000 Census reported that 1,347 workers over the age of 16 live in Mattawan. A large majority of them (86.4%) drove to work alone, and over 7% car pooled. The average travel time to work was approximately 23 minutes, and only about 5% of workers spent 45 minutes or more getting to their jobs.

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Table 6.4: Means + Travel Time to Work

2000 Workers Age 16+, Transportation To Work	Number	Percent
Workers	1,347	100.0
Drove Alone	1,164	86.4
Car Pooled	95	7.1
Public Transportation	2	0.2
Walked	42	3.1
Bicycle	5	0.4
Other Means	4	0.3
Worked at Home	35	2.6
2000 Workers Age 16+ by Travel Time to Work		
Workers (Not Working at Home)	1,312	100.0
Less than 15 Minutes	331	25.2
15 - 29 Minutes	680	51.8
30 - 44 Minutes	236	18.0
45 - 59 Minutes	28	2.1
60 or more Minutes	37	2.8
2000 Average Travel Time to Work (Minutes)	22.75	

Source: 2000 Census

MPI Research Expansion

MPI Research expects to grow to a workforce of 3,500 over a five-year period. The growth will be steady, with an average annual addition of 500 new jobs.

The characteristics of current workers provide insight about the 2,500 people who will be coming to work in Mattawan.

- MPI has a young work force with an average age of 34. The median age is likely even younger, as many new hires are recent college graduates.
- The average salary is about \$40,435.
- The highest percentage (40%) of workers live in Kalamazoo, with the second-highest percentage (15%) in Portage. Mattawan and Paw Paw are each home to 7% of MPI's workers.

Table 6.5: Employed Workforce – Occupational Category

Occupation Category	Number	Percent of Total
Management & professional	347	25.4%
Service	235	17.2%
Sales & office	357	26.2%
Construction, extraction, & maintenance	95	7.0%
Production & transportation	330	24.2%
Total	1,364	100.0%

Source: U.S. Census Bureau, 2000 (Population 16 and over)

Table 6.6: Employed Workforce – Industry Category

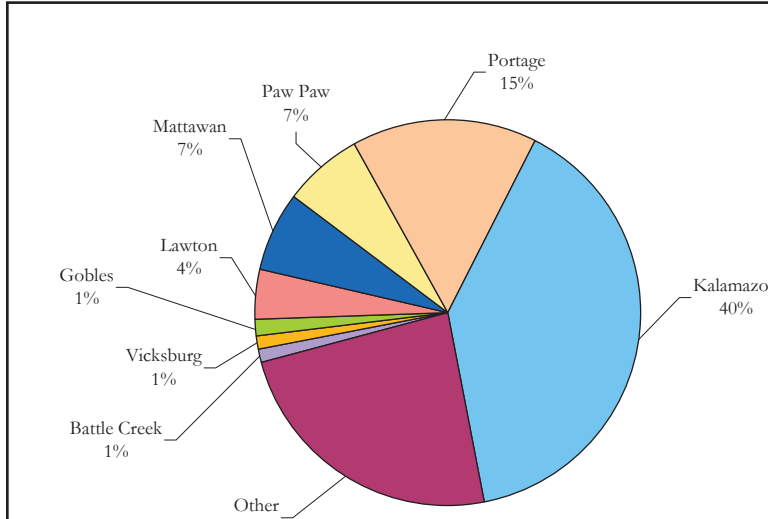
Industry Category	Number	Percent
Agriculture, forestry, fishing and hunting, and mining	11	0.8%
Construction	78	5.7%
Manufacturing	301	22.1%
Wholesale trade	73	5.4%
Retail trade	194	14.2%
Transportation, warehousing, & utilities	49	5.1%
Information	20	1.5%
Finance, insurance, real estate, & rental/leasing	97	7.1%
Professional, scientific, management, administrative, & waste management services	124	9.1%
Educational, health, & social services	265	19.4%
Arts, entertainment, recreation, accommodation, & food services	66	4.8%
Other services (except public administration)	47	3.4%
Public administration	39	2.9%
Total	1,364	100.0%

Source: U.S. Census Bureau, 2000 (Population 16 and over)

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Locations with more than 10 MPI Workers



Source: MPI Research and Goodman Williams Group

Housing Market

Mattawan Housing Profile

As of the 2000 Census, nearly half of the housing in Mattawan was built in the 1970s and 1980s. Vintage homes built before 1940 represent 10% of the housing stock.

Single-family detached homes represent over 44% of the housing stock in Mattawan, and the percentage of mobile home units is nearly as high. The largest mobile home park, West Point Hills, has 377 units.

The make-up of the housing stock is consistent with the high level of homeownership as 82.3% of Mattawan households were homeowners, and 17.6% were renters. The Census also reported an average length of occupancy of nine years.

Permit Activity

From 1999 through 2005, permits were issued for the construction of more than 7,100 new single-family detached housing units in Kalamazoo and Van Buren Counties, as shown in Table 6.13 at the end of this section.

- Kalamazoo County captured 80% of the new construction in the MSA. One-quarter of the new single-family detached units in Kalamazoo County were in Portage, and another one-quarter were in unincorporated areas of the County. Texas Township accounted for 16% of the new detached units.
- Van Buren County reports lower levels of single-family construction, with 1,438 new homes over six years. Mattawan accounted for 6.7% of the new single-family homes.

Table 6.14, at the end of this section, shows that since 1999, only 2,393 attached units were permitted compared to 7,115 single-family detached units. forty-four percent of the multi-family units permitted in 1999 or later are in Oshtemo Township. The City of Kalamazoo ranks a distance second, with 15% of the new multi-family units. The overall average number of units per building is 7.6, indicating that small-scale buildings are typical.

Existing Homes

The median price of the 4,872 existing homes in the Greater Kalamzoo area that were sold by Realtors in 2005 was \$136,775. Through July 2006, the median sales price was \$135,000. Median prices have been relatively static since 2002, when the median price was \$125,000.

Table 6.7: Mattawan Housing by Year Built

Year Built	Number	Percent
1999 to March 2000	26	2.6%
1995 to 1998	142	14.0%
1990 to 1994	121	12.0%
1980 to 1989	209	20.7%
1970 to 1979	277	27.4%
1960 to 1969	70	6.9%
1940 to 1959	66	6.5%
1939 or earlier	101	10.0%

Source: 2000 Census

Table 6.8: Housing Units by Building Type

Units by Building Type	Number	Percent
Total housing units	1,012	100.0%
Single-family detached	446	44.1%
Units in duplex structures	32	3.2%
Units in buildings with 3-4 units	56	5.5%
Units in buildings with 5-9 units	9	0.9%
Units in buildings with 10 - 20 units	20	2.0%
Units in buildings with more than 20	23	2.3%
Mobile home units	426	42.1%

Source: 2000 Census

Table 6.15, at the end of this section, provides a snapshot of prices and offerings in the market for the Mattawan zip code and nearby zip codes. While closing prices are likely to be slightly less than asking prices, the data show the distribution of prices in the various locations. Although nearly half of the homes in the Mattawan zip code are for sale for \$100,000 to \$200,000, the area has housing available in a wide range of prices.

A closer look at the locations of the for-sale properties with the Mattawan zip code is presented in the map *Mattawan Residential Properties For Sale* (see Appendix). Most of the homes in Mattawan are offered for under \$200,000. The most expensive homes are found around a cluster of inland lakes in Texas Township directly east of Mattawan.

Mobile homes are not typically sold through Realtors and are not well represented in the data. A new mobile home with about 1,400 square feet is available for about \$50,000. Housing costs would include the additional monthly lot fee.

New Construction

The Home Builders Association of Kalamazoo recently held its annual Parade of Homes. Table 6.16 at the end of this section, provides examples of new home construction in all price categories. New construction homes in the Kalamazoo area can be found for well under \$100 per square foot. None of the Parade homes was located in Mattawan, and only one was located in the Mattawan School District.

In this housing market, condominium is a term used to describe various types of housing. Units in adaptive-use loft buildings (which are mostly found in downtown Kalamazoo) and in converted former rental apartment buildings can be found. Other kinds of attached housing such as townhomes, duplexes, and four-plexes may also be called condominiums. The Parade of Homes included three condominiums projects, all with single-story designs.

Condominium/Townhouse Development

A local developer plans to develop 168 condominium units on a Main Street site in Mattawan. The project will consist of 14 three-story buildings, each with 12 units, as well as a clubhouse. The preliminary price schedule is as follows:

- One-bedroom units with 780 square feet will be priced at approximately \$85,000 to \$95,000.
- Two-bedroom, two-bath units with 1,024 to 1,077 square feet will have a base price of approximately \$110,000.
- Three-bedroom units with about 1,300 square feet will be priced at approximately \$130,000.

Garages and carports will be offered on a rental basis. Infrastructure work was scheduled to begin in the fall of 2006, with initial occupancy likely in mid-2007.

An 11-building townhouse development has been proposed for a site at approximately West Robinson Road and Glidden Street.

Rental Market

Mattawan has three rental apartment buildings.

- Creekside Manor, which is available to independent seniors age 62 and older, has 24 one-bedroom apartments with 576 square feet. The monthly rent of \$440 includes heat.
- Pine Hollow Apartments has 32 units, all of which are 2 bedroom/2 bath, 932-square-foot units. The monthly rents range from \$630 to \$670 and include all utilities.
- Westland Park Apartments is a subsidized rental development with 24 units that are available to income-qualified applicants. There are two 500-square-foot, one-bedroom units that rent

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for \$367 to \$487. There are 22 700-square-foot units that rent for \$412 to \$532. Rents include heat.

There are a large number of apartment developments in the Kalamazoo area. One-bedroom units in this market generally range in price from \$450 to \$700 for between 600 and 750 square feet. Two-bedroom units range in price from about \$600 to \$850 for units sized 700 to 1100 square feet. Apartments in the Battle Creek area appear to be similar to those available in Kalamazoo, but slightly less expensive.

Mattawan School System

A major competitive advantage for Mattawan is its highly regarded school system. Table 6.17, at the end of this section, shows how favorably prospective residents would see Mattawan's schools. While many measures can be used to assess schools, this particular comparison shows reading and math proficiency. In reading, Mattawan ranks at the top of the list of 14 school districts. Only two school districts rank higher in math proficiency.

In addition to the strong academic performance, the consolidated campus with elementary, middle, and high schools is an attraction for many families due to its convenience for drop-off/pick-up and outdoor play areas.

Despite its low ranking, Kalamazoo has become more competitive through *Kalamazoo Promise*, which provides college tuition for graduates of its school system. The tuition assistance is based on the length of attendance in the Kalamazoo Public School system and must be used at an in-state school.

MPI Expansion Demand

Table 6.18, at the end of this section, shows the likely incomes of the new MPI Research employees and calculates the rents and housing prices they can afford. Currently, MPI has 1,034 employees with an annual average income of \$40,435. The current salary schedule is projected onto the expected 2,500 new hires.

- 43.1% of the new employees will have incomes of \$35,000 to \$50,000 (in today's dollars), representing the largest income category. With incomes in this range, affordable rents range

from \$875 to \$1,250, and affordable homes range from \$151,400 to \$216,300.

- The second-largest salary category is \$25,000 to \$35,000, accounting for 23.6% of employees. These households are likely to include first-time buyers who will be looking at homes in the \$108,044 to \$151,410 price range. Others are likely to be recent graduates who would prefer to rent.
- Approximately 2.5% of workers have incomes in the range of \$100,000 to \$150,000, making housing of roughly \$400,000 to \$650,000 affordable.

Unlike this simple model, many factors determine actual housing affordability. Equity from a previous home, whether the household has other income earners, stage of life, and outstanding financial commitments are among the factors to be considered. Interest rates, which have been low in recent history, are an overriding factor in determining housing affordability.

Residential Potential

Mattawan is not currently capturing its “fair share” of the residential expansion that is occurring in neighboring Kalamazoo County and in Van Buren County, likely because of competitive issues such as image and perceived willingness to allow development. While Mattawan does offer a range of housing choices, its supply is heavily concentrated at the more affordable end of the market. New developments should seek to provide a wider range or balance of housing products. As highlighted earlier, only 7% of MPI’s employees live in Mattawan, which may be due to the lack of housing products.

With its expressway access, local job opportunities and excellent schools located within short travel times of current and future Mattawan residents, there is potential to develop new housing with a range of products and housing types within the village. Given its past household growth and track record of housing permits, Mattawan could anticipate adding new single-family housing units at the pace of about 15 per year, or about 150 new housing units in a 10-year period.

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If Mattawan can capture higher percentages of growth in Antwerp Township as well as a higher percentage of MPI workers, annual absorption of single-family homes might be about 40 units, or 400 over 10 years.

Attached for-sale housing, particularly stacked flats, has yet to be introduced to the Mattawan market. Over 10 years, up to 250 new attached units, including townhouses and condominiums, might be supported. Seniors may provide some of the demand for attached housing.

Although rental housing will have limited demand in Mattawan, one relatively small, 50-unit project may be supported. Renters, who are likely to be younger households, will continue to be drawn to apartment complexes in nearby Kalamazoo.

In total, these new single-family, condominium, and rental units would add 700 new units to Mattawan over 10 years. This level of housing growth would exceed the household growth in Antwerp Township between 1990 and 2000 (643 households). It would also represent a 41% increase in Mattawan's housing units.

Retail Market

Mattawan Retail

The following grocery and hardware stores are located at the intersection of Main Street and McGillen Avenue. These retailers provide essential everyday goods to Mattawan residents:

- The recently opened Wagoners Grocery Store, with approximately 20,000 square feet.
- Mattawan Hardware has been in the community for approximately 25 years and operates a 5,000 square foot store.

The second concentration of retail is located on Main Street north of I-94. Two pharmacies, Lakeview Pharmacy and Mattawan Pharmacy, are located on Main Street near 52nd Avenue. Main Street Shopping Center has the following stores, restaurants and services:

- Eyecare Center

- Heaven Scent Floral and Gifts
- Java Joint
- Main Street Pub
- Chin-Chin Chinese restaurant

The restaurants are popular and provide a gathering place for community residents. Family Dollar and Movie Gallery are among the new stores across the street from Main Street Shopping Center.

There is a small cluster of retail in Downtown Mattawan. Antique shops have been the main attraction of Downtown, drawing antique hunters from long distances. While the four antique shops help create an appealing small-town environment, the Downtown has few other businesses to draw out-of-town visitors. The convenience food/liquor store serves local residents, and the ice cream shop is an attraction as well.

Village Hall and the police station are located in downtown Mattawan. The post office is located farther north on Main Street. Village Hall and the Post Office are minor activity generators.

One small restaurant is operating in Downtown, while a large former restaurant space is vacant. Restaurants are an obvious missing ingredient. While downtown Mattawan is referred to as historic, none of the buildings is officially so designated.

Competitive Retail Environment

Mattawan residents are likely to do most of their shopping in Kalamazoo and Portage. Although Battle Creek and Benton Harbor may offer some additional options, most goods and services can be found within about 10 miles of Mattawan.

- In the Kalamazoo metropolitan area, the primary retail concentration is located on Main Street, off the Route 131 corridor. West Main Plaza and the redeveloped Maple Hill Pavilion provide over one million square feet of retail space.
- The principle shopping/commercial corridor in the area is along South Westnedge Avenue in Portage. Crossroads Mall has three department store anchors and 767,000 square

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feet. Nearby Southland Mall has retailers such as Barnes & Noble, Circuit City, and OfficeMax, with a total of 400,000 square feet. Other stores in the Corridor include Meijer, Gander Mountain, Lowe's, and Sam's Club. The City's South Westnedge Avenue Enhancement Project will invest nearly \$20 million in public improvements, including street widening and interchange redesign.

Table 6.19, at the end of this section, presents the characteristics of the large area shopping centers located within about 35 miles of Mattawan, and the accompanying map shows their locations.

To the west, Wal-Mart is proposing a site at the Paw Paw interchange, and other retailers are likely to follow. To the east, improvements at the 9th Street interchange are likely to bring new retailers closer to Mattawan.

Table 6.20 and the accompanying map, both at the end of this section, show the locations of major selected retailers.

Retail Potential

A comparison of household expenditure potential and actual sales figures by retail category is a tool for identifying possible retail opportunities. This analysis looks at demand and supply within 2, 6, and 12 miles of Mattawan. Table 6.21, at the end of this section, compares selected characteristics of the three trade areas.

- A two-mile radius represents the retail market in Mattawan and includes an estimated 5,217 households with a median household income of \$55,664.
- A six-mile radius includes Paw Paw to the west and extends east to about 9th Street. This area contains an estimated 33,070 households with a median household income of \$60,037.
- A 12-mile radius covers Portage and much of Kalamazoo. The 191,913 household in this area have a median household income of \$45,757, which is significantly below the median incomes of the smaller trade areas.

Table 6.22, at the end of this section, identifies possible retail opportunities existing in the three trade areas. Consumer

Expenditures is an estimate of spending potential of households in various categories. Retail Sales is the sales that have occurred in stores located in the same trade area. A surplus occurs when sales exceed potential local expenditures, indicating that households from other trade areas are being attracted for shopping. A gap occurs when potential local expenditures are greater than sales, indicating that households living in the trade area are not having their needs met locally, and they are shopping outside the trade area.

- Within the 2-mile Mattawan primary trade area, several categories show a surplus: Automobile and Other Vehicle Dealers, Convenient Grocery, Pharmacies, Gasoline Stations, and Florists. In these categories, Mattawan is drawing shoppers from outside the area.
- Within a 6-mile area, Lawn, Garden Equipment and Supplies, Sporting Goods, and Drinking Places are other categories show a surplus.
- Within a 12-mile radius, additional categories are in the surplus category.

If Mattawan had sites available that have good interstate access and visibility as well as sufficient size to cluster large-format stores, the 6-mile trade area would support the following retail categories that had a gap in the market, not already located in the trade area.

- A Discount Department Store (Meijer or Wal-Mart, for example)
- A Home Improvement Store (Home Depot, for example)
- Several Full-Service Restaurants
- Several Limited-Service Restaurants

These business types would also fill much of the local demand shown for the immediate, two-mile radius. Mattawan alone can support additional restaurants of various types.

Local demand for retail space is estimated to average about 2,000 to 4,000 square feet per year, or about 20,000 to 40,000 square feet of additional retail space over 10 years. With existing grocery, hardware, and drug stores, demand is likely to be from restaurants and specialty stores as well as personal service providers such as beauty shops. Retail expansion on the high end of this range would

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require strong site locations.

If Mattawan can become a regional retail center, significant additional demand can be found within a 6-mile radius. Mattawan may appeal to one or more of the major chains seeking market coverage in the western portion of the larger Kalamazoo area. Large-format stores, including a discount department store or home improvement store might be attracted. Under this scenario the number of retail square feet may increase by about 200,000 square feet. A project of this scale would depend on having sites with excellent visibility from and access to I-94.

Retail demand from local residents, employees, visitors and I-94 travelers presents a unique opportunity to create a "Town Center" that is more than just a retail destination. Combining civic uses, public spaces and residential uses with a hotel, restaurants, and neighborhood/convenience stores would increase the draw and viability of the retail uses as well as create a central activity-hub for the Village, especially if situated near or adjacent to the interchange or the business park.

Industrial Market

As shown in the employment data that were previously presented, heavy manufacturing is still one foundation of the region's economy. Area businesses continue to be important suppliers to the automotive industry. The infrastructure of the area, including its interstate expressway and wastewater treatment facilities, currently accommodates heavier industry, particularly pharmaceutical manufacturing.

Current Trends

Based on its history with the pharmaceutical industry, the state of Michigan has encouraged the development of the area as a bioscience center.

- The Groves is a 248-acres business park with Michigan Technical Education Center as one of its anchors. M-TEC at Kalamazoo Valley Community College, which opened in 2001 with 70,000 square feet, is a collaborative effort by the college, businesses, industries, and foundations to provide job training targeted to the needs of local employers.

- Western Michigan University's Business Technology and Research Park, with 265 acres, is focused on life sciences, advanced engineering, and information technology.
- Midlink Business Park in Kalamazoo provides 340 acres of industrial land and 1.6 million square feet of space.

Industrial Potential

The greater Kalamazoo area has established parks with business incubator environments for new start-up businesses. Mattawan has created a 120-acre business park, with MPI Research as its anchor. As start-up businesses mature, they may seek the type of space and amenities that can be offered in Mattawan. Substantial investment has been made in infrastructure for the business and research parks in the area, and the market is likely to remain highly competitive.

In this competitive environment, and with a struggling manufacturing sector, it is difficult to predict demand for industrial land. An absorption of 5 acres over 10 years could lead to a meaningful job increase in Mattawan. Assuming an FAR of 0.3, 5 acres would support 65,000 square feet.

A more aggressive absorption pace would require full support from the county and state to identify opportunities and perhaps provide incentives. Up to 20 acres of new development may be reasonable.

Hotel Market

Key Measures

Mattawan is located within the Kalamazoo-Battle Creek hotel submarket. Most of the hotels are located in the I-94 corridor, indicating the importance of high visibility and good access. Table 6.23, at the end of this section, lists individual hotels, presented in order of the year in which they opened. An accompanying map shows the locations of the hotels.

Among the 54 properties listed in the hotel inventory, the major chains are well represented by their moderately priced brands

- Accor Hotels has Motel 6 and Red Roof Inn properties.
- Choice Hotels include Quality Inn, Clarion, Comfort Inn, and Econo Lodge.
- Hilton has Hampton Inns.
- Holiday Inn offers Holiday Inn and Holiday Inn Express, and recently added Staybridge Suites.
- Marriott operates Fairfield Inns as well as a Residence Inn for longer-term stays.

Baymont Inn, Best Western, Days Inn, and Ramada are also in this market. Radisson has one property, the Radisson Plaza in Downtown Kalamazoo. A Microtel Inn at the 9th Street interchange is under construction.

Table 6.24, at the end of this section, shows Key Hotel Market Measures as reported by Smith Travel Research. The Kalamazoo-Battle Creek market area, in which Mattawan would compete, is used in this analysis.

Reflecting patterns seen in hotel markets across the country, the Kalamazoo-Battle Creek hotel market experienced a downward trend after September 11, 2001, which devastated the entire travel industry.

- While the average daily rate (ADR) increased from \$61.71 in 2000 to \$68.08 in 2005, the revenue per available room (RevPar) barely increased for region.
- The occupancy rate of 57.1% in 2000 declined through 2004 before improving slightly in 2005, reaching 52.3%.

- In response to the healthy market in 2000, the supply increased significantly in 2001.
- Demand, which is the number of rooms sold, has fallen in every year since 2001.

Table 6.25, at the end of this section, shows occupancy rates peak in the summer months, indicating the importance of leisure travelers to the area.

The completion of new properties in 2006 indicates that some major chains have confidence in this market, despite the overall weak indicators. Opportunities for new hotel development many arise for two reasons.

- Many of the properties in the market area were built in the 1960s and 70s and are becoming functionally obsolete and uncompetitive.
- Newer brands, such as Staybridge Suites, will want to be represented in this market.

Hotel Potential

MPI Research generates significant demand for hotel rooms, with an estimated average of 60 visitors per week who are likely to stay overnight in the area. The more than 3,000 room nights generated by MPI would hypothetically provide nearly 16% of the demand needed for a 75-room hotel, assuming a 70% occupancy rate.

Looking at the pattern of hotel development, it appears that Mattawan is logical location for a new hotel or inn. The I-94 location could intercept leisure travelers and, with the appropriate product, attract business travelers.

Development Program

The Village has not experienced significant residential, industrial or hotel development due to overall economic conditions of the state, traffic congestion related to bridge/road conditions at the interchange, a limited number of properties for sale, and a perceived “unclear” message about its interest in new development.

The economy in the Kalamazoo area has stabilized, and this area of Western Michigan is targeting the life science industries

Mattawan Comprehensive Plan

Section 6: Market Analysis

for further employment growth while continuing to support its traditional manufacturing base. The expansion of MPI, the planned improvements to the I-94 interchange, and a fine school system are among the assets that place Mattawan in position to be more competitive than it has been in the past. This Plan will address many of the more local issues that have kept Mattawan from capturing a more significant share of the growth that is occurring in surrounding townships and communities. The development program outlined in Table 6.9 is based on the assumption that the Plan for Mattawan will be implemented, allowing the community to reach its fullest potential.

The quantity of development in Mattawan will depend on physical constraints, road capacities, and other variables. Specific strategies and concepts for development will be developed during the next two phases of the Comprehensive Plan process.

Table 6.9: Mattawan Development Potential

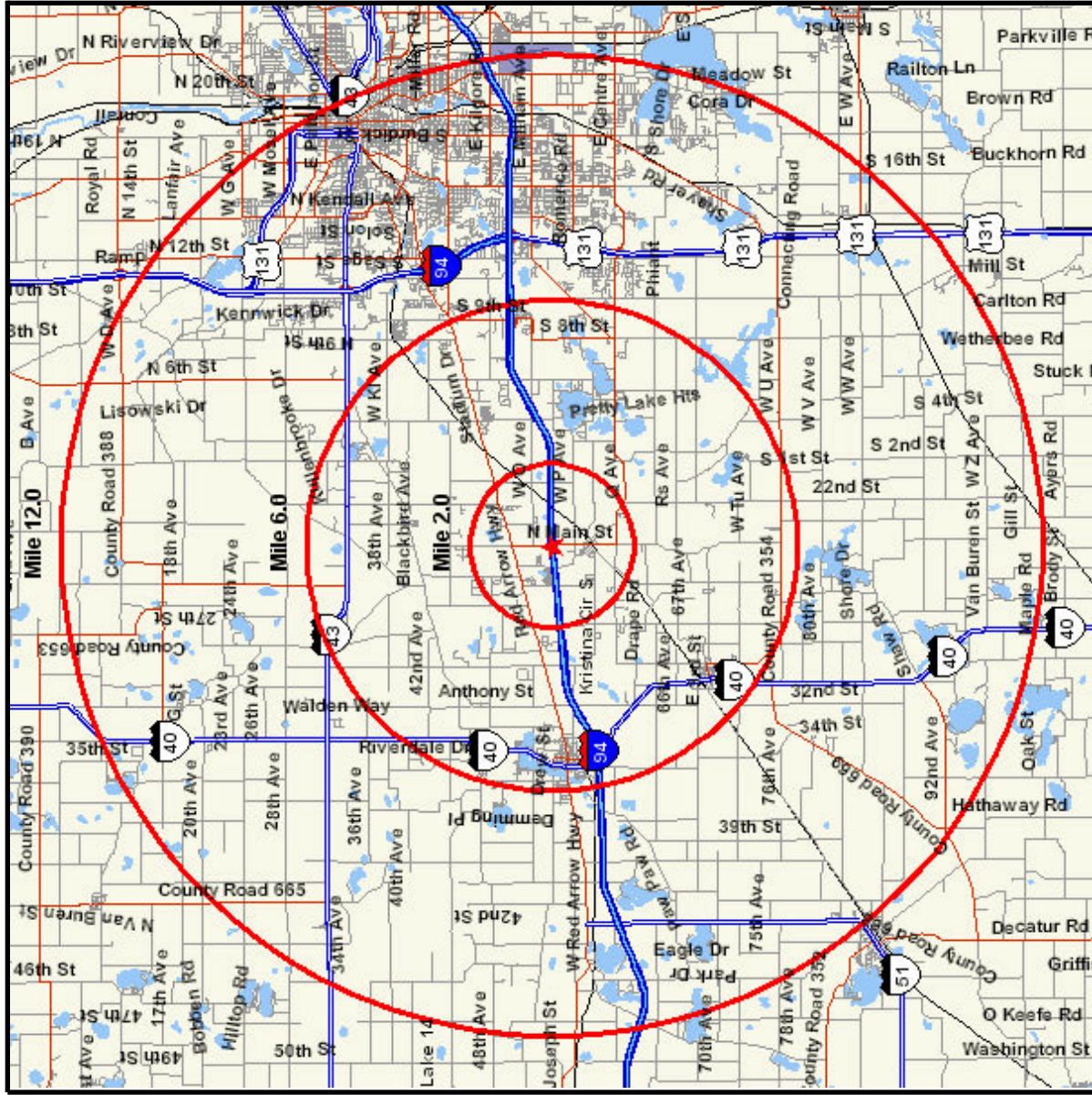
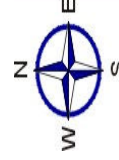
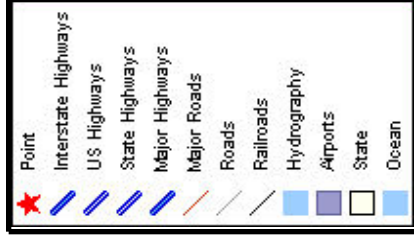
Use	Years 1 to 10	Years 11 to 20	20-Year Total
Single-Family Residential	400 units	600 units	1,000 units
Attached/Condominium	250 units	200 units	450 units
Rental Apartments	50 units	200 units	250 units
Neighborhood Retail	20,000 square feet	20,000 square feet	40,000 square feet
I-94-Oriented Retail	200,000 square feet	150,000 square feet	350,000 square feet
Industrial	20 acres	20 acres	40 acres
Hotels	1 hotel	1 hotel	2 hotels
Local-Serving Office Space	8,000 square feet	10,000 square feet	18,000 square feet

Area Map

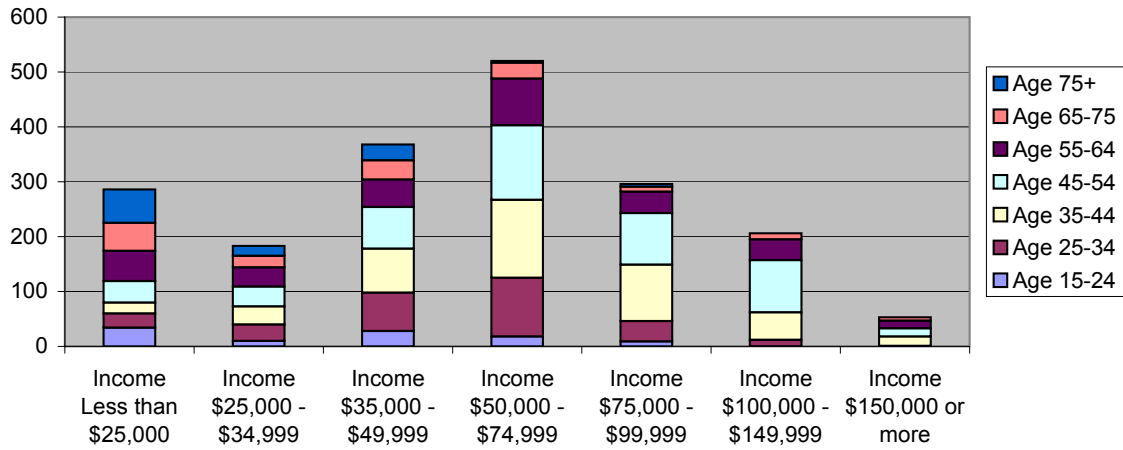
Prepared For:
Project Code:

Order #: 964056347
Site: 01

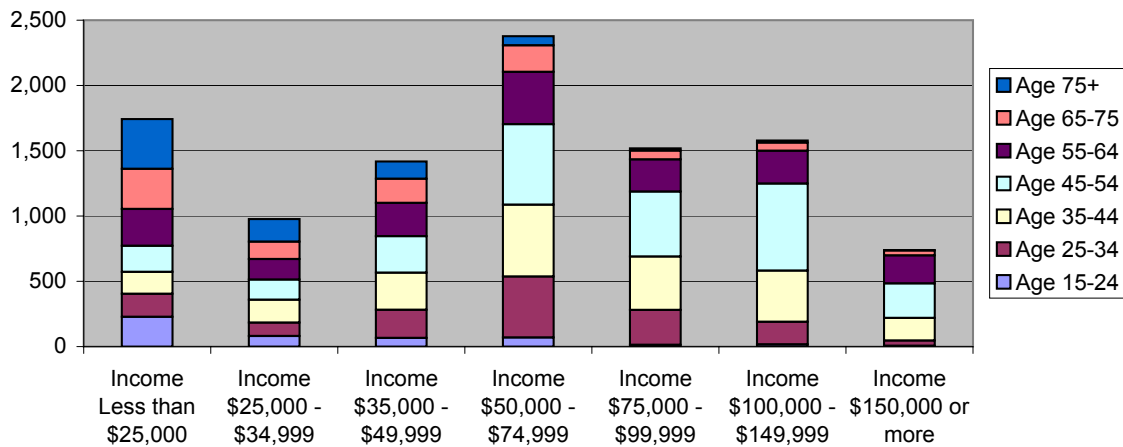
MATTAWAN 2, 6, AND 12 MILES,
I 94 AT N MAIN ST
MATTAWAN, MI 49071
Coord: 42.222900, -85.785400
Radius - See Appendix for Details



Households By Income and Age (0 to 2 miles)



Households By Income and Age (2 to 6 miles)



Households By Income and Age (6 to 12 miles)

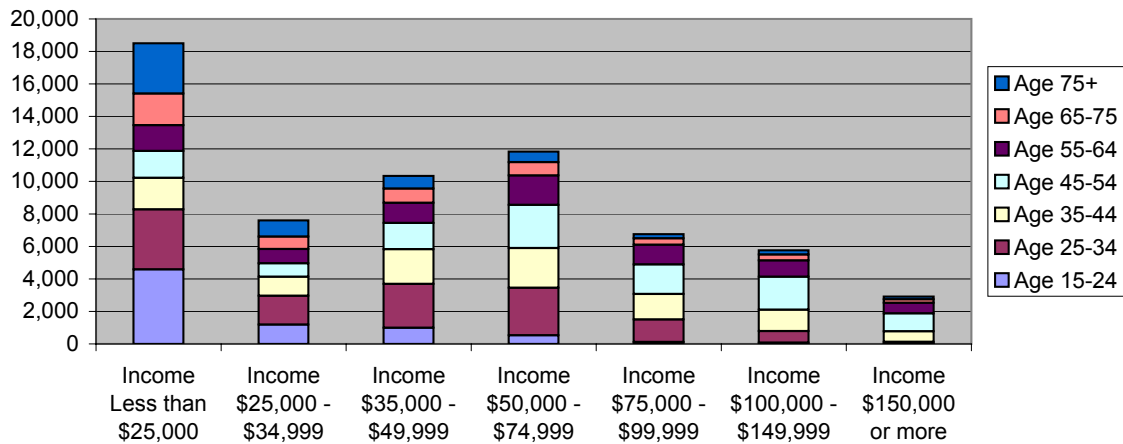


Table 6.11: Estimated Households By Income and Age of Householder 2005

Households within 0 to 2 mile radius:									
	Age 15-24	Age 25-34	Age 35-44	Age 45-54	Age 55-64	Age 65-75	Age 75+	Total	Percent
Income Less than \$25,000	34	26	20	39	55	51	61	286	15.0%
Income \$25,000 - \$34,999	10	30	33	36	35	21	18	183	9.6%
Income \$35,000 - \$49,999	28	70	80	76	50	35	29	368	19.2%
Income \$50,000 - \$74,999	18	107	142	136	85	29	3	520	27.2%
Income \$75,000 - \$99,999	9	37	103	94	39	9	5	296	15.5%
Income \$100,000 - \$149,999	0	12	50	95	38	11	0	206	10.8%
Income \$150,000 or more	0	1	17	15	14	6	0	53	2.8%
Total	99	283	445	491	316	162	116	1,912	100.0%
Percent	5.2%	14.8%	23.3%	25.7%	16.5%	8.5%	6.1%		
Households within 2 to 6 mile radius:									
	Age 15-24	Age 25-34	Age 35-44	Age 45-54	Age 55-64	Age 65-75	Age 75+	Total	Percent
Income Less than \$25,000	228	177	167	200	282	308	381	1,743	16.8%
Income \$25,000 - \$34,999	81	103	175	154	157	134	173	977	9.4%
Income \$35,000 - \$49,999	66	216	284	280	255	185	132	1,418	13.7%
Income \$50,000 - \$74,999	70	467	550	617	400	203	70	2,377	23.0%
Income \$75,000 - \$99,999	13	268	409	498	246	67	17	1,518	14.7%
Income \$100,000 - \$149,999	17	173	392	667	251	62	16	1,578	15.2%
Income \$150,000 or more	6	40	173	265	214	38	3	739	7.1%
Total	481	1,444	2,150	2,681	1,805	997	792	10,350	100.0%
Percent	4.6%	14.0%	20.8%	25.9%	17.4%	9.6%	7.7%		
Households within 6 to 12 mile radius:									
	Age 15-24	Age 25-34	Age 35-44	Age 45-54	Age 55-64	Age 65-75	Age 75+	Total	Percent
Income Less than \$25,000	4,588	3,695	1,940	1,648	1,588	1,957	3,089	18,505	29.0%
Income \$25,000 - \$34,999	1,189	1,776	1,167	827	880	773	994	7,606	11.9%
Income \$35,000 - \$49,999	992	2,700	2,140	1,614	1,237	883	770	10,336	16.2%
Income \$50,000 - \$74,999	536	2,922	2,439	2,659	1,816	818	651	11,841	18.6%
Income \$75,000 - \$99,999	122	1,381	1,573	1,823	1,209	388	262	6,758	10.6%
Income \$100,000 - \$149,999	78	711	1,317	2,033	998	364	261	5,762	9.0%
Income \$150,000 or more	7	125	646	1,100	648	217	175	2,918	4.6%
Total	7,512	13,310	11,222	11,704	8,376	5,400	6,202	63,726	100.0%
Percent	11.8%	20.9%	17.6%	18.4%	13.1%	8.5%	9.7%		

Note: Center of Radius is Intersection of I-94 and Main Street in Mattawan

Source: Claritas, 2006

Table 6.12: Employment Forecasts By Industry, 2002-2012

INDUSTRY TITLE	NAIC	Kalamazoo Area (1)			Benton Harbor Area (2)			
		2002	2012	% Change	2002	2012	% Change	
Total, Wage and Salary Employment		146,610	159,440	12,830	101,310	108,070	6,760	6.7
Goods - Producing Industries		38,770	40,040	1,270	26,990	27,540	550	2
Natural Resources and Mining		70	70	0	110	120	10	3.5
Logging	113	P	P	P	P	P	P	P
Mining (Except Oil and Gas)	212	P	P	P	100	110	10	5.8
Support Activities for Mining	213	P	P	P	P	P	P	P
Construction		6,670	7,580	910	3,670	4,170	500	13.8
Construction of Buildings	236	1,570	1,710	140	1,060	1,140	80	8.3
Heavy and Civil Engineering Construction	237	500	520	20	490	530	40	9.5
Specialty Trade Contractors	238	4,590	5,360	770	2,120	2,500	380	17.5
Manufacturing		32,030	32,390	360	23,210	23,250	40	0.2
Durable Goods		16,300	16,200	-100	17,770	18,080	310	1.7
Wood Products	321	70	60	-10	580	550	-30	-5.4
Nonmetallic Mineral Products	327	530	600	70	P	P	P	P
Primary Metals	331	600	600	0	2,360	2,220	-140	-6
Fabricated Metal Products	332	2,890	2,930	40	2,470	2,540	70	2.8
Machinery	333	2,310	2,270	-40	3,190	3,270	80	2.3
Computer and Electronic Products	334	620	580	-40	860	800	-60	-7
Electrical Equip, Appliances & Components	335	120	130	10	P	P	P	P
Transportation Equipment Manufacturing	336	6,070	5,830	-240	3,830	3,920	90	2.5
Furniture and Related Products	337	740	740	0	1,070	1,130	60	6.2
Miscellaneous Manufacturing	339	2,350	2,460	110	180	200	20	6
Nondurable Goods		15,730	16,200	470	5,440	5,170	-270	-4.9
Food Manufacturing	311	1,230	1,240	10	1,330	1,170	-160	-11.9
Beverage and Tobacco Products	312	200	210	10	P	P	P	P

Source: Michigan Department of Labor and Economic Growth, Bureau of Labor Market Information and Strategic Initiatives, 2006

Table 6.12 (Continued): Employment Forecasts By Industry, 2002-2012

INDUSTRY TITLE	NAIC	Kalamazoo Area (1)			Benton Harbor Area (2)		
		2002	2012	% Change	2002	2012	% Change
Textile Mills	313						
Textile Product Mills	314				P	P	P
Apparel	315	P	P	P	60	60	0
Leather and Allied Products	316						
Paper and Paper Products	322	2,690	2,680	-10	P	P	P
Printing and Related Support Activities	323	950	810	-140	580	620	40
Petroleum and Coal Products	324	P	P	P	1,200	1,100	-100
Chemicals	325	P	P	P	P	P	P
Plastics and Rubber Products	326	3,080	3,320	240	470	500	30
Service - Providing Industries		107,840	119,390	11,550	1,620	1,560	-60
Wholesale Trade					74,330	80,530	6,200
Wholesalers - Durable Goods	423	4,580	5,070	490	3,120	3,470	350
Wholesalers - Nondurable Goods	424	2,890	3,320	430	1,780	2,050	270
Wholesale Electronic Markets and Agents	425	1,070	1,080	10	1,170	1,230	60
Retail Trade					170	190	20
Motor Vehicle and Parts Dealers	441	17,820	18,830	1,010	11,940	12,380	440
Furniture and Home Furnishings Stores	442	1,590	1,750	160	1,600	1,770	170
Electronics and Appliance Stores	443	750	820	70	210	220	10
Building Material and Garden Supply Stores	444	490	530	40	230	270	40
Food and Beverage Stores	445	1,850	2,080	230	1,250	1,520	270
Health and Personal Care Stores	446	2,250	2,170	-80	2,650	2,600	-50
Gasoline Stations	447	1,050	1,150	100	940	1,000	60
Clothing and Clothing Accessories Stores	448	840	880	40	1,170	1,120	-50
Sporting Goods, Hobby, Book, & Music Stor	451	1,210	1,120	-90	420	340	-80
General Merchandise Stores	452	890	1,000	110	290	310	20
Miscellaneous Store Retailers	453	5,280	5,540	260	2,240	2,280	40
Nonstore Retailers	454	1,230	1,380	150	690	730	40
		400	420	20	260	220	-40
					3.7	3.7	

Source: Michigan Department of Labor and Economic Growth, Bureau of Labor Market Information and Strategic Initiatives, 2006

Table 6.12 (Continued): Employment Forecasts By Industry, 2002-2012

INDUSTRY TITLE	NAIC	Kalamazoo Area (1)			Benton Harbor Area (2)		
		2002	2012	% Change	2002	2012	% Change
1* Transportation, Warehousing and Utilities		4,430	4,910	10.8	4,460	4,650	4.1
Air Transportation	481	160	190	16.1	P	P	P
Rail Transportation	482	70	60	-13.2	170	170	0
Water Transportation	483				P	P	P
Truck Transportation	484	980	1,200	22.7	670	740	10.2
Transit & Ground Passenger Transportation	485	50	70	25	60	70	10.2
Pipeline Transportation	486	P	P	P			
Scenic and Sightseeing Transportation	487				P	P	P
Support Activities For Transportation	488	980	1,050	7.7	350	390	40
Postal Service	491	1,110	1,070	-3.7	580	570	-10
Couriers and Messengers	492	P	P	P	220	250	30
Warehousing and Storage	493	380	550	45.9	170	190	20
Utilities	221	P	P	P	2,210	2,240	30
Information		1,880	1,980	5.5	1,110	1,120	10
Publishing Industries (Except Internet)	511	540	570	5.8	590	550	-40
Motion Picture & Sound Recording Industrie	512	140	150	3.5	100	100	0
Broadcasting (Except Internet)	515	P	P	P	P	P	P
Telecommunications	517	990	1,070	8.6	250	270	20
Internet ISPs, Search Portals & Data Process	518	P	P	P	50	60	10
Other Information Services	519				P	P	P
Finance and Insurance		5,480	5,960	8.7	2,760	2,860	100
Credit Intermediation and Related Activities	522	2,670	2,760	3.5	1,720	1,800	80
Securities, Commodity Contracts, Investments	523	P	P	P	P	P	P
Insurance Carriers and Related Activities	524	2,070	2,360	14.1	980	1,000	20
Funds, Trusts and Other Financial Vehicles	525	P	P	P	P	P	P

Source: Michigan Department of Labor and Economic Growth, Bureau of Labor Market Information and Strategic Initiatives, 2006

Table 6.12 (Continued): Employment Forecasts By Industry, 2002-2012

INDUSTRY TITLE	NAIC	Kalamazoo Area (1)			Benton Harbor Area (2)				
		2002	2012	% Change	2002	2012	% Change		
Real Estate and Rental & Leasing		1,890	2,000	110	5.7	900	940	40	4.2
Real Estate	531	1,480	1,550	70	4.7	530	550	20	2.4
Rental and Leasing Services	532	P	P	P	P	370	390	20	6.8
Lessors of Nonfinancial Intangible Assets	533	P	P	P	P				
Professional and Business Services		12,540	14,460	1,920	15.3	8,010	9,300	1,290	16.1
Professional, Scientific, & Tech Services	541	4,170	4,950	780	18.9	2,430	2,630	200	8.4
Management of Companies and Enterprises	551	370	430	60	17.5	840	870	30	3.9
Administrative and Support Services	561	7,790	8,830	1,040	13.5	4,310	5,330	1,020	23.5
Waste Management & Remediation Services	562	230	240	10	8	430	470	40	8.8
2* Education and Health Services		31,620	35,360	3,740	11.8	21,610	23,520	1,910	8.9
3* Educational Services	611	15,510	16,690	1,180	7.6	11,730	12,300	570	4.9
Ambulatory Health Care Services	621	4,860	5,650	790	16.3	2,900	3,350	450	15.6
4* Hospitals	622	5,870	6,260	390	6.6	4,380	4,750	370	8.4
Nursing and Residential Care Facilities	623	3,250	3,970	720	22.1	1,960	2,310	350	17.7
Social Assistance	624	2,140	2,800	660	31	640	820	180	27.5
Leisure and Hospitality		13,490	15,160	1,670	12.4	9,370	10,410	1,040	11.1
Performing Arts and Spectator Sports	711	450	490	40	8.6	80	70	-10	-3.9
Museums, Historical Sites and Similar	712	200	240	40	16.7	60	70	10	8.2
Amusement, Gambling and Recreation	713	1,200	1,440	240	19.6	1,060	1,320	260	24.9
Accommodation	721	1,010	1,080	70	7.3	970	1,080	110	11.1
Food Services and Drinking Places	722	10,620	11,910	1,290	12.2	7,200	7,870	670	9.3
Other Services		8,430	9,740	1,310	15.6	5,620	6,280	660	11.8
Repair and Maintenance	811	1,660	1,920	260	15.8	1,090	1,190	100	8.5
Personal and Laundry Services	812	1,820	1,910	90	5.3	890	890	0	0.7
Membership Associations and Organizations	813	4,960	5,920	960	19.4	3,640	4,200	560	15.6

Source: Michigan Department of Labor and Economic Growth, Bureau of Labor Market Information and Strategic Initiatives, 2006

Table 6.12 (Continued): Employment Forecasts By Industry, 2002-2012

INDUSTRY TITLE	NAIC	Kalamazoo Area (1)			Benton Harbor Area (2)				
		2002	2012	% Change	2002	2012	% Change		
5*Government		5,680	5,910	230	4	5,440	5,610	170	3
Federal, Excluding Postal Service	919	260	280	20	6.1	170	170	0	-1.2
State, Excluding Education & Hospitals	929	870	830	-40	-4.7	830	800	-30	-4.7
Local, Excluding Education & Hospitals	939	4,550	4,800	250	5.6	4,440	4,640	200	4.6

TABLE FOOTNOTES:

1* Includes U.S. Postal Services

2* Includes State & Local Government Hospitals and Education

3* Includes State & Local Government Education

4* Includes State & Local Government Hospitals

5* Excludes U.S. Postal Services and State & Local Government Hospitals and Education

NOTES:

(1) Kalamazoo Area includes Kalamazoo and St. Joe Counties.

(2) Benton Harbor Area includes Berrien, Cass, and Van Buren Counties.

Employment totals may not add up due to rounding.

Industries with less than five workers were omitted from the table but are still represented in the totals and sub-totals.

Percent change is based on unrounded numbers.

NAIC - North American Industrial Classification System.

p - Protected Data.

Source: Michigan Department of Labor and Economic Growth, Bureau of Labor Market Information and Strategic Initiatives, 2006

Table 6.13: Detached Single Family Home Building Permits

	1999	2000	2001	2002	2003	2004	2005*	TOTAL
KALAMAZOO COUNTY								
Alamo township	16	15	0	0	15	0	0	46
Augusta village	1	1	0	0	3	0	0	5
Charleston township	15	3	0	0	21	0	0	39
Comstock township	82	75	80	69	84	101	66	491
Cooper township	52	68	0	0	55	52	42	227
Galesburg	5	3	0	0	4	0	0	12
Kalamazoo	12	22	37	23	33	61	0	188
Unincorporated Area	237	216	224	236	256	253	203	1,422
Kalamazoo township	61	64	40	24	28	42	0	259
Oshtemo township	88	94	98	91	102	105	167	578
Parchment	1	0	1	0	0	0	0	2
Portage	191	203	204	310	284	209	154	1,401
Richland village	8	14	0	0	14	0	0	36
Ross township	32	29	0	0	24	0	0	85
Schoolcraft village	2	2	0	0	1	0	0	5
Texas township	115	98	141	157	180	190	160	881
Total Kalamazoo County	918	907	825	910	1,104	1,013	792	5,677
VAN BUREN COUNTY								
Almena township	62	60	0	0	70	0	0	192
Antwerp township	73	71	0	0	83	0	0	227
Arlington township	16	15	0	0	7	0	0	38
Bangor	4	2	0	0	2	0	0	8
Bangor township	15	14	0	0	10	0	0	39
Bloomington township	4	21	18	20	27	27	0	117
Breedsville village	0	0	0	0	0	0	0	0
Columbia township	42	25	0	0	20	0	0	87
Covert township	14	13	0	0	13	0	0	40
Decatur township	9	11	0	0	15	0	0	35
Decatur village	6	3	0	0	1	1	3	14
Geneva township	24	23	0	0	3	0	0	50
Gobles	2	2	0	0	2	0	0	6
Hamilton township	15	14	0	0	10	0	0	39
Hartford	6	2	0	0	4	0	0	12
Hartford township	12	12	0	0	11	0	0	35
Keeler township	10	6	0	0	11	0	0	27
Lawrence township	15	14	16	18	21	22	0	106
Lawrence village	4	1	0	0	0	0	0	5
Lawton village	5	5	0	0	5	0	0	15
Mattawan village	31	30	0	0	35	0	0	96
Paw Paw township	31	9	0	0	16	0	0	56
Paw Paw village	1	5	5	3	0	1	0	15
Pine Grove township	20	19	0	0	21	0	0	60
Porter township	20	14	0	0	20	0	0	54
South Haven	23	21	0	0	21	0	0	65
Total Van Buren County	464	412	39	41	428	51	3	1,438
GRAND TOTAL	2,300	2,226	1,689	1,861	2,636	2,077	1,587	7,115
* 2005 permits through October								

Source: State of Michigan, 2006

Table 6.14: Residential Building Permits for Buildings with Attached Units

Kalamazoo and Van Buren Counties																	
	1999	2000	2001	2002	2003	2004	2005 thru		TOTAL	Avg Units Per Building							
							Bldgs	Units			Bldgs	Units					
Kalamazoo County																	
Comstock TS	1	5	6	180	7	98	0	0	1	30	0	0	0	0	15	313	20.9
Cooper TS	1	2	0	0	0	0	0	0	8	114	6	82	0	0	15	198	13.2
Kalamazoo	7	60	1	24	1	8	6	120	6	40	26	108	0	0	47	360	7.7
Kalamazoo TS	7	19	17	50	1	2	2	21	19	140	0	0	0	0	46	232	5.0
Oshtemo TS	17	59	21	326	8	26	9	29	61	504	32	92	4	11	152	1,047	6.9
Portage	1	4	0	0	1	4	8	62	9	60	3	12	2	8	24	150	6.3
Ross TS	1	2	0	0	0	0	0	0	0	0	0	0	0	0	0	-	-
Van Buren County																	
Paw Paw village	0	0	3	24	3	15	1	5	1	2	0	0	0	0	8	46	5.8
South Haven	0	0	2	11	0	0	0	0	7	36	0	0	0	0	9	47	5.2
TOTAL	35	151	50	615	21	153	26	237	112	926	67	294	6	19	316	2,393	7.6

Source: Michigan Department of History, Arts and Libraries, 2006

Table 6.15: Current Listings of Homes for Sale -- Mattawan and Other Selected Zip Codes

	MATTAWAN			PORTAGE							
	Zip Code 49071			Zip Code 49024							
	SF Attached	All	Percent	SF	All	Percent					
Under \$100,000:	3	0	3	2.4%	18	8	26	7.8%			
\$100,000 to \$200,000	57	0	57	46.3%	149	18	167	50.0%			
\$200,000 to \$300,000	36	0	37	30.1%	87	5	105	31.4%			
\$300,000 to \$500,000	24	0	24	19.5%	24	0	24	7.2%			
Over \$500,000	<u>2</u>	<u>0</u>	<u>2</u>	1.6%	<u>11</u>	<u>0</u>	<u>12</u>	3.6%			
Total	122	0	123		289	31	334				
KALAMAZOO											
							Zip Code 49006				
							Zip Code 49009				
							Zip Code 49001:				
	SF Attached	All	Percent	SF	All	Percent	SF Attached	All	Percent		
Under \$100,000:	8	7	16	3.4%	28	17	46	27.4%	176	60.8%	
\$100,000 to \$200,000	126	40	169	36.0%	100	5	109	64.9%	109	35.6%	
\$200,000 to \$300,000	137	15	152	32.3%	7	3	10	6.0%	1	2.8%	
\$300,000 to \$500,000	98	1	102	21.7%	0	1	3	1.8%	1	0.8%	
Over \$500,000	<u>30</u>	<u>0</u>	<u>31</u>	6.6%	<u>0</u>	<u>0</u>	<u>0</u>	0.0%	<u>0</u>	0.0%	
Total	399	63	470		135	26	168		287	14	357

Source : Realtor.com June 26, 2006

Table 6.16: Summary of New Construction Homes Included in Home Builders Association of Kalamazoo's "Parade of Homes"

<u>Builder</u>	<u>Address</u>	<u>Community</u>	<u>Sq. Ft.</u>	<u>BRs</u>	<u>Baths</u>	<u>Price Range</u>	<u>Price Per Sq Ft</u>
Starting Prices Under \$200,000							
RDC Builders	2103 Petoskey Drive	Otsego	1,714	3	2.5	\$179,900	\$105
Cornerstone Construction	290 Morhouse Drive	Galesburg	1,774	3	2.5	\$199,900	\$113
Hometown Building Co.	2132 Long Leaf Street	Kalamazoo	1,491	3	2	\$125,000-\$150,000	\$84 - \$101
Allen Edwin Homes	5921 Coddington Lane	Kalamazoo	1,822	3	2.5	\$125,000-\$150,000	\$69 - \$82
RDI Companies	1361 South Village Circle	Kalamazoo	1,376	2	2.5	\$150,000-\$175,000	\$109 - \$127
Allen Edwin Homes	4755 Salzburg Circle	Portage	2,227	4	2.5	\$150,000-\$175,000	\$67 - \$79
Allen Edwin Homes	1224 Laurel Wood Street	Kalamazoo	2,860	4	2.5	\$150,000-\$175,000	\$52 - \$61
Lifestyle Properties Inc.	1967 Brighton Lane	Portage	1,337	2	2	\$175,000-\$200,000	\$131 - \$150
First American Construction	32950 Bordeaux Avenue	Paw Paw	1,500	2	2	\$175,000-\$200,000	\$117 - \$133
Allen Edwin Homes	1046 Laurel Wood Street	Kalamazoo	2,128	4	2.5	\$175,000-\$200,000	\$82 - \$94
Loomis Construction	8371 Millstone Court	Kalamazoo	2,200	3	3	\$175,000-\$200,000	\$80 - \$91
Allen Edwin Homes	6503 Buckham Wood Drive	Kalamazoo	3,016	4	2.5	\$175,000-\$200,000	\$58 - \$66
Starting Prices \$200,000 to \$299,000							
Villas of Stonehenge	2673 Bluestone Circle	Kalamazoo	1,861	2 or 3	2	\$200,000-\$250,000	\$107 - \$134
Pierson-Gibbs Homes Inc.	7637 Prairie Crossing Lane	Richland	2,100	4	2.5	\$200,000-\$250,000	\$95 - \$119
Allen Edwin Homes	520 Ludington Avenue	Portage	3,423	5	2.5	\$200,000-\$250,000	\$58 - \$73
Allen Edwin Homes	6594 Annandale Drive	Kalamazoo	4,212	4	2.5	\$200,000-\$250,000	\$47 - \$59
American Village Builders	1195 Harrier Ridge	Oshtemo	1,985	3	2.5	\$226,695	\$114
T.A. Scott Construction Co.	11942 Prairie Edge Street	Schoolcraft	2,320	3	2	\$239,900	\$103
Legacy Showcase Homes	5401 Misty Creek Drive	Kalamazoo	1,800	3	2	\$250,000-\$300,000	\$139 - \$167
Miller Brothers Builders Inc.	11926 Anchor Lane	Three Rivers	1,832	3	2	\$250,000-\$300,000	\$136 - \$164
Craig Wenke Builders Inc.	7297 Stoney Woods Drive	Kalamazoo	2,350	4	2.5	\$250,000-\$300,000	\$106 - \$128
C & E Construction	7820 Elk	Portage	2,736	4	2.5	\$250,000-\$300,000	\$91 - \$110
T.A. Scott Construction Co.	2360 Avalon Woods Drive	Portage	n/a	3	2.5	\$269,900	n/a
Don Fillingham Construction	7227 Owen Hills Drive	Kalamazoo	2,350	4	2.5	\$289,900	\$123

Table 6.16 (Continued): Summary of New Construction Homes Included in Home Builders Association of Kalamazoo's "Parade of Homes"

<u>Builder</u>	<u>Address</u>	<u>Community</u>	<u>Sq. Ft.</u>	<u>BRs</u>	<u>Baths</u>	<u>Price Range</u>	<u>Price Per Sq Ft</u>
Starting Prices \$300,000 to \$400,000							
Chipman Construction Inc.	4842 Cottagewood Drive	Kalamazoo	1,803	2	2	\$300,000-\$375,000	\$166 - \$208
Hoeksema Builders	5128 Shane	Kalamazoo	1,850	3	2.5	\$300,000-\$375,000	\$162 - \$203
Brown Custom Homes	8843 Pine Acres Drive	Kalamazoo	2,075	3	2	\$300,000-\$375,000	\$145 - \$181
American Village Builders	8730 Oakland Hills Circle	Portage	2,209	3	2	\$300,000-\$375,000	\$136 - \$170
Kozar Construction Inc.	10050 Tuscan Court	Portage	2,820	4	3.5	\$300,000-\$375,000	\$106 - \$133
Cornerstone Construction	8711 Camomile Drive	Augusta	2,675	3	3	\$349,900	\$131
Niblick Builders	15284 Alister MacKenzie	Augusta	2,977	4	3	\$375,000-\$500,000	\$126 - \$168
Crossroads Building Corp.	8093 Bay Arbor Drive	Augusta	3,900	4	4	\$375,000-\$500,000	\$96 - \$128
Powell Custom Homes	5549 Embassy Street	Kalamazoo	3,944	5	4	\$375,000-\$500,000	\$95 - \$127
Dean Ingraham Builder	5526 Coronet	Kalamazoo	4,200	5	4	\$375,000-\$500,000	\$89 - \$119
Cody's Quality Builders	1750 Toscana	Kalamazoo	n/a	4	3.5	\$375,000-\$500,000	n/a
\$500,000 or More							
Addco Builders	9121 Austin Drive	Portage	2,479	3	3	\$500,000	\$202
Waite Custom Homes	1259 West Gull Lake Dr.	Richland	3,000	4	3.5	Over \$500,000	Over \$167
Niblick Builders	12324 Cranes Avenue	Augusta	3,200	4	3.5	Over \$500,000	Over \$156
American Village Builders	6469 East Bay Lane	Richland	3,304	4	3.5	Over \$500,000	Over \$151
TMV Properties	5829 Denali Street	Kalamazoo	6,150	6	5.5	Over \$500,000	Over \$81

Source: The Home Builders Association of Greater Kalamazoo, June 2006

Table 6.17: Comparison of Mattawan and Surrounding School Districts (Ranked By Reading Proficiency)

School District	County	Reading Proficiency (%)	Math Proficiency (%)	Enrollment	Economically Disadvantaged Enrollment	# Schools	Schools with "Report Card"		
							A	B	C
Mattawan Consolidated Schools	Van Buren	92.4	77.1	3,504	13%	4	2	2	0
Schoolcraft Community Schools	Kalamazoo	90.8	74.0	1,212	12%	4	2	2	0
Portage Public Schools	Kalamazoo	90.0	81.0	9,042	16%	13	10	3	0
Paw Paw Public Schools	Van Buren	86.4	71.3	2,366	31%	4	4	0	0
Gull Lake Community Schools	Kalamazoo	86.2	81.6	3,012	13%	6	4	2	0
Gobles Public School District	Van Buren	85.7	66.0	1,050	28%	3	0	3	0
Vicksburg Community Schools	Kalamazoo	85.7	71.7	2,791	20%	5	3	2	0
Galesburg-Augusta Community	Kalamazoo	85.2	64.0	1,360	37%	4	1	3	0
Comstock Public Schools	Kalamazoo	74.9	64.4	2,903	53%	6	0	6	0
Lawton Community School District	Van Buren	73.5	60.2	1,104	43%	3	1	1	1
Decatur Public Schools	Van Buren	72.5	61.0	1,200	57%	4	0	2	1
Bloomington Public Schools	Van Buren	72.5	56.5	1,503	70%	4	0	2	2
Bangor Public Schools	Van Buren	66.9	51.0	1,524	68%	4	0	2	2
Kalamazoo Public School District	Kalamazoo	64.2	52.2	10,580	61%	22	1	7	14

Source: Michigan Department of Education and Standard & Poor's School Matters, June 2006

Table 6.18: Estimated Housing Demand from New MPI Employees

Salary Range	Current Jobs		New Jobs		Housing Affordability			
	Jobs	Percent	Jobs	Percent	Rent	Monthly Mortgage Payment	Supportable Mortgage	Affordable Home Price
Less than \$25,000	170	16.4%	411	16.4%	-- \$625	-- \$583	-- \$97,240	-- \$108,044
\$25,000 - \$35,000	244	23.6%	590	23.6%	\$625 - \$875	\$583 - \$817	\$97,240 - \$136,269	\$108,044 - \$151,410
\$35,000 - \$50,000	446	43.1%	1,078	43.1%	\$875 - \$1,250	\$817 - \$1,167	\$136,269 - \$194,646	\$151,410 - \$216,273
\$50,000 - \$75,000	96	9.3%	232	9.3%	\$1,250 - \$1,875	\$1,167 - \$1,750	\$194,646 - \$291,885	\$216,273 - \$324,317
\$75,000 - \$100,000	45	4.4%	109	4.4%	\$1,875 - \$2,500	\$1,750 - \$2,333	\$291,885 - \$389,125	\$324,317 - \$432,361
\$100,000 - \$150,000	27	2.6%	65	2.6%	\$2,500 - \$3,750	\$2,333 - \$3,500	\$389,125 - \$583,771	\$432,361 - \$648,634
Over \$150,000	6	0.6%	15	0.6%	\$3,750 --	\$3,500 --	\$583,771 --	\$648,634 --
Total	1,034	100.0%	2,500	100.0%				
	Average \$40,435							

Notes:

Temporary, part-time, and intern positions included in jobs.

Affordable rent is calculated as 30% of income.

Affordable home prices based on following assumptions: Principal and interest payment is 28% of income, interest rate is fixed at 6% on a 30-year mortgage, and buyer has made a 10% downpayment.

Source: Goodman Williams Group, 2006

Table 6.19: Shopping Centers over 300,000 Square Feet Within 35 Miles of Mattawan, Michigan

<u>Name</u>	<u>Location</u>	<u>Community</u>	<u>GLA</u>	<u>Anchors</u>	<u>Distance*</u>
West Main Plaza	5161 W Main St	Kalamazoo, MI	400,000	Harding's Market, Kohl's, Lowe's Home Improvement, MC Sports	9
Maple Hill Pavilion	5050 W Main St	Kalamazoo, MI	670,786	Hobby Lobby, Marshalls, Office Max, Target, Value City Furniture, PetSmart, DSW	9
Southland Mall	6060 S Westnedge Ave	Portage, MI	400,000	Barnes & Noble, Circuit City, JCPenney Home Store, Kohl's, OfficeMax, T.J. Maxx	10
The Crossroads	6650 S Westnedge Ave	Portage, MI	766,629	JCPenney, Marshall Fields, Sears	10
Minges Brook Mall	5700 Beckley Rd	Battle Creek, MI	400,000	ABC Warehouse, Felpausch Grocery, Gold's Gym, Target	31
Lakeview Square Mall	5775 Beckley Rd	Battle Creek, MI	607,095	JCPenney, Marshall Fields, Sears	31
Harper Village Shopping Center	12765 Harper Village Dr	Battle Creek, MI	650,000	Bed Bath & Beyond, Best Buy, Kohl's, Meijer, Menards, Michaels, T.J. Maxx	32
Fairplain Plaza	1000 E Napier Ave	Benton Harbor, MI	505,000	Dunham's Sporting Goods, Office Depot, Old Navy, Target, T.J. Maxx	34
The Orchards Mall	1800 Pipestone Rd	Benton Harbor, MI	528,471	Elder-Beerman, JCPenney, Sears	34

*Miles direct distance from Mattawan

Source: National Research Bureau Shopping Center Directory and Goodman Williams Group, 2006

Table 6.20: Large Format National Retailers Within 35 Miles of Mattawan

Superstores		
Wal-Mart Superstores	412 Cross Oaks Mall	Plainwell, MI
	201 73Rd Street	South Haven, MI
	6020 B Drive North	Battle Creek, MI
	1400 Mall Drive	Benton Harbor, MI
Wal-Mart	501 S 9Th Street	Kalamazoo, MI
	1618 West M 43	Hastings, MI
	4024 Elkhart Road	Goshen, IN
	8350 Shaver Road	Portage, MI
	6065 Gull Road	Kalamazoo, MI
Meijer	6660 W Main St	Kalamazoo , MI
	8850 Shaver Rd	Portage , MI
	5121 S Westnedge	Portage , MI
	5800 Gull Rd	Kalamazoo , MI
	1195 M-89	Plainwell , MI
	1920 Pipestone Rd	Benton Harbor, MI
	800 US 131	Three Rivers, MI
	2177 W Columbia Ave	Battle Creek, MI
	6405 B Drive North	Battle Creek, MI
Target	5350 W Main St	Kalamazoo, MI
	6839 S Westnedge Ave	Portage, MI
	5700 Beckley Rd	Battle Creek, MI
	960 Fairplain Dr	Benton Harbor, MI
General Merchandise Stores		
Kohl's	12765 Harper Village Dr	Battle Creek, MI
	6100 S. Westnedge Ave	Kalamazoo, MI
	5159 W. Main St.	Kalamazoo, MI
Sears	6780 S Westnedge Ave	Portage , MI
	5575 B Drive N	Battle Creek, MI
	1860 Pipestone Rd	Benton Harbor, MI
Kmart	4620 Stadium Dr	Kalamazoo, MI
	6355 S Westnedge	Portage, MI
	200 Capital Ave	Battle Creek, MI
	69080 M-66	Sturgis, MI
Big Lots	4425 S Westnedge	Kalamazoo, MI
	1326 W Broadway	Three Rivers, MI
	54 S 20th St	Battle Creek, MI
	1800 S Route M-139	Benton Harbor, MI
Electronics and Appliance Stores		
Best Buy	6900 S Westnedge Ave	Portage, MI
	12765 Harper Village Dr	Battle Creek, MI
	1515 Orchard Xing	Benton Harbor, MI
Circuit City	6026 S Westnedge Ave	Portage, MI
Building Material, Garden Equipment Stores		
Home Depot	6685 S Westnedge	Portage, MI
	1227 M89	Plainwell, MI
	1301 S US 131	Three Rivers, MI
	2075 Pipestone Rd	Benton Harbor, MI

Table 6.20 (Continued): Large Format National Retailers Within 35 Miles of Mattawan

Menards	6800 W Main St 879 Mall Drive	Kalamazoo, MI Portage, MI
Lowe's	5125 W Main St 5108 S Westnedge Ave 6122 B Drive North 1300 Mall Dr	Kalamazoo, MI Portage, MI Battle Creek, MI Benton Harbor, MI
Clothing and Clothing Accessories Stores		
Marshalls	5072 W Main St	Kalamazoo, MI
T.J. Maxx	6125 S Westnedge Ave 12765 Harper Village Dr	Portage, MI Battle Creek, MI
Old Navy	6024 S Westnedge Ave 5775 Beckley Rd 1040 Fairplain Rd	Portage, MI Battle Creek, MI Benton Harbor, MI
Sporting Goods, Hobby, Book, and Music Stores		
Barnes & Noble	6134 S Westnedge Ave 5701 Beckley Rd 1800 Pipestone Rd	Portage, MI Battle Creek, MI Benton Harbor, MI
Michaels	6601 S Westnedge Ave 12765 Harper Village Dr. Suite 110	Portage, MI Battle Creek, MI
Hobby Lobby	5030 W Main St	Kalamazoo, MI
Jo-Ann Fabrics	6151 S. Westnedge 62 S. 20th St. 1970 Pipestone Rd.	Portage, MI Battle Creek, MI Benton Harbor, MI
Dunham's Sports	5420 Beckley Road 1000 Napier 6420 South Westnedge 1320 W. Broadway Rd.	Battle Creek, MI Benton Harbor, MI Portage, MI Three Rivers, MI
Warehouse Clubs		
Sam's Club	7021 S Westnedge Ave 12737 Cotton Lake Rd	Portage, MI Battle Creek, MI
Office Supply Stores		
Office Depot	4425 S Westnedge Ave 1000 Napier Ave	Kalamazoo, MI Benton Harbor, MI
OfficeMax	5294 W Main St 6212 S Westnedge	Kalamazoo, MI Kalamazoo, MI
Staples	6128 Beckley Dr North 1485 Mall Dr	Battle Creek, MI Benton Harbor, MI
Furniture and Home Furnishings Stores		
Cost Plus	6601 S. Westnedge Avenue	Portage, MI
Bed, Bath & Beyond	5930 South Westnedge Avenue 12765 Harper Village Drive	Portage, MI Battle Creek, MI
Art Van Furniture	6100 B Dr. North 550 Ring Rd.	Battle Creek, MI Portage, MI
Furniture Row	5475 Beckley Rd. 6934 S. Westnedge Ave.	Battle Creek, MI Portage, MI

Source: Goodman Williams Group, 2006

Table 6.21: Population and Household Profiles

	2 Mile Radius		6 Mile Radius		12 Mile Radius	
	Number	Percent	Number	Percent	Number	Percent
Population						
2010 Projection	5,656		35,927		196,726	
2005 Estimate	5,217		33,070		191,913	
2000 Census	4,739		30,024		186,991	
1990 Census	4,292		24,799		172,726	
Median Age 2005	35.13		37.27		35.95	
Households						
2010 Projection	2,102		13,433		78,448	
2005 Estimate	1,919		12,256		75,989	
2000 Census	1,720		10,982		73,181	
1990 Census	1,485		8,753		64,688	
Growth 2005 - 2010		9.5%		9.6%		3.2%
Growth 2000 - 2005		11.6%		11.6%		3.8%
Growth 1990 - 2000		15.8%		25.5%		13.1%
2005 Est. Households by Household Income						
Income Less than \$15,000	118	6.1%	859	7.0%	10,891	14.3%
Income \$15,000 - \$24,999	170	8.9%	1,167	9.5%	9,644	12.7%
Income \$25,000 - \$34,999	185	9.6%	1,158	9.4%	8,767	11.5%
Income \$35,000 - \$49,999	368	19.2%	1,782	14.5%	12,122	16.0%
Income \$50,000 - \$74,999	522	27.2%	2,897	23.6%	14,739	19.4%
Income \$75,000 - \$99,999	294	15.3%	1,814	14.8%	8,569	11.3%
Income \$100,000 - \$149,999	206	10.7%	1,786	14.6%	7,548	9.9%
Income \$150,000 - \$249,999	44	2.3%	594	4.8%	2,748	3.6%
Income \$250,000 - \$499,999	8	0.4%	147	1.2%	716	0.9%
Income \$500,000 or more	3	0.2%	54	0.4%	246	0.3%

Table 6.21 (Continued): Population and Household Profiles

	2 Mile Radius		6 Mile Radius		12 Mile Radius	
	Number	Percent	Number	Percent	Number	Percent
2005 Est. Average Household Income	\$63,570		\$72,939		\$59,958	
2005 Est. Median Household Income	\$55,664		\$60,037		\$45,757	
2005 Est. Per Capita Income	\$23,415		\$27,266		\$24,194	
2005 Est. Households by Household Type	1,919		12,256		75,989	
Family Households	1,485		9,209		45,528	
Nonfamily Households	434		3,047		30,461	
2005 Est. Households by Household Size						
1-person household	349	18.2%	2,411	19.7%	22,563	29.7%
2-person household	630	32.8%	4,300	35.1%	26,327	34.6%
3-person household	410	21.4%	2,263	18.5%	11,564	15.2%
4-person household	339	17.7%	2,120	17.3%	9,668	12.7%
5-person household	148	7.7%	833	6.8%	3,936	5.2%
6-person household	33	1.7%	235	1.9%	1,370	1.8%
7 or more person household	10	0.5%	93	0.8%	561	0.7%
2005 Est. Average Household Size	2.72		2.66		2.38	
2005 Est. Household Type, Presence Own Children						
Single Male Householder	167	8.7%	1,095	8.9%	9,365	12.3%
Single Female Householder	182	9.5%	1,316	10.7%	13,198	17.4%
Married-Couple Family, own children	599	31.2%	3,757	30.7%	15,918	20.9%
Married-Couple Family, no own children	560	29.2%	3,862	31.5%	19,455	25.6%
Male Householder, own children	60	3.1%	277	2.3%	1,354	1.8%
Male Householder, no own children	34	1.8%	164	1.3%	1,055	1.4%
Female Householder, own children	169	8.8%	753	6.1%	5,185	6.8%
Female Householder, no own children	64	3.3%	396	3.2%	2,561	3.4%
Nonfamily, Male Householder	61	3.2%	403	3.3%	4,401	5.8%
Nonfamily, Female Householder	25	1.3%	233	1.9%	3,497	4.6%

Source: Claritas, Inc., 2006

Table 6.22: Opportunity Gap Analysis (2005) - Two, Six and 12-Mile Radii

	Two-Mile Radius			Six-Mile Radius			12-Mile Radius		
	Consumer			Consumer			Consumer		
	Expenditures	Retail Sales	Gap/Surplus	Expenditures	Retail Sales	Gap/Surplus	Expenditures	Retail Sales	Gap/Surplus
Total Retail Sales	81,824,167	78,936,755	2,887,412	547,196,417	310,195,241	237,001,176	2,865,169,571	2,867,881,436	(2,711,865)
Motor Vehicle and Parts Dealers	19,791,942	25,226,562	(5,434,620)	130,538,064	91,095,128	39,442,936	655,999,708	373,226,955	282,772,753
Automotive Dealers	16,828,164	22,049,590	(5,221,426)	110,708,556	81,744,961	28,963,595	550,319,340	334,214,336	216,105,004
Other Motor Vehicle Dealers	1,079,716	2,477,658	(1,397,942)	7,356,464	4,972,788	2,383,676	38,508,812	12,460,297	26,048,515
Automotive Parts/Accessories, Tires	1,884,063	699,314	1,184,749	12,473,044	4,377,379	8,095,665	67,171,556	26,552,322	40,619,234
Furniture and Home Furnishings	2,041,187	322,908	1,718,279	14,732,980	2,646,273	12,086,707	71,493,699	95,911,558	(24,417,859)
Furniture	1,123,148		1,123,148	8,229,322	452,666	7,776,656	39,975,838	57,828,877	(17,853,039)
Home Furnishing	918,039	322,908	595,131	6,503,657	2,193,607	4,310,050	31,517,861	38,082,681	(6,564,820)
Electronics and Appliance	1,840,259	515	1,839,744	13,007,072	2,492,940	10,514,132	68,765,554	72,226,057	(3,460,503)
Appliances, TVs, Electronics	1,174,779		1,174,779	8,235,692	2,193,203	6,042,489	43,699,747	61,448,348	(17,748,601)
Household Appliances	211,705		211,705	1,448,454	75,499	1,372,955	7,385,622	14,417,840	(7,032,218)
Radio, Television, Electronics	963,074		963,074	6,787,238	2,117,704	4,669,534	36,314,125	47,030,508	(10,716,383)
Computer and Software	599,856	515	599,341	4,312,485	299,737	4,012,748	22,696,044	2,942,306	19,753,738
Camera and Photographic Equipment	65,624		65,624	458,895		458,895	2,369,763	7,835,403	(5,465,640)
Building Material, Garden Equip	8,510,537	970,739	7,539,798	57,924,734	24,949,113	32,975,621	275,228,013	270,795,655	4,432,358
Building Material and Supply Dealers	7,674,806	567,645	7,107,161	52,146,950	14,785,917	37,361,033	247,241,995	232,614,082	14,627,913
Home Centers	3,056,982		3,056,982	20,903,737	4,416,679	16,487,058	100,236,134	94,595,629	5,640,505
Paint and Wallpaper	120,032		120,032	839,272	41,215	798,059	4,084,189	13,627,000	(9,542,811)
Hardware	541,460	510,332	31,128	3,656,222	2,278,264	1,377,958	18,217,651	9,736,902	8,480,749
Other Building Materials Dealers	3,956,332	57,313	3,899,019	26,747,718	8,049,759	18,697,959	124,704,021	114,654,551	10,049,470
Building Materials, Lumberyards	1,349,973	19,545	1,330,428	6	2,745,059	6,508,437	42,875,954	39,098,479	3,777,475
Lawn, Garden Equipment, Supplies	835,731	403,094	432,637	5,777,783	10,163,195	(4,385,412)	27,986,018	38,181,573	(10,195,555)
Outdoor Power Equipment	131,523		131,523	878,070	1,750,836	(872,766)	4,161,105	8,937,468	(4,776,363)
Nursery and Garden Centers	704,208	403,094	301,114	4,899,713	8,412,359	(3,512,646)	23,824,913	29,244,105	(5,419,192)
Food and Beverage	9,225,619	1,832,437	7,393,182	59,445,897	36,031,866	23,414,031	323,669,747	176,217,791	147,451,956
Grocery	7,780,981	1,560,391	6,220,590	50,057,546	33,742,231	16,315,315	271,766,238	161,261,239	110,504,999
Supermarkets, Grocery (Ex Conv)	7,419,907		7,419,907	47,750,724	29,485,505	18,265,219	259,014,540	136,519,968	122,494,572
Convenience	361,074	1,560,391	(1,199,317)	2,306,823	4,256,727	(1,949,904)	12,751,698	24,741,270	(11,989,572)
Specialty Food	1,051,972	238,656	813,316	6,754,653	1,742,047	5,012,606	36,570,017	4,107,840	32,462,177
Beer, Wine and Liquor	392,667	33,390	359,277	2,633,698	547,588	2,086,110	15,333,491	10,848,713	4,484,778
Health and Personal Care	3,918,182	3,294,523	623,659	26,361,344	21,067,864	5,293,480	147,347,667	187,659,267	(40,311,600)
Pharmacies and Drug	3,168,053	3,249,675	(81,622)	21,269,048	20,379,556	889,492	119,560,855	125,001,070	(5,440,215)
Cosmetics, Beauty Supplies, Perfume	156,010	44,848	111,162	1,053,953	68,500	985,453	5,962,268	9,544,627	(3,582,359)
Optical Goods	312,232		312,232	2,148,451	103,278	2,045,173	11,114,808	23,313,650	(12,198,842)
Other Health and Personal Care	281,886		281,886	1,889,892	516,530	1,373,362	10,709,736	29,799,920	(19,090,184)

Table 6.22 (Continued): Opportunity Gap Analysis (2005) - Two, Six and 12-Mile Radii

	Two-Mile Radius			Six-Mile Radius			12-Mile Radius		
	Consumer			Consumer			Consumer		
	Expenditures	Retail Sales	Gap/Surplus	Expenditures	Retail Sales	Gap/Surplus	Expenditures	Retail Sales	Gap/Surplus
Gasoline Stations-	7,512,768	23,233,949	(15,721,181)	47,695,378	45,747,896	1,947,482	255,711,509	121,991,225	133,720,284
Gasoline Stations With Conv	4,751,807	3,994,657	757,150	30,134,766	18,274,975	11,859,791	162,310,424	78,325,258	83,985,166
Other Gasoline Stations	2,760,961	19,239,292	(16,478,331)	17,560,611	27,472,921	(9,912,310)	93,401,084	43,665,968	49,735,116
Clothing and Clothing Accessories	3,583,242	19,277	3,563,965	25,148,807	441,423	24,707,384	134,818,741	100,393,916	34,424,825
Clothing	2,596,423	19,277	2,577,146	17,991,973	414,038	17,577,935	97,088,480	69,107,424	27,981,056
Men's Clothing	275,686		275,686	1,921,237		1,921,237	10,544,248	3,873,314	6,670,934
Women's Clothing	773,066		753,789	5,388,388	324,999	5,063,389	29,190,752	24,893,251	4,297,501
Childrens, Infants Clothing	127,960		127,960	831,685	8,907	822,778	4,243,982	4,432,912	(188,930)
Family Clothing	1,164,197		1,164,197	805,350	78,682	7,974,668	43,407,561	27,191,675	16,215,886
Clothing Accessories	59,195		59,195	435,325		435,325	2,313,796	1,308,507	1,005,289
Other Clothing	196,320		196,320	1,361,987	1,451	1,360,536	7,388,142	7,407,766	(19,624)
Shoe	519,158		519,158	3,500,003		3,500,003	18,725,113	19,142,255	(417,142)
Jewelry, Luggage, Leather Goods	467,661		467,661	3,656,832	27,385	3,629,447	19,005,147	12,144,237	6,860,910
Jewelry	429,529		429,529	3,366,849	27,385	3,339,464	17,598,816	11,952,236	5,646,580
Luggage and Leather Goods	38,132		38,132	289,983		289,983	1,406,331	192,001	1,214,330
Sporting Goods, Hobby, Book, Music	1,569,940	17,989	1,551,951	10,902,563	5,410,688	5,491,875	63,057,609	113,177,850	(50,120,241)
Sporting Goods, Hobby, Musical Inst	1,085,434	17,989	1,067,445	7,536,113	4,863,825	2,672,288	39,572,416	81,299,174	(41,726,758)
Sporting Goods	524,212	17,989	506,223	3,682,521	4,619,945	(937,424)	19,741,798	53,872,428	(34,130,630)
Hobby, Toys and Games	374,000		374,000	2,547,113	164,898	2,382,215	12,862,962	19,205,375	(6,342,413)
Sew/Needlework/Piece Goods	99,942		99,942	691,670	26,140	665,530	3,472,792	4,297,996	(825,204)
Musical Instrument and Supplies	87,280		87,280	614,808	52,843	561,965	3,494,864	3,923,374	(428,510)
Book, Periodical and Music	484,506		484,506	3,366,449	546,863	2,819,586	23,485,193	31,878,676	(8,393,483)
Book and News Dealers	309,502		309,502	2,187,552	546,863	1,640,689	16,199,600	23,724,676	(7,525,076)
Book	285,961		285,961	2,028,895	546,863	1,482,032	15,276,841	22,657,675	(7,380,834)
News Dealers and Newsstands	23,541		23,541	158,658		158,658	922,759	1,067,001	(144,242)
Prerecorded Tapes, CDs, Record	175,004		175,004	1,178,897		1,178,897	7,285,593	8,154,000	(868,407)
General Merchandise	9,917,006		9,917,006	67,438,436	3,456,558	63,981,878	358,959,019	853,985,447	(495,026,428)
Department Excl Leased Depts	6,710,872		6,710,872	46,014,940	3,456,558	42,558,382	244,430,415	598,003,656	(353,573,241)
Other General Merchandise	3,206,135		3,206,135	21,423,496		21,423,496	114,528,604	255,981,791	(141,453,187)
Warehouse Clubs and Super	2,035,458		2,035,458	13,413,795		13,413,795	72,447,624	202,758,909	(130,311,285)
All Other General Merchandise	1,170,676		1,170,676	8,009,702		8,009,702	42,080,980	53,222,883	(11,141,903)
Miscellaneous Store Retailers	2,169,947	492,902	1,677,045	14,693,412	5,378,381	9,315,031	76,222,563	105,405,936	(29,183,373)
Florists	259,330	267,596	(8,266)	1,796,676	2,063,310	(266,634)	8,976,910	11,234,980	(2,258,070)
Office Supplies, Stationery, Gift	915,178	65,540	849,638	6,267,599	2,375,806	3,891,793	32,892,342	45,539,784	(12,647,442)
Office Supplies and Stationery	397,043		397,043	2,728,019	265,344	2,462,675	14,222,102	8,946,184	5,275,918
Gift, Novelty and Souvenir	518,135	65,540	452,595	3,539,580	2,110,462	1,429,118	18,670,241	36,593,600	(17,923,359)
Used Merchandise	213,826	126,085	87,741	1,485,879	499,451	986,428	8,017,413	6,960,102	1,057,311
Other Miscellaneous Store Retailers	781,613	33,680	747,933	5,143,258	439,815	4,703,443	26,335,897	41,671,069	(15,335,172)

Table 6.22 (Continued): Opportunity Gap Analysis (2005) - Two, Six and 12-Mile Radii

	Two-Mile Radius			Six-Mile Radius			12-Mile Radius		
	Consumer Expenditures	Retail Sales	Gap/Surplus	Consumer Expenditures	Retail Sales	Gap/Surplus	Consumer Expenditures	Retail Sales	Gap/Surplus
Non-Store Retailers-	4,909,800	19,968,839	(15,059,039)	33,347,866	39,601,994	(6,254,128)	176,788,151	81,547,127	95,241,024
Electronic Shopping, Mail-Order Houses	2,701,013	152,099	2,548,914	18,851,494	537,381	18,314,113	102,123,417	13,215,288	88,908,129
Vending Machine Operators	367,243	10,522,365	(10,155,122)	2,367,515	16,154,391	(13,786,876)	12,909,339	24,910,569	(12,001,230)
Direct Selling Establishments	1,841,544	9,294,374	(7,452,830)	12,128,858	22,910,222	(10,781,364)	61,755,395	43,421,271	18,334,124
Foodservice and Drinking Places	6,833,737	3,556,116	3,277,621	45,959,866	31,875,117	14,084,749	257,107,592	315,342,653	(58,235,061)
Full-Service Restaurants	2,806,306	2,372,836	433,470	18,888,886	10,388,754	8,500,132	105,747,200	141,335,390	(35,588,190)
Limited-Service Eating Places	2,977,899	862,928	2,114,971	19,907,905	9,838,938	10,068,967	111,094,265	132,670,124	(21,575,859)
Special Foodservices	532,626	320,352	212,274	3,566,360	1,738,881	1,827,479	19,846,619	14,152,970	5,693,649
Drinking Places -Alcoholic Beverages	516,906		516,906	3,596,715	9,908,544	(6,311,829)	20,419,507	27,184,168	(6,764,661)

Source: Claritas, Inc., 2006

Table 6.23: Hotels in Kalamazoo-Battle Creek Area

Name of Establishment	Location	Opened	Rooms
Country Inn & Suites Kalamazoo	Kalamazoo	1960	79
Comfort Inn Battle Creek	Battle Creek	1963	99
Ramada Inn & Suites Battle Creek	Battle Creek	1965	133
Best Western Albion Inn	Albion	1967	60
Days Inn Kalamazoo Airport	Kalamazoo	1967	146
Quality Inn & Suites Battle Creek	Battle Creek	1968	90
Knights Inn Kalamazoo	Kalamazoo	1969	54
Econo Lodge Battle Creek	Battle Creek	1970	54
Red Roof Inn Kalamazoo East	Kalamazoo	1973	79
Holiday Inn Kalamazoo West	Kalamazoo	1974	186
Motel 6 Battle Creek	Battle Creek	1974	77
Radisson Plaza Hotel @ Kalamazoo	Kalamazoo	1975	341
Red Roof Inn Kalamazoo West University	Kalamazoo	1976	108
Clarion Hotel Kalamazoo	Kalamazoo	1978	156
McCamly Plaza Hotel	Battle Creek	1981	244
Econo Lodge Kalamazoo	Kalamazoo	1982	60
Knights Inn Battle Creek	Battle Creek	1983	94
Super 8 Battle Creek	Battle Creek	1985	59
Super 8 Kalamazoo	Kalamazoo	1985	62
Travelodge Coldwater	Coldwater	1985	90
Days Inn Battle Creek	Battle Creek	1988	86
Econo Lodge Coldwater	Coldwater	1988	46
Fairfield Inn Kalamazoo East	Kalamazoo	1988	118
Motel 6 Kalamazoo	Kalamazoo	1988	104
Airport Inn	Kalamazoo	1989	50
Best Western Hospitality Inn	Kalamazoo	1989	124
Lees Inn Of America & Suites Kalamazoo	Kalamazoo	1989	71
Residence Inn Kalamazoo	Kalamazoo	1989	83

Table 6.23 (Continued): Hotels in Kalamazoo-Battle Creek Area

Name of Establishment	Location	Opened	Rooms
Baymont Inns & Suites Kalamazoo	Kalamazoo	1991	87
Super 8 Coldwater	Coldwater	1991	58
Arbor Inn	Marshall	1992	49
Yarrow Country Inn	Augusta	1992	45
Baymont Inns & Suites Battle Creek	Battle Creek	1994	88
Hampton Inn Battle Creek	Battle Creek	1995	64
Hampton Inn Kalamazoo	Kalamazoo	1995	64
Amerihost Marshall #145	Marshall	1997	61
Comfort Inn Kalamazoo	Kalamazoo	1998	52
Fairfield Inn Kalamazoo West	Kalamazoo	1998	62
Holiday Inn Express Hotel Coldwater	Coldwater	1998	80
Amerihost Battle Creek	Battle Creek	1999	62
Fairfield Inn Battle Creek	Battle Creek	1999	74
Brook Lodge Hotel & Conf Ctr	Augusta	2000	47
Hawthorn Suites Ltd Kalamazoo	Kalamazoo	2000	64
Holiday Inn Express Hotel & Suites Kalamazoo	Kalamazoo	2000	64
Holiday Inn Express Hotel Marshall	Marshall	2000	66
Red Roof Inn Coldwater	Coldwater	2000	65
Hampton Inn Suites Kalamazoo Oshtemo	Kalamazoo	2003	78
Hampton Inn Marshall	Marshall	2004	73
Best Western Executive Inn	Battle Creek	2005	60
Comfort Inn Kalamazoo	Kalamazoo	2006	50
Holiday Inn Battle Creek	Battle Creek	2006	151
Staybridge Suites Kalamazoo	Kalamazoo	2006	95
Quality Inn & Suites	Paw Paw	NA	49
Super 8 Paw Paw	Paw Paw	NA	51
Total Rooms			4,661

Source: *Smith travel Data and Goodman Williams Group, 2006*

Table 6.24: Key Hotel Market Measures -- Kalamazoo Market

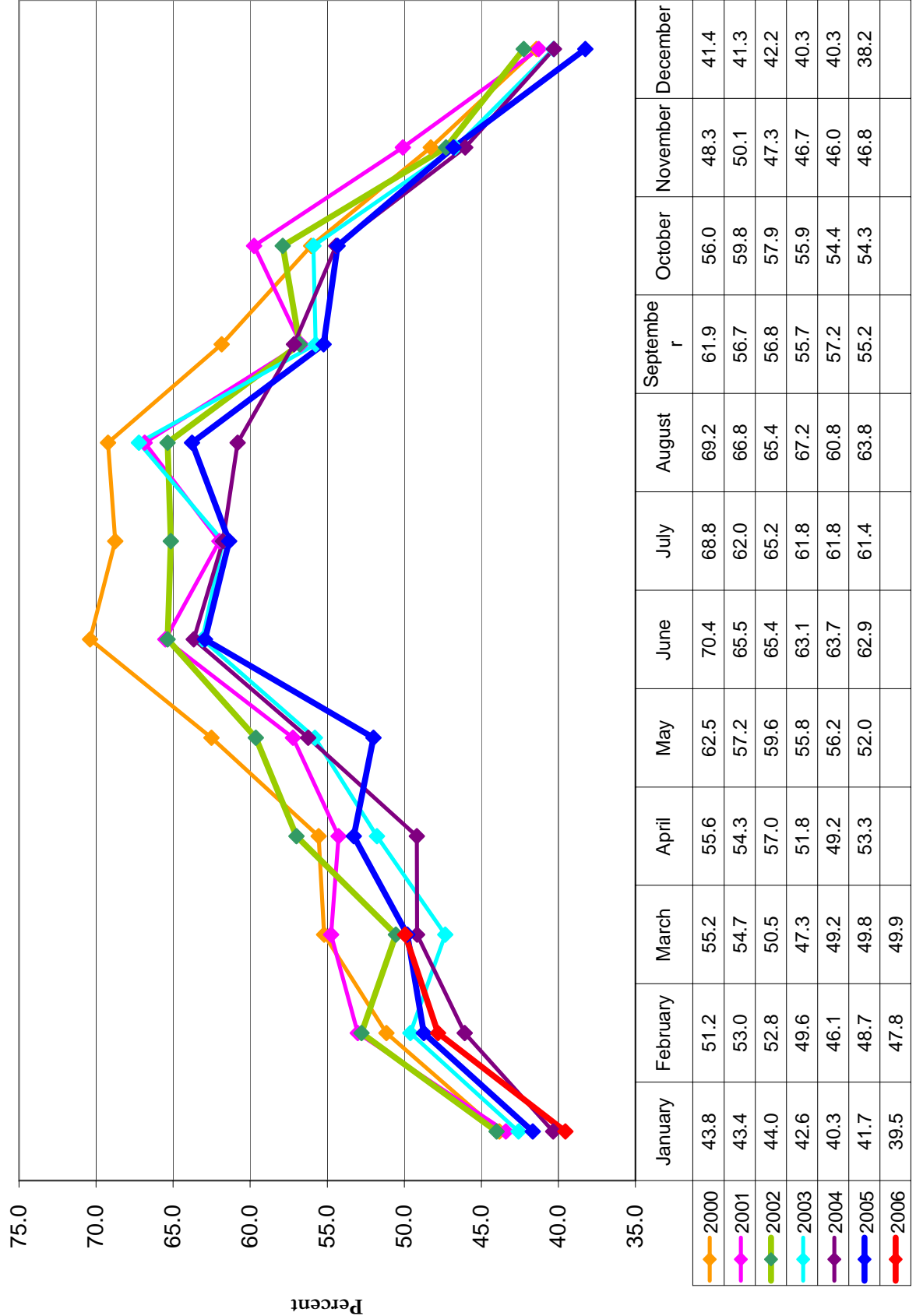
Year	ADR	RevPAR	Revenue	Supply	Demand	Occupancy Rate
2000	\$61.71	\$35.22	\$57,583,938	1,635,011	933,196	57.1%
2001	\$62.88	\$34.84	\$58,936,285	1,691,425	937,225	55.4%
2002	\$62.56	\$34.63	\$58,202,429	1,680,825	930,274	55.3%
2003	\$63.52	\$33.78	\$57,344,433	1,697,563	902,810	53.2%
2004	\$66.31	\$34.58	\$59,210,342	1,712,387	892,883	52.1%
2005	\$68.08	\$35.63	\$60,133,978	1,687,911	883,275	52.3%
2006*	\$70.53	\$32.23	\$13,321,325	413,280	188,863	45.7%

* March YTD

Notes: **ADR** - Average Daily Rate
RevPAR - Revenue Per Available Room
Revenue - Total Room Revenue
Supply - Rooms Available
Demand - Rooms Sold

Source: Smith Travel Research, 2006

Table 6.25: Historic Occupancy Trends for Kalamazoo-Battle Creek Area Hotels



Source: Smith Travel Research, 2006

