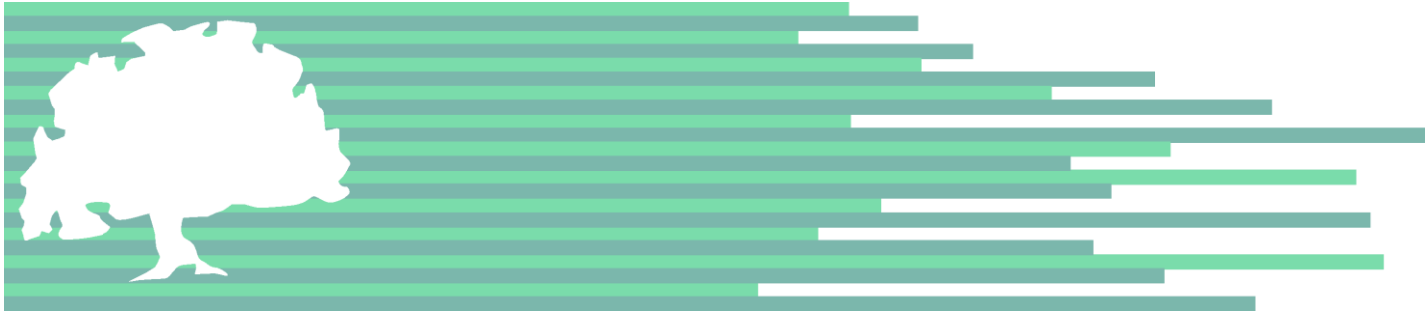


Shelby Township Market Assessment Summary



INTRODUCTION

The following is a synopsis of the market assessment findings and conclusions prepared as input into Shelby Township's plan update. The assessment identifies existing conditions, contains analyses appropriate to describe marketable opportunities, defines opportunities that would be sustainable, and, finally, provides guidance for land use planning to seize these opportunities. The market assessment is based on data and information gathered through the following:

- ◇ A review of secondary information, Independent research, proprietary computer modeling.
- ◇ Interviews with stakeholders.
- ◇ A survey of patrons conducted during peak visitor season.
- ◇ A survey of residents of the Shelby Township area.
- ◇ A survey of area businesses.

The assessment summary includes salient information on national and local factors that impact the future, property trends, demographics, current and future housing, the current and future economy as well as related opportunities associated with each.

NATIONAL & LOCAL FACTORS IMPACTING ECONOMIC DEVELOPMENT

There are demographic and other changes within the United States and Michigan that impact the opportunities and the future for Shelby Township. These include but are not limited to:

- ◇ Birth, fertility and marriage rates have fallen to the lowest level in the history of the country.
- ◇ The average age of residents continues to increase.
- ◇ The two fastest growing components of the population, both the Baby Boomers households and younger adult households are increasingly seeking and participating in passive and other recreational activity and new forms of entertainment.
- ◇ The young adult population relocates and shifts employment at a faster pace than any previous generation.
- ◇ Growing household income differentials will further market segmentation.
- ◇ The school district associated with Shelby Township has maintained an excellent reputation.

The demographic changes impact retail spending, housing needs, and other segments of the economy.

Changes in manufacturing and technology within the United States and Michigan will impact industrial, employment and commercial opportunities. They include but are not limited to those that follow.

- ◇ Manufacturing is changing significantly through changing technology and technological applications.
- ◇ Internet sales will continue to grow as new high speed internet options become available and prevalent.
- ◇ Additive manufacturing will diminish the need for inventory storage on-site at retail operations.
- ◇ On demand production will change the basic retail fabric.

The following are essential local factors impacting Shelby Township.

- ◇ More than 80% of all businesses responding to the survey conducted as part of this analysis process indicated that the Shelby location has met or exceeded their expectations.
- ◇ 80% of the businesses say revenues have been the same or up over the last few years. 50% of the businesses identified revenues as having increased.

- ◇ About one-fifth of all operations defined a need to expand in the next couple of years with only one-third of those needing to expand say they can make the expansion at their current location.
- ◇ One half of the businesses stated that their ability to do business in Shelby Township has improved or greatly improved in the last five to ten years.
- ◇ More than half of all employees of Shelby operations live within Shelby or in areas immediately surrounding Shelby.
- ◇ Seven out of ten operations have reduced their labor force in the past few years as a result of technological change. About two in ten operations have reduced employee benefits.
- ◇ The primary types of investment the business community would like to see made by government are in the areas of transportation infrastructure, public transportation and communications infrastructure.

PROPERTY TRENDS

Available data indicates that property values are increasing for both residential and non-residential activity in Shelby.

- ◇ Since the peak of the Great Recession the number of residential sales in Shelby Township has increased by about 25%. The average sales price per square foot has increased from roughly \$90 to more than \$110 through the first five months of 2015.
- ◇ Manufacturing vacancy rates have declined and new space continues to be added to the inventory at significant pace. Much of the space has been leasing to quality tenants.
- ◇ The linkage to Utica auto activity has further solidified as well. It has been reported that some non-preleased industrial space is being constructed in the general area for the first time in many years.

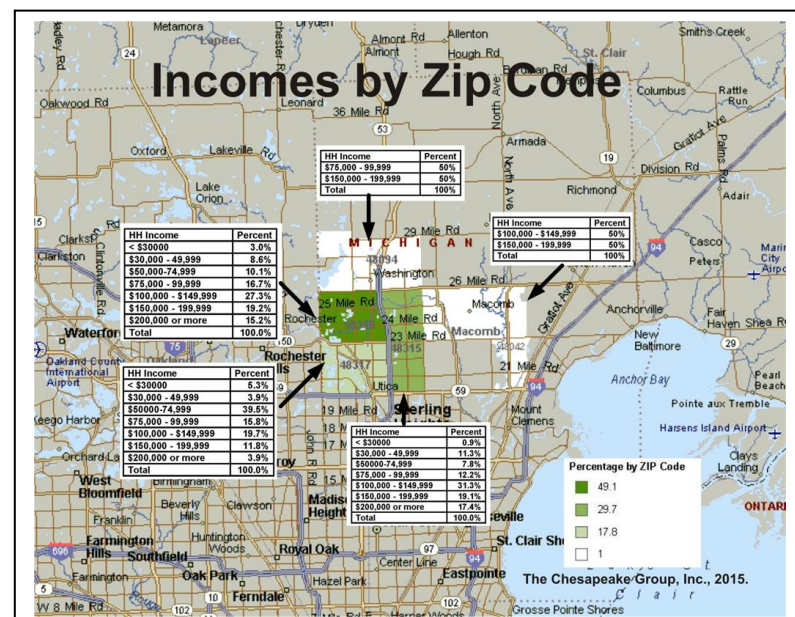
DEMOGRAPHICS

According to the 2010 Census, Shelby Township consisted of a population of about 73,800 living in roughly 9,700 households.

There are three zip codes associated with Shelby Township. These are 48315, 48316 and 48317. The population in the three zip codes exceeds Shelby Township's population by less than 5,000 and less than 2,200 households.

A survey of the residents of the Township and contiguous areas was conducted as part of the market assessment with more than 600 households responding. The results indicate that:

- ◇ There is an average of 3.22 people per household.
- ◇ 75% of households have no children pre-school age.
- ◇ Average age of primary income earner is just under 50 years of age.
- ◇ 86% of the households have at least one member employed full-time.
- ◇ The average total annual household income is roughly \$119,850; roughly 60% of all households have total annual incomes above \$100,000. Housing income distribution fifers for the primary zip code areas associated with Shleby and contiguous areas.



- ◇ Roughly 25% of the households have lived in their current house for less than five years. Another 25% of the total households purchased during a period in time where the property is likely to sell for less at present than the price paid.
- ◇ Excluding households that have no mortgage or rent payments as a result of factors such as tenure or inheritance, the average monthly mortgage or rent payment is \$1,312.
- ◇ As much as one-half of all current Township residents are likely to move in the next five years due to many factors.
- ◇ About nine out of every ten households owns or leases at least two personal vehicles
- ◇ 69% of households have no one employed in Shelby Township; 42% of the households have someone employed in Oakland County.
- ◇ Only 3% of those who do work in Shelby bike or walk.
- ◇ Average weekly spending per household on groceries is \$144. At least 60% of all food purchases made at service establishments such as restaurants are made outside of Shelby Township.

Shelby Township's population is relatively affluent when compared to most other areas of the region. However, its current population is aging which impacts the potential school district, infrastructure and service needs, as well future economic and housing conditions and demand. While there is a desire to "age in place," many desire community qualities (walkability) and housing types (smaller units) that are difficult to find in Shelby at this time.

CURRENT & FUTURE HOUSING

Shelby has grown in the past and continues to see substantial housing unit growth in the present. SEMCOG data shows the Township's population growing by 4,673 or 6.3% between 2010 and 2014 and by 8,544 or 11.6% between 2010 and 2040 as vacant land diminishes.

Based on historical permit patterns and the survey findings, roughly 1,100 new housing units would be marketable in Shelby Township between 2016 and 2020. It is noted that there is a high probability that new units could be absorbed by the local population within the Township.

The following provides a breakdown of the general size of unit and the income range of the market by age cluster.

1. **55 years of age and older active adults** - smaller units than typical of Shelby at the present time, many of which would be single-family units with small or zero lots; potentially 25% of the market would be non-single-family units. Household incomes between \$75,000 and \$150,000. Walkability is the key to capturing the market segment.
2. **45 to 54 years of age cluster, empty and approaching empty nesters** - 50% of all units as described above with other units of similar scale to that found in Shelby at present. Income levels of the market segment higher than those 55 or older, ranging from \$100,000 to \$200,000. Walkability is a key to capturing the market segment.
3. **35 to 44 years of age cluster** - 85% of all units would be at the same scale or larger than the current units in Shelby Township. The income range is identical to that in the 45 to 54 category.

An increasing share of the Township's residents and larger market want a different housing pattern in the future. It is estimated that 50% to 60% of the new units would be oriented toward capturing active adults. It is noted that creating the desired active adult housing would facilitate the purchase of existing homes by young families and help maintain the quality of the school system. With relatively high incomes for the potential segments of

the market that could be captured or held in Shelby Township, the new smaller units, both rental and ownership, would be up scale, market rate housing.

CURRENT & FUTURE OVERALL ECONOMY

Cluster analyses were performed to identify economic gaps which could be served by Shelby Township. The analysis was performed at both the zip code and county levels. In addition, an analysis of evolving Research & Development activity was also performed to identify opportunities. The general conclusions associated with these analyses follow.

Manufacturing

- Pharmaceutical Preparation Manufacturing
- Ornamental and Architectural Metal Work Manufacturing
- Upholstered Household Furniture Manufacturing
- Custom Architectural Woodwork and Millwork Manufacturing
- Surgical Appliance and Supplies Manufacturing
- Dental Equipment and Supplies Manufacturing

Medical and R & D Clusters

- Offices of Physicians, Mental Health Specialists
- Offices of Optometrists
- Offices of Mental Health Practitioners (except Physicians)
- Kidney Dialysis Centers
- Freestanding Ambulatory Surgical and Emergency Centers
- Diagnostic Imaging Centers
- General Medical and Surgical Hospitals
- Nursing Care Facilities (Skilled Nursing Facilities)
- Medical Laboratories

Education Cluster

- Junior Colleges
- Colleges, Universities, and Professional Schools
- Computer Training
- Professional and Management Development Training
- Fine Arts Schools
- Language Schools
- Exam Preparation and Tutoring

Arts, Culture and Entertainment Cluster

- Theater Companies and Dinner Theaters
- Musical Groups and Artists
- Promoters of Performing Arts, Sports, and Similar Events with Facilities
- Independent Artists, Writers, and Performers

F.I.R.E.

- Consumer Lending

Investment Banking and Securities Dealing
Securities Brokerage
Portfolio Management
Investment Advice
Trust, Fiduciary, and Custody Activities
Direct Life Insurance Carriers
Direct Health and Medical Insurance Carriers
Direct Title Insurance Carriers

R & D Technologies

Haptic Kickback Accelerators
Road Condition Estimation Systems (Auti sensors, wheel speed sensors, rain sensors, etc.)
Electronic Guardrail
Enhanced Touch Screens
Aluminum Turbo Housing
4D printing
Gear Generators
Micro-Electro-Mechanics (MEMS) devices
Light-Based Technologies
Augmented reality (AR)

R & D Applications

Carbon fiber (wheels)
Triboelectric Nanogenerators
Growing carbon nanotubes with metallia conductivity
Photonics technologies for auto industry
three-dimensional, 3-D/Additive Manufacturing, AM, advanced decision models
Gear Generators
Advanced industrial robots
Unmanned remote-controlled aerial vehicles (drones)

Based on the anticipated increase in households and population, household labor force participation rates, and stability of household incomes, a total of 941,000 square feet of non-retail goods and related services space could be supported in Shelby to accommodate the needs of the growing households. Adding such space would diminish commuting, related transportation and other related issues for area residents. The following table provides a breakdown of that space.

Type of Space	Growth in Square Feet 2016 to 2025
Manufacturing	425,000
Traditional Office Space	243,000
Emerging Industrial/Office Space	273,000
Total of the Three	941,000

Excluded from the above would be certain medical activity and related space including those associated with a hospital.

COMMERCIAL DEMAND & ENTERTAINMENT SPENDING

Potential demand for additional retail goods and related services space was also analyzed. The forecasting of retail goods and related services space concluded:

- ◇ Residents of Shelby Township and the immediate areas around the Township associated with the three primary zip codes generates about \$1.8 billion in retail goods and related services sales in 2015. These sales are sufficient to support roughly 5.5 million square feet of space. The sales and supportable space are associated with many locations both within and outside of the Township, surrounding areas, County, region and beyond.
- ◇ Most of the dollars are spent in areas outside of the Township. An opportunity exists to recapture some of the exported dollars from residents that are spent in other communities including Utica, Rochester and Partridge Creek.
- ◇ As households increase new demand for goods and services is created. By 2020, the community can support about 206,000 additional square feet of retail goods space at any and all locations. Capturing the newly generated demand would provide the opportunity for a modest amount of infill or filling of vacancies.
- ◇ Additional opportunity is particularly strong for food service activity often blended with entertainment. The success of retail will be based on attracting Charlevoix County and surrounding counties' households off season.
- ◇ The average Shelby Township households spends roughly \$4,300 annually on entertainment. Total entertainment dollars spent by Shelby residents at any and all locations is estimated at \$45.2 million in 2015. The dollars spent is expected to grow by \$4.7 million by 2020. More than 90% of all entertainment dollars spent by residents go to entities located outside of Shelby Township at present. While unlikely to capture the majority of the dollars exported, doubling or tripling local spending represents a reasonable objective.
- ◇

APPENDIX

Time Period	# Sales	Total Square Feet	\$/Square Foot
2008-09	236	526,188	\$95.76
2009-10	367	753,199	\$89.33
2010-11	471	1,037,477	\$88.07
2011-12	473	963,267	\$90.52
10/1/14 to 5/18/15	446	881,178	\$110.64

Area	2010 Population	2010 Households
48316	25,404	9,701
48317	26,610	10,826
48315	26,563	10,000
Total of 3 Zip Codes	78,577	30,527
Shelby Township	73,804	28,299
Macomb County	840,978	331,667

Survey respondent zip codes

Zip Code Area	Percent
48316	49.1%
48315	29.7%
48317	17.8%
Other	3.4%

48094	47315	48325
48042	48041	48326
48044	48318	49317

Number of people in household employed full-time*

Number Employed Full-time	Percent
0	13.5%
1	46.9%
2	34.4%
3	4.5%
4 or more	0.6%

Income Category	Percent
Less than \$10,000	0.2%
\$10,000 to \$14,999	0.2%
\$15,000 to \$19,999	0.7%
\$20,000 to \$29,999	0.8%
\$30,000 to \$49,999	8.7%

\$50,000 to \$74,999	14.8%
\$75,000 to \$99,999	15.9%
\$100,000 to \$149,999	27.6%
\$150,000 to \$199,999	17.7%
\$200,00 or more	13.3%

TRANSPORTATION

Number of personal vehicles owned or leased

Number	Percent
0	0.2%
1	11.1%
2	55.6%
3	22.2%
4 or more	10.9%

County Employed

County	Percent
Oakland	42.0%
Wayne	8.0%
Others	36.3%

Number in households that bike or walk for all purposes (fitness, rec., work, etc.)

Answer Options	Percent
0	16.0%
1	14.9%
2	27.3%
3	11.5%
4 or more	30.3%

Tenure @ Current Address	Percent
2 years or less	12.2%
3 to 4 years	14.7%
5 to 9 years	17.8%
10 to 19 years	33.3%
20 or more years	22.0%

Average monthly mortgage or rent payment, including those without payments = \$1,042

Current Monthly Rent/Mortgage Payment	Percent
None	20.6%
Less than \$400/month	1.2%
\$400 to \$599/month	3.9%
\$600 to \$799/month	9.5%
\$800 to \$999/month	10.4%
\$1,000 to \$1,249/month	17.1%
\$1,250 to \$1,499/month	11.8%

\$1,500 to \$1,749/month	10.6%
\$1,750 to \$1,999/month	7.2%
\$2,000 to \$2,499/month	4.6%
\$2,500 to \$2,999/month	2.3%
\$3,000 or more/month	0.9%

Housing development activity over time

	2005	2006	2007	2008	2009
Unit Type	Units	Units	Units	Units	Units
Single Family	716	368	233	71	52
Three and Four Family	0	0	0	0	0
Five or More Family	25	40	30	20	0
All	741	412	263	91	52
	2010	2011	2012	2013	2014
Unit Type	Units	Units	Units	Units	Units
Single Family	137	157	166	256	146
Three and Four Family	0	4	16	0	0
Five or More Family	24	96	105	60	161
All	161	257	287	316	307

Almost 1/2 of all residents might move in next five years for many reasons.

Likely to Move in Next 5 Years	Percent
Yes	25.7%
No	51.7%
Maybe	22.6%

3

Desired characteristics of next home or area in which they will live.

Desired Characteristic of Next Area/Home	Percent
ownership unit only	40.1%
maybe owner or rental unit	7.4%
condominium	22.8%
single-family unit	62.3%
smaller than current unit	20.6%
larger than current unit	20.2%
about same size as current unit	30.0%
a walkable environment for recreation, shopping and other activity	55.3%
quality schools	37.1%
safe area or development	59.0%
independent adult living	7.2%
active adult community with recreational amenities such as golf, clubhouse, pool, etc.	19.7%
two bedrooms	15.6%
more than two bedrooms	55.9%
master bedroom on first floor	38.8%

Average weekly spending per household on groceries = \$144

Amount Spent	Percent
--------------	---------

Less than \$35	1.2%
\$35 to \$44.99	1.2%
\$45 to \$59.99	3.6%
\$60 to \$74.99	7.3%
\$75 to \$99.99	14.6%
\$100 to \$124.99	23.7%
\$125 to \$149.99	19.4%
\$150 to \$199.99	13.5%
\$200 to \$249.99	10.1%
\$250 or More	5.3%

Grocery operation most often frequented

Grocery Operation	Percent
Kroger	39.2%
Meijer	31.0%
Vince and Joe's	9.8%
Walmart	6.4%
Costco	2.4%
Whole Foods	2.2%
Hollywood Market	2.0%

Randazzo
 Trader Joe's
 Aldi
 Other

Papa Joe's Gourmet Market
 Nitsches
 Sam's Club

Location frequented when eating dinner out

Area	Percentage
Shelby Township	41.6%
Other	18.5%
Rochester	8.9%
Sterling Heights	8.7%
Washington Township	7.9%
Utica	5.6%
Charter Township of Clinton	2.1%
Macomb Township	2.1%
Rochester Hills	1.9%
Romeo	1.2%
Troy	0.8%
Detroit	0.6%

Establishments frequented for dinner

Establishment	Percent
Other	32.8%
Da Francesco's	5.2%

Chili's	4.6%
Jet's pizza	3.1%
Bad Brads BBQ	2.7%
Kruse & Muer	2.5%
Taco Loco	2.5%
Steiny's	2.3%
Stone Creek Roadhouse	2.3%
Art & Jakes	2.1%
Benny's	2.1%
Nick's 22nd Street Steakhouse	2.1%
Texas Roadhouse	2.1%
Leo's Coney Island	1.7%
Nick's Country Oven	1.7%
Shelby Pub and Grill	1.7%
Buddy's	1.5%
Marcus Grill	1.5%
Olive garden	1.5%
Applebee's	1.2%
Buffalo Wild Wings	1.2%
Kerby's Koney Island	1.2%
Mr. B's	1.2%
Red Robin	1.2%
Hamlin Pub	1.0%
Mexican Village	1.0%
Miguel's Cantina	1.0%
National Coney Island	1.0%

Chipotle
 Firehouse
 Hong Kong Cafe
 Taco Bell
 Uno's
 Arby's
 Brown Iron
 Carrabba's
 China Chef
 Di Fratelli
 Gus O'Connor's

La Saj Lebonese Bistro
 Lebanese grill
 Noodles and Company
 Ocean Breeze
 Outback Steakhouse
 Shamrock Pub
 Sips Gastropub
 Subway
 TGI Fridays
 The Clean Plate

Location frequented when eating lunch out

Area	Percent
Shelby Township	37.8%
Other	21.2%

Rochester	6.6%
Washington Township	5.8%
Utica	5.3%
Sterling Heights	4.3%
Troy	4.1%
Rochester Hills	3.0%
Macomb Township	2.3%
Warren	2.3%
Auburn Hills	2.1%
Detroit	1.3%
Charter Township of Clinton	1.1%
Van Dyke	0.9%
Partridge creek	0.8%
Madison Heights	0.6%
Southfield	0.6%

Lunch venues frequented

Establishment	Percent
Other	30.5%
McDonald's	7.9%
Panera Bread	6.8%
Subway	5.8%
Jimmy John's	5.1%
Leo's Coney Island	4.3%
Chipotle	3.4%
National Coney Island	2.4%
Taco bell	2.4%
Jersey Mike's	2.3%
Marcus grill	2.1%
Burger King	1.9%
Varies	1.7%
Nick's Country Oven	1.3%
Wendy's	1.3%
Arby's	1.1%
Chili's	1.1%
Kerby's Koney Island	1.1%
Qdoba	1.1%

Art & Jakes
 Buffalo Wild Wings
 Bad Brads BBQ
 Coney island
 Ken's Cozy Cafe
 Mexican Village

New York Deli
 Savory Grill
 Taco Loco
 Benny's
 Big Al's Firehouse
 Bravo!

Da Francesco's
 Firehouse Subs
 Hamlin Pub
 Kruse & Muer
 Kwong Tung Chop Suey
 Mr. Bs
 Pancake Factory

Pei Wei
 Piada
 Potbelly
 Shamrock Bar & Grill
 Steiny's
 Tubby's

Apparel Purchases

Operation	Percent
Kohl's	32.7%
Other	8.2%
Macy's	7.7%
Target	6.8%
JC Penney	6.1%
Nordstrom	3.9%
Walmart	3.0%
Carson's	2.8%
Old Navy	2.8%
Marshalls	2.3%
Meijer	2.3%
Salvation Army	2.1%

Online
 Express
 Gap
 Kmart
 The Limited
 Banana Republic
 Dressbarn
 Loft
 Varies
 Talbots
 TJ Maxx

White House Black
 Lord and Taylor
 New York & Company
 Ann Taylor
 Costco
 H&M
 J Jill
 Lane Bryant
 Sears
 Thrift Store
 Torrid

Demand Clusters

55+ Age Cluster

Size of Next Unit	Percent
larger	5.4%
same	18.9%
smaller	66.2%
uncertain	9.5%
total	100.0%

Income level of those in 55+ age cluster likely to move

Household Income Range	Percent
\$20,000 to \$29,999	2.8%
\$30,000 to \$49,999	11.1%
\$50,000 to \$74,999	8.3%
\$75,000 to \$99,999	27.8%

\$100,000 to \$149,999	30.6%
\$150,000 to \$199,999	8.3%
\$200,00 or more	11.1%
Total	100.0%

45 to 54 Age Cluster

Size of Next Unit	Percent
Larger	13.6%
Same	32.2%
Smaller	54.2%
Total	100.0%

4

Household Income Range	Percent
\$30,000 to \$49,999	6.7%
\$50,000 to \$74,999	15.6%
\$75,000 to \$99,999	11.1%
\$100,000 to \$149,999	26.7%
\$150,000 to \$199,999	24.4%
\$200,000 or more	15.6%
Total	100.0%

35 to 44 Age Cluster

Size of Next Unit	Percent
Larger	42.2%
Same	42.2%
Smaller	15.6%
Total	100.0%

Household Income Range	Percent
\$15,000 to \$19,999	1.6%
\$20,000 to \$29,999	1.6%
\$30,000 to \$49,999	8.2%
\$50,000 to \$74,999	18.0%
\$75,000 to \$99,999	16.4%
\$100,000 to \$149,999	23.0%
\$150,000 to \$199,999	24.6%
\$200,000 or more	6.6%
Total	100.0%

Zip code level under-represented

Contractors (Building equipment, flooring)

Food (Health) Supplement Stores

Offices of All Other Miscellaneous Health Practitioners

Medical Laboratories

All Other Health and Personal Care Stores

New Car Dealers

Sporting Goods Stores

Florists

Gift, Novelty, and Souvenir Stores

Motion Picture Theaters

Wireless Telecommunications Carriers

Interior Design Services

Computer Systems Design Services

Locksmiths

Colleges, Universities, and Professional Schools

Computer and Office Machine Repair and Maintenance

County level under-represented

Contracting Cluster

Commercial, Multi-family Housing and Institutional
Building Construction

Roofing Contractors

5

Manufacturing Cluster

Pharmaceutical Preparation Manufacturing
Ornamental and Architectural Metal Work Manufacturing
Upholstered Household Furniture Manufacturing
and Supplies Manufacturing

Custom Architectural Woodwork and Millwork Manufacturing
Surgical Appliance and Supplies Manufacturing
Dental Equipment

Wholesaling

Furniture Merchant Wholesalers
Home Furnishing Merchant Wholesalers
Office Equipment Merchant Wholesalers
Medical, Dental, and Hospital Equipment and Supplies
Merchant Wholesalers
Ophthalmic Goods Merchant Wholesalers
Plumbing and Heating Equipment and Supplies (Hydronics)
Merchant Wholesalers
Industrial Supplies Merchant Wholesalers

Sporting and Recreational Goods and Supplies Merchant
Wholesalers
Toy and Hobby Goods and Supplies Merchant Wholesalers
General Line Grocery Merchant Wholesalers
Wine and Distilled Alcoholic Beverage Merchant Wholesalers
Farm Supplies Merchant Wholesalers
Book, Periodical, and Newspaper Merchant Wholesalers
Paint, Varnish, and Supplies Merchant Wholesalers

F.I.R.E.

Consumer Lending
Investment Banking and Securities Dealing
Securities Brokerage
Portfolio Management
Investment Advice

Trust, Fiduciary, and Custody Activities
Direct Life Insurance Carriers
Direct Health and Medical Insurance Carriers
Direct Title Insurance Carriers

Retail/Commercial/Services Clusters

Breweries
Tire Dealers
Furniture Stores
Floor Covering Stores
Paint and Wallpaper Stores
Supermarkets and Other Grocery (except Convenience) Stores
Convenience Stores
Fish and Seafood Markets
Cosmetics, Beauty Supplies, and Perfume Stores
Men's Clothing Stores
Women's Clothing Stores
Children's and Infants' Clothing Stores
Family Clothing Stores
Clothing Accessories Stores
Shoe Stores
Luggage and Leather Goods Stores

Gift, Novelty, and Souvenir Stores
Used Merchandise Stores
General Warehousing and Storage
Refrigerated Warehousing and Storage
Software Publishers
Wireless Telecommunications Carriers
Offices of Lawyers
Title Abstract and Settlement Offices
Offices of Certified Public Accountants
Interior Design Services
Computer Systems Design Services
Human Resources Consulting Services
Child Day Care Services
Fitness and Recreational Sports Centers
Snack and Nonalcoholic Beverage Bars
Footwear and Leather Goods Repair

Nail Salons

Pet Care (except Veterinary) Services

Medical and R & D Clusters

Research and Development in Biotechnology
 Research and Development in the Physical, Engineering,
 and Life Sciences
 Offices of Physicians, Mental Health Specialists
 Offices of Optometrists
 Offices of Mental Health Practitioners (except Physicians)
 Kidney Dialysis Centers

Freestanding Ambulatory Surgical and Emergency Centers
 Diagnostic Imaging Centers
 Blood and Organ Banks
 General Medical and Surgical Hospitals
 Nursing Care Facilities (Skilled Nursing Facilities)
 Testing Laboratories

6

Education Cluster

Junior Colleges
 Colleges, Universities, and Professional Schools
 Computer Training
 Professional and Management Development Training

Fine Arts Schools
 Language Schools
 Exam Preparation and Tutoring
 Educational Support Services

Arts & Culture cluster

Theater Companies and Dinner Theaters
 Musical Groups and Artists
 Promoters of Performing Arts, Sports, and Similar Events with Facilities

Independent Artists, Writers, and Performers
 Museums
 Zoos and Botanical Gardens

RESEARCH & DEVELOPMENT

Technologies

Haptic Kickback Accelerators
 Road Condition Estimation Systems (Auti sensors, wheel
 speed sensors, rain sensors, etc.)
 Electronic Guardrail
 Enhanced Touch Screens
 Aluminum Turbo Housing

4D printing
 Gear Generators
 Micro-Electro-Mechanics (MEMS) devices
 Light-Based Technologies
 Augmented reality (AR)

Applications

Carbon fiber (wheels)
 Triboelectric Nanogenerators
 Growing carbon nanotubes with metalla conductivity
 Photonics technologies for auto industry

three-dimensional, 3-D/Additive Manufacturing, AM, advanced
 decision models
 Gear Generators
 Advanced industrial robots
 Unmanned remote-controlled aerial vehicles (drones)

Current & Five Year Demand Forecast

Category	2015 Sales	2020 Sales	2015 Sq. Ft.	2020 Sq. Ft.	Change 2015-20 Sq. Ft.
Food	\$171,742,000	\$178,185,000	273,194	283,443	10,249
Eat/Drink	200,878,000	208,414,000	478,281	496,224	17,943
General Merchandise	132,109,000	137,065,000	784,104	813,517	29,415
Furniture	65,150,000	67,594,000	149,951	155,577	5,624
Transportation	381,306,000	395,612,000	1,249,680	1,296,566	46,882
Drugstore	124,327,000	128,992,000	120,823	125,357	4,533

Apparel	122,879,000	127,489,000	340,934	353,726	12,791
Hardware	171,742,000	178,185,000	699,844	726,099	26,255
Vehicle Service	235,805,000	244,652,000	574,063	595,601	21,537
Miscellaneous	203,773,000	211,418,000	813,775	844,308	30,530
TOTAL	\$1,809,711,000	\$1,877,606,000	5,484,649	5,690,418	205,759

11

Sub-category	2015 Sales	2020 Sales	2015 Sq. Ft.	2020 Sq. Ft.	Change 2015-20 Sq. Ft.
Food	\$171,742,000	\$178,185,000	273,194	283,443	10,249
Supermarkets	143,404,570	148,784,475	217,280	225,431	8,151
Independents	13,739,360	14,254,800	34,348	35,637	1,289
Bakeries	3,778,324	3,920,070	12,594	13,067	472
Dairies	2,232,646	2,316,405	6,202	6,434	233
Others	8,587,100	8,909,250	2,770	2,874	104
Eat/Drink	200,878,000	208,414,000	478,281	496,224	17,943
General Merchandise	132,109,000	137,065,000	784,104	813,517	29,415
Dept. Stores	46,766,586	48,521,010	194,861	202,171	7,310
Variety Stores	9,511,848	9,868,680	55,952	58,051	2,099
Jewelry	9,115,521	9,457,485	12,839	13,320	482
Sporting Goods/Toys	14,399,881	14,940,085	57,600	59,760	2,161
Discount Dept.	49,540,875	51,399,375	450,372	467,267	16,895
Antiques, etc.	660,545	685,325	2,872	2,980	108
Others	2,113,744	2,193,040	9,608	9,968	360
Furniture	65,150,000	67,594,000	149,951	155,577	5,624
Furniture	9,837,650	10,206,694	31,734	32,925	1,190
Home Furnishings	13,551,200	14,059,552	50,190	52,072	1,883
Store/Office Equip.	10,293,700	10,679,852	21,445	22,250	804
Music Instr./Suppl.	2,801,450	2,906,542	14,007	14,533	525
Radios,TV, etc.	28,666,000	29,741,360	32,575	33,797	1,222
Transportation	381,306,000	395,612,000	1,249,680	1,296,566	46,882
New/Used Vehicles	133,457,100	138,464,200	333,643	346,161	12,517
Tires, Batt., Prts.	168,155,946	174,464,892	700,650	726,937	26,285
Marine Sales/Rentals	20,209,218	20,967,436	54,620	56,669	2,049
Auto/Truck Rentals	59,483,736	61,715,472	160,767	166,799	6,031
Drugstore	124,327,000	128,992,000	120,823	125,357	4,533
Apparel	122,879,000	127,489,000	340,934	353,726	12,791
Men's and Boy's	16,097,149	16,701,059	40,243	41,753	1,510
Women's and Girl's	40,795,828	42,326,348	110,259	114,396	4,137
Infants	2,580,459	2,677,269	8,602	8,924	323
Family	34,160,362	35,441,942	136,641	141,768	5,126
Shoes	25,681,711	26,645,201	29,184	30,279	1,095
Jeans/Leather	491,516	509,956	1,638	1,700	61
Tailors/Uniforms	2,211,822	2,294,802	11,059	11,474	415
Others	860,153	892,423	3,308	3,432	124
Hardware	171,742,000	178,185,000	699,844	726,099	26,255
Hardware	83,123,128	86,241,540	302,266	313,606	11,340
Lawn/Seed/Fertil.	3,263,098	3,385,515	9,597	9,957	360
Others	85,355,774	88,557,945	387,981	402,536	14,555
Vehicle Service	235,805,000	244,652,000	574,063	595,601	21,537
Gasoline	80,173,700	83,181,680	55,292	57,367	2,074
Garage, Repairs	155,631,300	161,470,320	518,771	538,234	19,463
Miscellaneous	203,773,000	211,418,000	813,775	844,308	30,530
Advert. Signs, etc.	3,260,368	3,382,688	11,856	12,301	445
Barber/Beauty shop	12,430,153	12,896,498	62,151	64,482	2,332
Book Stores	9,373,558	9,725,228	52,075	54,029	1,954
Bowling	4,686,779	4,862,614	46,868	48,626	1,758
Cig./Tobacco Dealer	1,426,411	1,479,926	2,853	2,960	107
Dent./Physician Lab	8,150,920	8,456,720	25,080	26,021	941
Florist/Nurseries	15,282,975	15,856,350	35,960	37,309	1,349
Laundry, Dry Clean	6,928,282	7,188,212	23,094	23,961	866
Optical Goods/Opt.	4,890,552	5,074,032	13,973	14,497	524
Photo Sup./Photog.	14,060,337	14,587,842	40,172	41,680	1,507
Printing	16,505,613	17,124,858	60,020	62,272	2,252

Paper/Paper Prod.	8,762,239	9,090,974	43,811	45,455	1,644
Gifts/Cards/Novel.	29,139,539	30,232,774	97,132	100,776	3,644
Newsstands	1,630,184	1,691,344	3,260	3,383	122
Video Rent/Sales	26,490,490	27,484,340	132,452	137,422	4,969
Others	40,754,600	42,283,600	163,018	169,134	6,116
TOTAL	\$1,809,711,000	\$1,877,606,000	5,484,649	5,690,418	205,759

Communities where residents spend entertainment dollars.

Communities	Percent
Rochester	72.3%
Utica	32.3%
Partridge Creek	51.3%
Other (please specify)	40.4%

Activities that the respondents would likely patronize if in or expanded in Shelby

Activity/Action/Facility	Percent
Recreation/Community Center	12.4%
Pool/Aquatic Activities	12.1%
Other	11.2%
Restaurants/Bars	9.3%
Walking/Bike Path	7.2%
Shopping Area/Department Stores	5.7%
Community Events/Activities	5.2%
Library	5.0%
Dog Park	4.6%
Downtown Development	4.4%
Sidewalks	4.4%
Gym/Fitness Center	3.4%
Grocery Stores	2.6%
Parks	2.3%
Movie Theater	2.1%
Sports/Outdoor Activities	1.6%
Senior Center	1.5%
Farmers Market	1.3%
Activities for Children	1.1%
Senior Services	1.1%
Less General Development	0.8%
Entertainment Venues	0.7%