

The City of The Village of Douglas Michigan

Prepared by:



Target Market Analysis The RETAIL Study

Final Report
April 19, 2019



Table of Contents

Narrative Report

Narrative Sub-header	Page
Analytic Approach Contacts	1
Reporting Format Infographics	3
Strategies and Retail Inventory	5
Net Import and Export (“Leakage”)	8
Retail Industry Trends	9
Target Market Analysis	11
Retail Market Parameters	12
Master Plan Review (see section k)	.

Analytic Approach | Contacts
Retail Market Study
The City of the Village of Douglas, Michigan

Analytic Approach – This 2019 Retail Target Market Analysis has been commissioned by the City of the Village of Douglas, Michigan. It has involved rigorous data analysis and the application of empirical models to measure the total market potential for retail, restaurants, and entertainment venues. Results of the analyses have been used to identify specific retail categories that represent the best growth opportunities for the city’s downtown district and the Blue Star Highway corridor.

Several analytic models have been completed in the study and to guide the conclusions and recommendations. The work includes studies of market share, import and export (a.k.a., “leakage”), industry trends, urban target markets inclined to shop in downtown districts, real estate analysis, economic assessment, PlaceScore™ analysis, and review of the city’s 2016 Master Plan. The study results are documented among the attached sections (i.e., chapters) with numerous Infographics, maps, and other supporting exhibits.

Field Work and Stakeholder Interviews – LandUseUSA made several trips to the Douglas and Saugatuck markets and toured the markets in 2016, 2018, and 2019. During these trips we gathered photo inventories of existing housing choices, observed the choices among established retailers and merchants, visited the waterfronts, and considered the overall marketability to resident shoppers, seasonal non-residents, visitors, commercial property developers, and new retail tenants.

Stakeholder Engagement – During this study process we facilitated a kick-off meeting and TMA Tutorial at the commencement of the work (in January 2019). We also conducted phone interviews with ten private-sector developers, stakeholders, and consultants that have experience working the Douglas market. At the end of April, we also returned to Douglas to “roll out” the study results, and had additional discussions with stakeholders. Questions and stakeholder input during that event are being documented and may be used to refine this draft narrative report.

Contact Information – Stakeholders are invited to contact LandUseUSA | Urban Strategies directly with any questions regarding the work approach, methodology, findings, and conclusions. Similarly, the City of the Village of Douglas can be contacted directly with any questions regarding its plans or community vision; the stakeholder engagement process; and next-steps for prospective developers and potential investors. Contact information is provided on the following page.

The Project Manager

Lisa Imus, Director
Economic Development
(269) 857-1438 office
limus@ci.douglas.mi.us
The City of the Village of Douglas



The Consultant

Sharon Woods, CRE, CNUa
Principal, Market Analyst
(517) 290-5531 direct
sharonwoods@landuseusa.com
LandUseUSA | Urban Strategies



Reporting Format | Infographics
Retail Market Study
The City of the Village of Douglas, Michigan

This narrative report for the City of Douglas' retail market study is designed to be as succinct as possible. It focuses on key observations and conclusions rather than methodologies, data sources, and analytic approach. For readers unfamiliar with the enclosed materials and Infographics, it is recommended that the [Table of Contents](#) be reviewed first. Then, the information on each page should be read in this order: main title, graph or chart title, x-axis title and labels, y-axis title and labels, the data shown in the chart, the footnote with the data source, and then any summary paragraphs on the page.

Any number of the enclosed Infographics may be extracted, shuffled, and printed to facilitate additional meetings and discussions. Developers are welcome to include a copy of the entire report and narrative in loan and/or grant applications. Individual graphs can also be converted into .jpg images, cropped, and inserted into slide presentations. However, we respectfully ask that all extracted Infographics, analytic results, and conclusions be fully credited to LandUseUSA, and on behalf of the City of the Village of Douglas.

Outline of attached Infographics by topic:

Summary Strategies	section a
Detailed Inventory	section b
Market Share Analysis	section c
West Shore Leakage Analysis	section d
Industry Trends	section e
71 Lifestyle Clusters	section f
Target Market Profiles	section g
Market Parameters	section h
PlaceScore™ Analysis	section i
Geographic Setting	section j
Master Plan Review	section k

Readers are encouraged to study all of the attached Infographics and strive to draw some conclusions on their own. They are also encouraged to identify direct and indirect relationships between the variables, because many of them are indeed correlated. For example, urban residents also tend to be downtown shoppers, whereas suburbanites are more inclined to export expenditures to big-box formats located in regional shopping destinations. Urbanites are more inclined to be singles or empty nesters, will eat out regularly, might buy compact furniture for their compact lofts, and thrive on downtown entertainment venues that provide opportunities to feel socially connected.

Geographic Overview – The information displayed in the Infographics varies by geography, sometimes showing national averages, statewide averages, and comparisons for West Michigan Counties, West Shoreline Communities, Allegan County, and the cities of Douglas, Fennville, and Saugatuck. Comparisons to Saugatuck are essential to the analysis because the city shares the economic market with Douglas. They also must compete for every new resident moving into the area; developers seeking investment opportunities; and visitors looking for unique merchants, restaurants, and entertainment venues. (See maps in the attached [section k](#).)

Note: Many of the attachments will provide information that is reported for and abbreviated as “The City of Douglas”. This is done only for the sake of brevity, and it is understood that the municipality’s full and proper name is “The City of the Village of Douglas”.

Years, Numbers, and Percentages – The years of the data shown in the exhibits will also vary, and might include some forecasts. Depending on each variable, the information might also be reported as actual numbers or as percentages. Again, footnotes at the bottom of each page also document the data source.

Strategies and Retail Inventory
Retail Market Study
The City of the Village of Douglas | April 2019

The first few Infographics displayed in attached [section a](#) of this report summarize the inventory of existing retailers by category, and also identify the market potential for new establishments. LandUseUSA recommends that the City of Douglas consider the following retail strategies to improve the mix of choices that meet the needs of year-round residents, seasonal non-residents, and occasional visitors and vacationers.

Total Market Potential – Retail Anchors and Merchants

- Hardware store (up to 14,000 sf)
- Pharmacy (up to 8,000 sf)
- Automotive parts & supply store (up to 8,000 sf)
- Five-and-dime or general store (up to 8,000 sf)
- Camping and kayaking outfitters store (up to 4,000 sf)
- Small hobby and game stores (up to 2,000 sf)
- Party supplies, costumes, and event planning (up to 3,000 sf)
- Ready-to-assemble furniture (up to 6,000 sf)
- International specialty grocery store (up to 3,000 sf)
- Apparel and fashion accessories (up to 3,000 sf)

The list above includes typical square footages for the larger anchors like hardware, pharmacy, automotive parts, general stores, outfitters, and furniture. Several smaller shops could share space among the other categories. For examples, a small hobby shop might have 1,000 square feet, and a game and toy store could add 1,000 square feet, for a total of 2,000 square feet. In general, the total market potential for new retail space is in the range of 30,000 to 50,000 square feet.

Retail and Merchants - New retail anchors and merchants can be located either in the downtown or along the Blue Star Highway. However, any new buildings developed along Center Street should be guided by a new downtown subarea plan (and perhaps regulated by a hybrid or complete form-based code). At a minimum, the zoning ordinance should regulate the placement and ratios of parking, on-street parking, sidewalks, build-to lines, scale and height, facade treatments, exterior materials, etc.

Subarea plans and zoning can help address the future possibility of national chains seeking locations within the city. For example, a dollar store, chain pharmacy store, automotive parts, or thrift store might seek locations that allow them to build fragmented, free-standing stores with deep set-backs from the street and wrapped by parking fields. A proactive approach is recommended to ensure shallow set-backs, build-to lines, and parking at the back. These types of guidelines can help ensure that the new stores are helping create a sense of place and enjoyable shopping environment, and will help prevent the development of formats that undermine the city's unique character.

Specialty Foods – It is also recommended that the City of Douglas consider the following retail strategies to improve the mix of specialty food choices that meet the needs of both year-round residents, seasonal non-residents, and occasional visitors and vacationers: 1) Small event facility with commercial kitchen that can be leased for special parties and occasions, and that can be catered. 2) Several restaurants with unique cuisine, theme, and entertainment value. 3) Specialty foods within the new International grocery store, such as locally grown and made, organic, whole foods, vitamins and supplements, prepared party trays, and novelty supplies.

One or two new restaurants are supportable in the market, but only if they offer unique cuisine, theme, and entertainment value. Only one restaurant is recommended at a new municipal marina, and it should be matched with at least one new restaurant in the downtown. The city should also anticipate interest from national chain and fast food restaurants, and should ensure that the regulating plans and ordinances are in-place to address that possibility.

Entertainment Venues – The City of Douglas should also consider the following strategies to improve the mix of choices that meet the needs of both year-round residents, seasonal non-residents, and occasional visitors and vacationers: 1) Consistent with the Waterfront Plan, build a new municipal marina that can be programmed with year-round and transient boat slips, day cruises, fishing charters, boat rental, and novelty boating venues. 2) Incubate a vineyard that is located within or very close to the city and add a chapel and commercial kitchen that can be rented for special events and catered by the vineyard, local chefs, and/or restaurants/delis.

Municipal Marina – Aside from the existing boater's convenience and supply store at Tower Marine, additional retail is explicitly not recommended at a new municipal marina. Instead, trolleys and bike share programs should be added at the marina and docks, plus display boards of maps guiding marina patrons along clearly marked routes. The city's antique market, musical events, and any future farmers' market should stay in the downtown and should not be relocated out to a new marina. These amenities are needed to convert visitors into shoppers for downtown merchants.

Trolley, bicycle, and pedestrian routes into the downtown should be along the shortest distance across the Blue Star Highway, south to Center Street, and then east along Center Street. Non-vehicular traffic should not be diverted along the shoreline, because it risks bypassing the downtown and its merchants. (Important – please see the maps, planning resources, and three-page checklist provided in [section k](#)).

Retail Sales Benchmarks – Additional exhibits in [section a](#) are intended to provide guides and insight into retail sales and sales per square foot. These resources can help investors, developers, and prospective entrepreneurs understand the retail trade industry before building more commercial space or opening a new business.

The exhibits demonstrate variances in sales per square foot by retail category; sales per employee by total number of employees; total sales per store by county along Michigan's west shoreline; and annual growth of sales for Allegan County for retail, hotels and restaurants, and arts and entertainment venues. Additional information on national industry trends is also provided in attached [section e](#).

Detailed Retail Inventory – Section b of this report provides a detailed inventory of all businesses catalogued by LandUseUSA as part of this retail market strategy. The list is based on several resources, namely Dun & Bradstreet, www.Saugatuck.com, and Google Earth. Many – but not all – of the retailers and businesses have been field-verified by LandUseUSA during its market tours in late 2018 and early 2019. Within reason, the list can be refined based on stakeholder input, such as recent closures or new store openings. However, perfection is the not the goal; and perfection probably would not change the outcome of this study, conclusions, or recommendations.

Again, this short narrative does not explain every step of the analysis detailed in the attachments. Therefore, readers are encouraged to browse and study all of the Infographics for additional recommendations and strategies.

Net Import and Export ("Leakage")
The Market Share Analysis
The City of the Village of Douglas | April 2019

The balance of this narrative report serves mainly as a guide to the remaining exhibits in [section c](#) through [section k](#). It does not include a detailed explanation of the data sources, methodologies, or analytic results. Rather, it focuses on key observations, implications, relationship between the variables, conclusions, and possible implications for the market potential among retail, restaurants, and entertainment venues. Again, readers are encouraged to browse the attached Infographics, study the data, and strive to assess the implications for the new retail in the City of Douglas.

Net Import-Export Summary – The first exhibit in [section c](#) provides a summary of the net import and export by category. The term "net" means that both import and export are accounted for in the data. For example, local residents might be exporting their spending on apparel to other cities, which could be more than offset by the import of spending by visitors and non-residents. The net effect is import of +25% (measured as a share of expenditure potential).

Market Share Analysis – Several retail categories represent significant net import categories for the Douglas-Saugatuck local market, whereas others are net exports. The local market has a net import of retail sales in the following categories: boats and boating supplies; home furnishings and décor; specialty food stores; apparel and accessories; sporting goods; gifts, novelty, and stationary; arts and entertainment; overnight accommodations; and restaurants.

The market also has significant net export in the following categories: automotive supplies; furniture; appliances and electronics; hardware stores; pharmacies; general merchandise; and office supplies. Visitors are buying some of these products in their home markets; and many of the local residents are driving to Holland, South Haven, and Grand Rapids to shop the national chains. They represent opportunities to intercept some of the "leakage" to the bigger cities by offering more local choices.

The figures for the local Douglas-Saugatuck market are based on the market share analysis documented with scatter plots and provided in [section c](#). The figures for Allegan County are based on a similar market share analysis documented with histograms in the following [section d](#). The scatterplots shows all available data for all cities and villages in Michigan; whereas the histograms highlight only the counties located along Michigan's West Shoreline.

Retail Industry Trends
The Retail Market Analysis
The City of the Village of Douglas | April 2019

Retail is Not “Dead” – Mainstream media channels tend to promote the misconception that brick-and-mortar retail is somehow dead or dying – but this couldn’t be farther from the truth. The reality is that shoppers are demanding an enjoyable shopping experience that engages all of the senses, and convention big-box formats have failed to deliver. Consumers are abandoning conventional chains and finding more enjoyable experiences online, and in traditional downtown districts. They are also exploring town centers and other urban places in search of unique merchandise, high service, convenience, and added value with restaurants and entertainment venues.

Many redundant and over-built retail formats have fallen out of favor with consumers; and some are now struggling after years of failing to keep up with the changing preferences of savvy shoppers. Value-priced big-box discount department stores, conventional department stores, national chains, and “category killers” have over-built stores to monopolize markets and demonstrate portfolio growth needed to satisfy demanding shareholders. Now they are attempting to correct the imbalance by closing redundant stores and right-sizing the locations that were over-built in the first place.

Downtown Merchants Strategies – The right-sizing and contracting of redundant big-box retail presents new opportunities for downtown districts and independent merchants. However, they must compete aggressively to win shoppers back. This involves a strategy of unique merchandise that cannot be found online (such as handmade, artisanal, locally grown, etc.), convenience, high levels of service, and a complete shopping experience that engages all of the senses. A lowest-price strategy is not necessary as long as these other elements can be successfully provided. Placemaking is an important and essential part of that process.

Industry-Wide Trends are Healthy – The exhibits in attached section e are intended to provide real data that demonstrates the overall good health of the retail trade industry. The exhibits include line charts showing normal fluctuations in same store sales from one decade to the next; gains in sales per square foot over time; stable retail expenditures as a share of income; and the halo effect of omni-channel marketing and sales platforms.

Halo Effect of Omni-Channels – On the latter topic of omni-channel sales, an exhibit is attached to demonstrate the concept of using internet and online sales to build brand and store loyalty, which generates repeat shopping and higher sales overall. Online sales can help build brand loyalty and actually bring shoppers into brick-and-mortar stores to explore products and merchandise – which they might still buy online. Local merchants in downtown Douglas should each have a website, profile through social media platforms, and a system for accepting phone orders with ease. After these channels are in place and operating smoothly, the next step is to also enable online orders through the primary website.

Best Business Practices – Related best business practices for downtown merchants include the following:

- Maintain diligent and reliable store hours, often staying open until 7:00 pm or later.
- Maintain reliable days of business, including Sundays and throughout the season.
- Proprietors should park remotely, never taking a space from a prospective shopper.
- Always speak positively about the downtown and cross-promote whenever possible.
- Provide unique goods, convenience, high-service levels, and experience – not low price.
- Convenience: easy to find locations, two-way traffic, front door parking, walkable setting.
- Convenience: synergistic benefits of retail clustering, and avoiding retail fragmentation.
- Service: phone orders, in-store orders, social media communication, cross-marketing, etc.
- Unique: artisan and hand-crafted products, locally made or grown, made in the USA.
- Experience: scents, contemporary music, tastings, rest areas and restrooms, etc.

Target Market Analysis
The Retail Market Analysis
The City of the Village of Douglas | April 2019

71 Lifestyle Clusters – Exhibits in attached [section f](#) are intended to emphasize the value of having a downtown district that is linked to a waterfront with amenities and entertainment venues. There is good evidence that residents living along Michigan’s Great Lakes Shorelines are more likely to dine out and take advantage of recreational venues like trails, beaches, and marinas. Households living in downtowns and other urban places are also more likely to visit brewpubs, local merchants, restaurants, and theaters.

Douglas Lifestyle Clusters – The local market has 268 resident households in the “Booming and Consuming” lifestyle cluster, plus 42 households in the “Golf Carts and Gourmets” category, 19 households in the “Platinum and Prosperity” category, and 52 “Reaping Rewards” households. These groups are important because they are relatively affluent and big-spenders on retail. However, they also tend to live in detached houses in suburban locations. They are rarely found living in downtowns or urban neighborhoods nearby.

The Link to Urban Housing – To support more retail space, the City of Douglas should also focus on providing more urban housing choices that will meet the needs and expectations of urbanites inclined to live in the downtowns – and shop its merchants. LandUseUSA recommends that urban townhouses and lofts be pursued in the downtown to bring more residents within walking distance of the shops. These urbanites are more inclined to shop the downtown merchants than drive to regional shopping destinations like Holland or Grand Rapids.

Prevalent Lifestyle Clusters – In the City of Douglas, the most prevalent “urbanite” target market and resident shopper is the “Digitally Dependent” category, currently represented by only 20 households. Other groups like “Wired for Success”, “Bohemian Groove”, “Rooted Flower Power”, and “Urban Ambition” are under-represented but are growth opportunities for both downtown housing and patrons for merchants and eateries. The two industries of housing and retail are intertwined, and both are needed to foster economic growth and progress for the downtown.

Target Market Profiles – Narratives describing the city’s most prevalent lifestyle clusters are provided in attached [section g](#). A profile of the most affluent households from the Chicago metro area is also provided. The Chicago profile is explained in greater detail within the Residential Target Market Analysis (a companion report to this retail study).

Chicago Urbanites are Targets – There are about 23 households owning property in Douglas who are actually living in Chicago, and they are also classified as “Urban Edge” households. In addition, another 14 households are characterized as “Jet Set Urbanites”. These two groups of urbanites represent excellent targets for downtown housing choices and spending on downtown merchants. They represent ideal growth opportunities for the city’s downtown investors and developers, and particularly for converting property owners into seasonal and year-round residents.

Market Parameters
The Retail Market Analysis
The City of the Village of Douglas | April 2019

Market Parameters – The exhibits enclosed in the attached [section h](#) to this report are intended to document and highlight some market parameters that are most relevant to the retail market analysis for the City of Douglas. They include a map showing a 50% primary trade area for the local market (with 50% import by seasonal non-residents and visitors).

The trade area map is followed by histograms demonstrating population and income forecasts for the city and the trade area. Population and per capita income are combined to forecast total personal income and complete the market share and leakage analyses (see [section c](#) and [section d](#)). Total personal income is the basis for estimating the expenditure potential of local residents.

The average Michigan households spends 50% of their income on total retail trade, so anything above that threshold is deduced to be import, and anything less can be interpreted as export. Note: The 50% figure includes big-ticket items like automobiles, boats and recreational vehicles, appliances, furniture, computers, electronics and jewelry, as well as weekly staples like groceries, gasoline, and pharmaceuticals.

Economic Assessment – A few variables have also been tested to gauge the general health of local economy. In general, results indicate that residents of both Douglas and Saugatuck are well-educated and a relatively large share is employed in white collar jobs. Douglas also has good labor force participation rates (58%) and low unemployment rates (3.6%). It is importing 590 daytime workers, and exporting about 400 commuters to jobs in other locations, for a net gain of +190 daytime workers (+32%).

Real Estate Analysis – The last exhibit in [section h](#) is a scatter plot showing the relationship of asking rent per square foot to total available space along the Michigan West Shoreline communities (including Douglas and Saugatuck, but with very few observations in those cities). This information can help local owners and landlords of commercial space estimate probably tolerance of prices, and depending on the building size and general location.

PlaceScore™ Analysis – LandUseUSA has also applied its PlaceScore methodology to test the overall score for the City of Douglas. Based on 30 criteria, the city has a total score of 19 points, which is good relative to its small city size. However, given its lakefront setting and significant import, it could easily achieve a higher score of at least 22 points, and perhaps an even higher score of 24 points. A few simple strategies could be undertaken to achieve that goal, such as providing signs for off-street parking, sponsoring workshops with the Incremental Development Alliance, and ensuring that amenities and attractions are easy to find online.

...

See also [section j](#) for maps on the local market's geographic setting.
See [section k](#) for exhibits and checklists related to a review of the city's 2016 Master Plan.

Table of Contents

Attachments

Summary Strategies	section a
Detailed Inventory	section b
Market Share Analysis	section c
West Shore Leakage Analysis	section d
Industry Trends	section e
71 Lifestyle Clusters	section f
Target Market Profiles	section g
Market Parameters	section h
PlaceScore™ Analysis	section i
Geographic Setting	section j
Master Plan Review	section k

section **a**

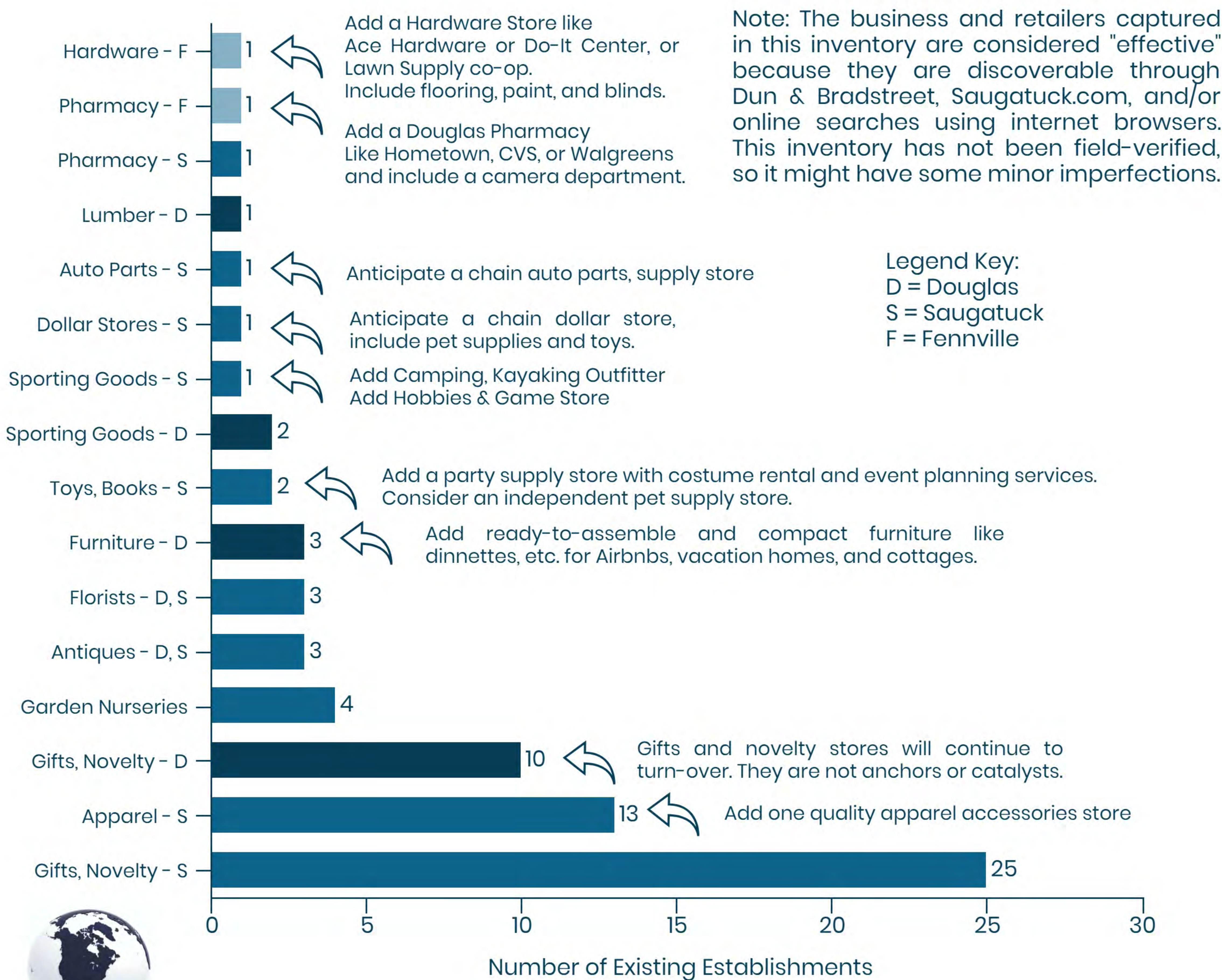
Summary Strategies

Retail Inventory & Capacity | Douglas

A qualitative assessment of retail inventories and probable needs.

Key Recommendations

LandUseUSA recommends that the City of Douglas consider the following retail strategies to improve the mix of choices that meet the needs of both year-round residents, seasonal non-residents, and occasional visitors and vacationers: Hardware, Pharmacy, Automotive Parts & Supplies, Dollar Store, Camping & Kayaking Outfitters, Hobby & Game Store, Party Supply and Event Planning Store, Ready-to-Assemble Furniture, International Specialty Grocery Store, and a quality Apparel Store. New retail anchors and merchants can go in the downtown or along the Blue Star Highway. However, any new buildings developed along Center Street should be guided by a new downtown subarea plan (and perhaps regulated by a form-based code). At a minimum, the zoning ordinance should regulate the placement and ratios of parking, on-street parking, sidewalks, build-to lines, scale and height, facade treatments, exterior materials, etc.



LandUseUSA
UrbanStrategies

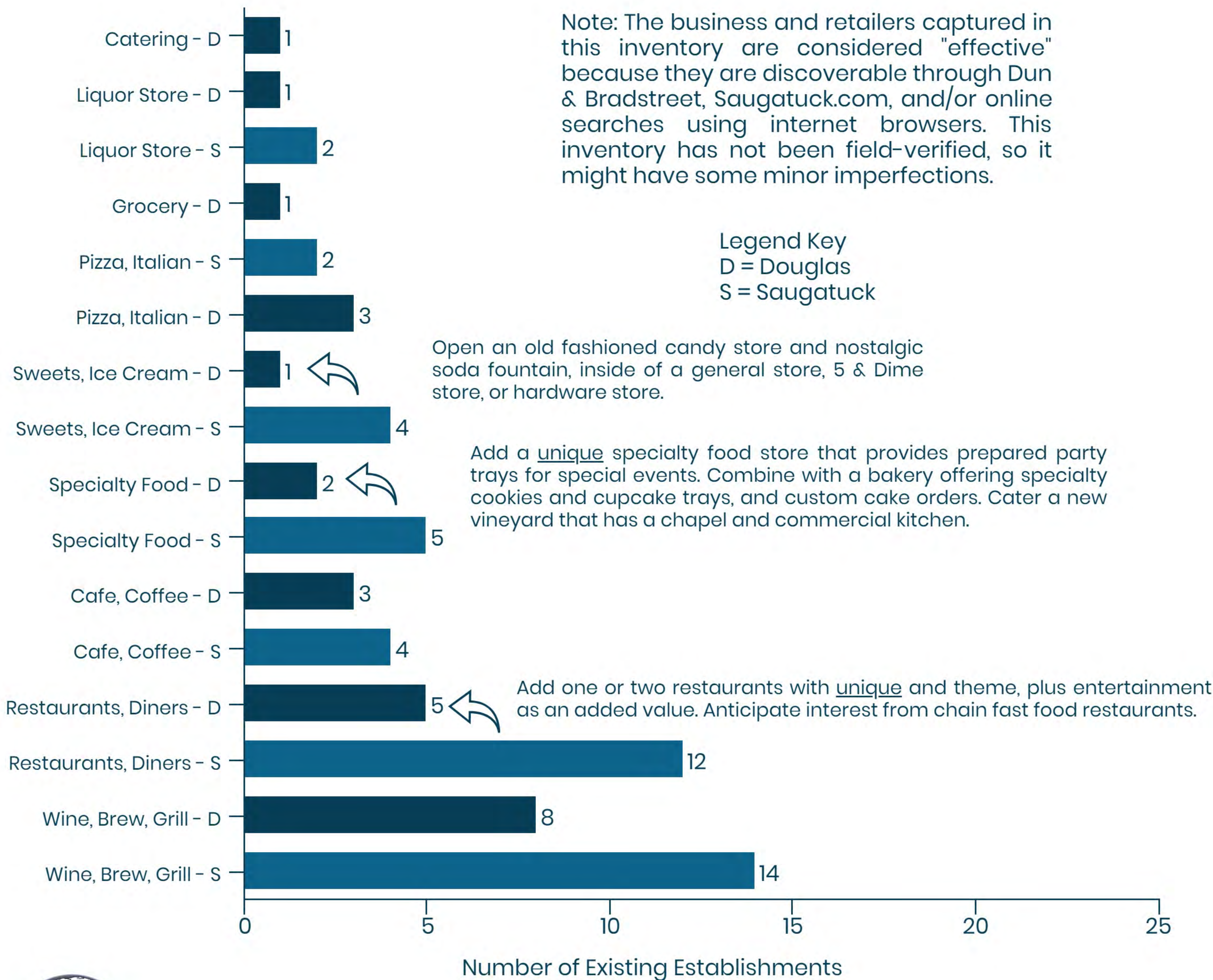
Analysis & exhibit prepared by LandUseUSA | Urban Strategies © on behalf of the City of the Village of Douglas, 2019.

Eateries Inventory & Capacity | Douglas

A qualitative assessment of supply and probable needs among restaurants.

Key Recommendations

LandUseUSA recommends that the City of Douglas consider the following retail strategies to improve the mix of choices that meet the needs of both year-round residents, seasonal non-residents, and occasional visitors and vacationers: 1) Small event facility with commercial kitchen that can be leased for special parties and occasions, and that can be catered. 2) Several restaurants with unique cuisine, theme, and entertainment value. 3) Specialty food categories within a new International grocery store, such as locally grown and made, organic, whole foods, vitamins and supplements, prepared party trays, and novelty items.

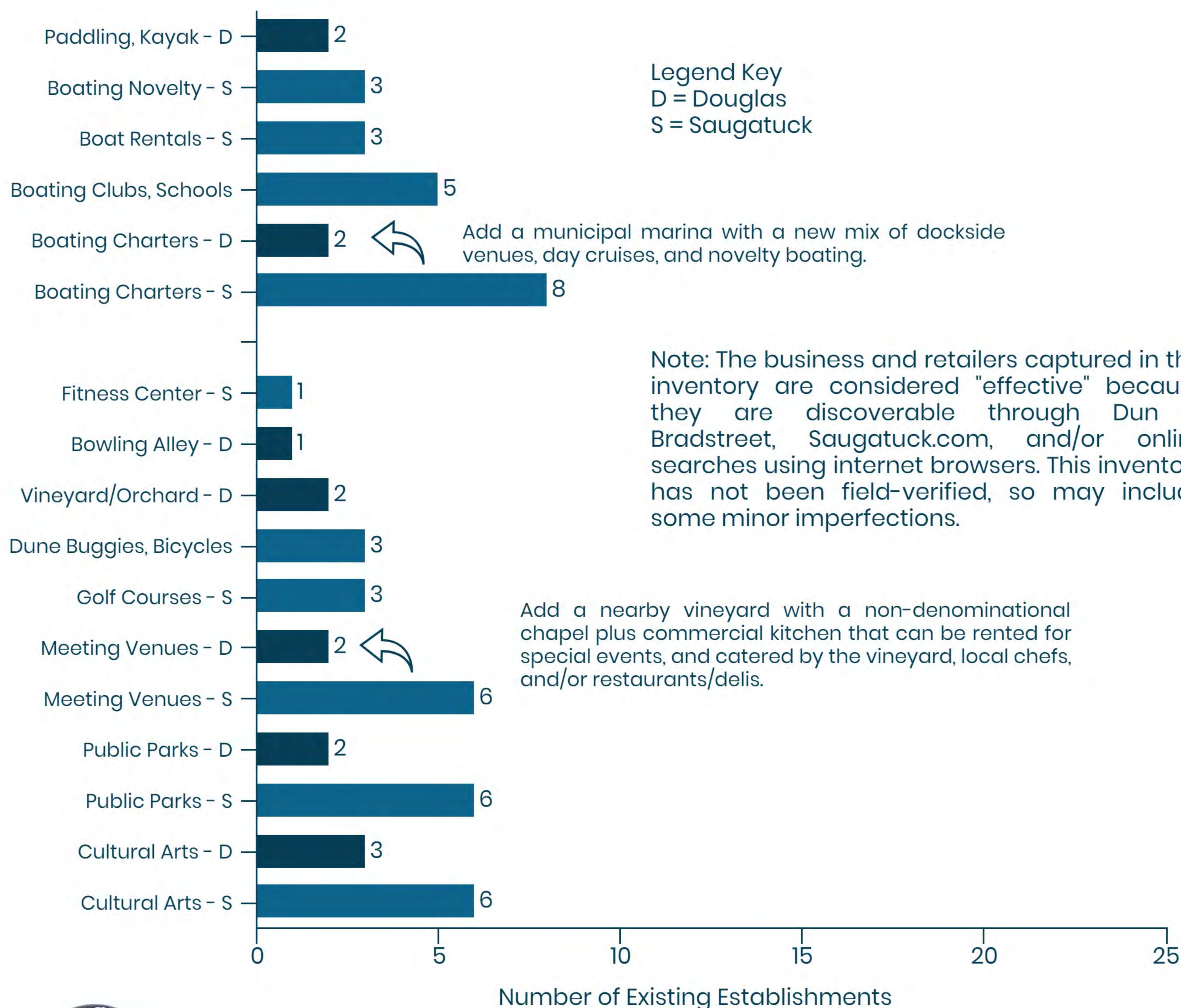


Venues Inventory & Capacity | Douglas

Assessment of supply and probable needs among entertainment venues.

Key Recommendations

LandUseUSA recommends that the City of Douglas consider the following strategies to improve the mix of choices that meet the needs of both year-round residents, seasonal non-residents, and occasional visitors and vacationers: 1) Consistent with the Waterfrong Plan, build a new municipal marina that can be programmed with year-round and transient boat slips, day cruises, fishing charters, boat rental, and novelty boating venues. 2) Incubate a vineyard that is located within or very close to the city and add a chapel and commercial kitchen that can be rented for special events and catered by the vineyard, local chefs, and/or restaurants/delis.

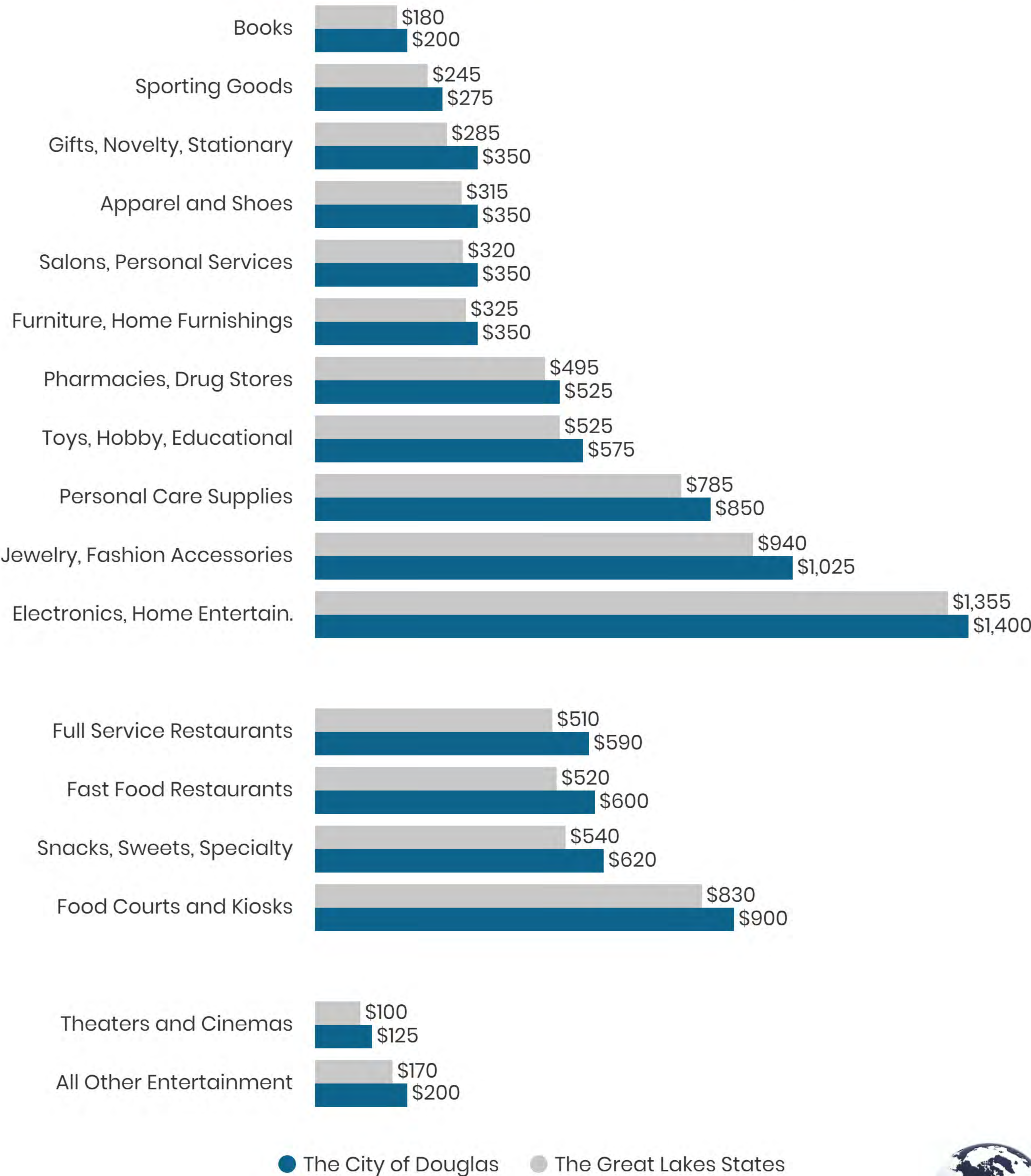


LandUseUSA
UrbanStrategies

Analysis & exhibit prepared by LandUseUSA | Urban Strategies © on behalf of the City of the Village of Douglas, 2019.

Sales per Square Foot | The City of Douglas

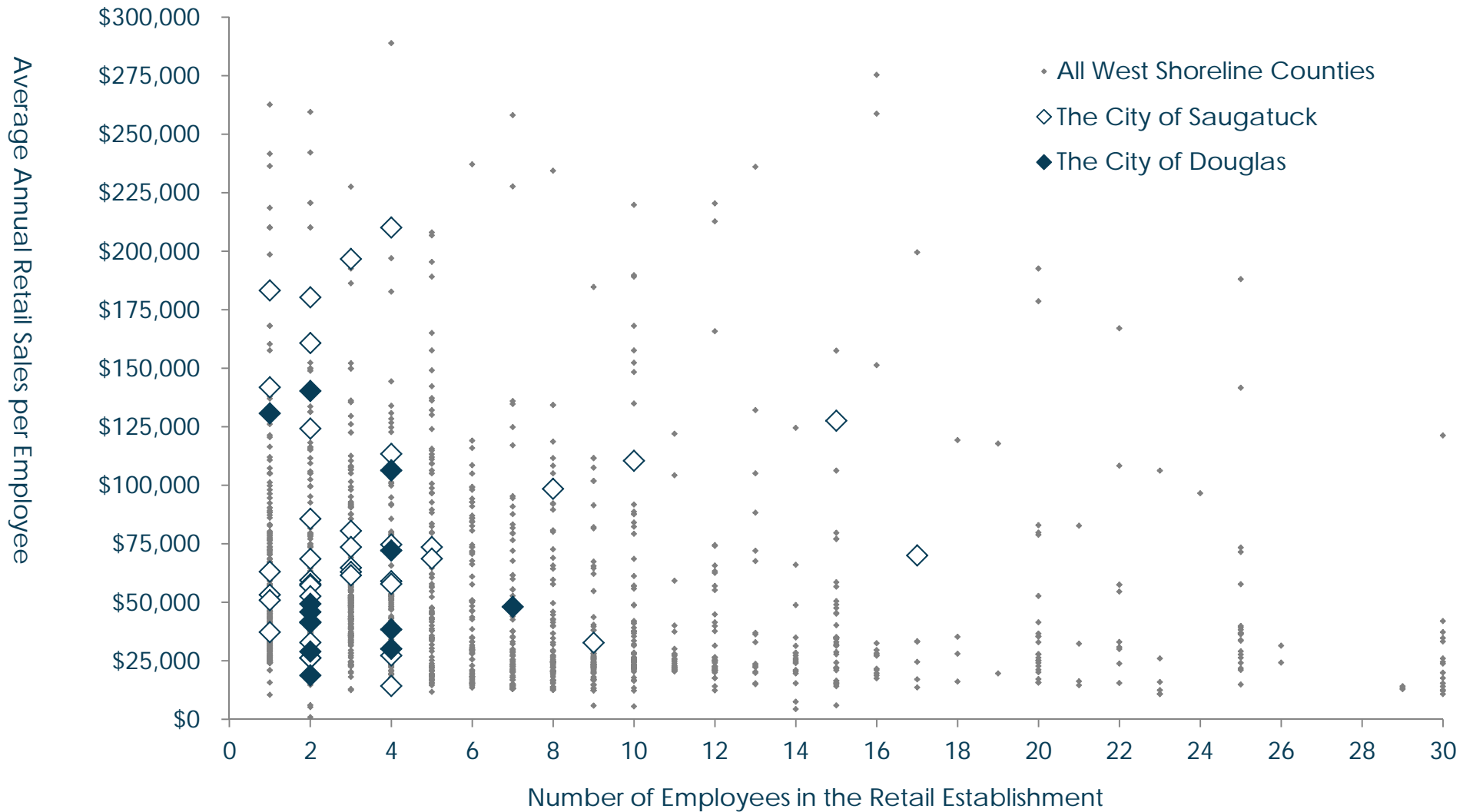
Average sales per square foot by retail category, forecast to the year 2020.
Reflects relatively high incomes of local residents, plus seasonal visitor import.



Underlying data provided by the International Council of Shopping Centers through year-end 2017. Analysis & exhibit prepared by LandUseUSA | Urban Strategies © on behalf of the City of Douglas, 2019.



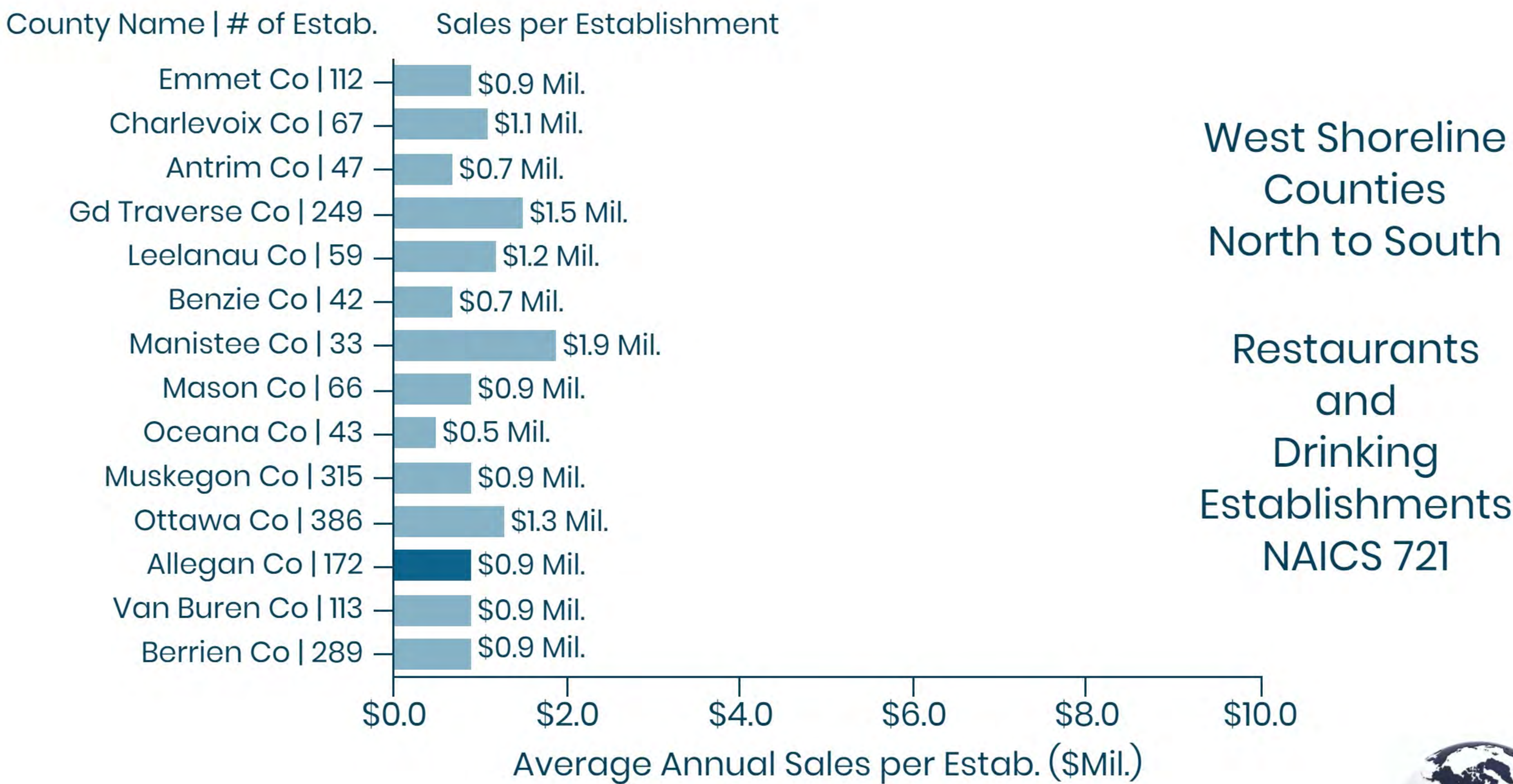
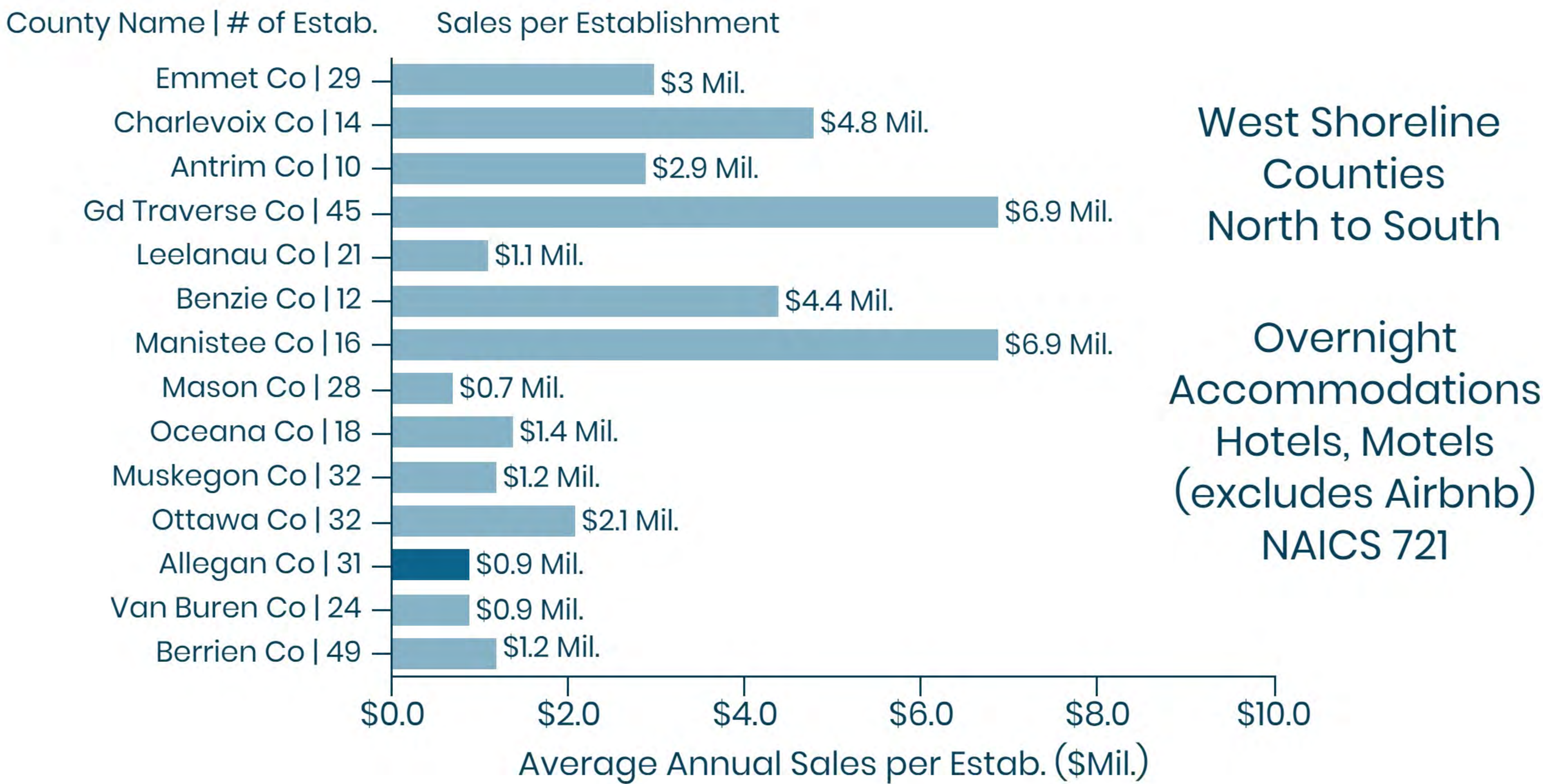
Average Annual Retail Sales per Employee The Cities of Douglas and Saugatuck v. Michigan West Shoreline Counties



Source: Underlying data provided by Dun & Bradstreet and licensed to LandUseUSA | Urban Strategies through eSite Analytics. Analysis and exhibit prepared by LandUseUSA | Urban Strategies on behalf of the City of Douglas, Michigan, 2019.

Sales per Store | West Shoreline Cos.

A comparison of transacted retail sales per establishment, forecast to 2020.

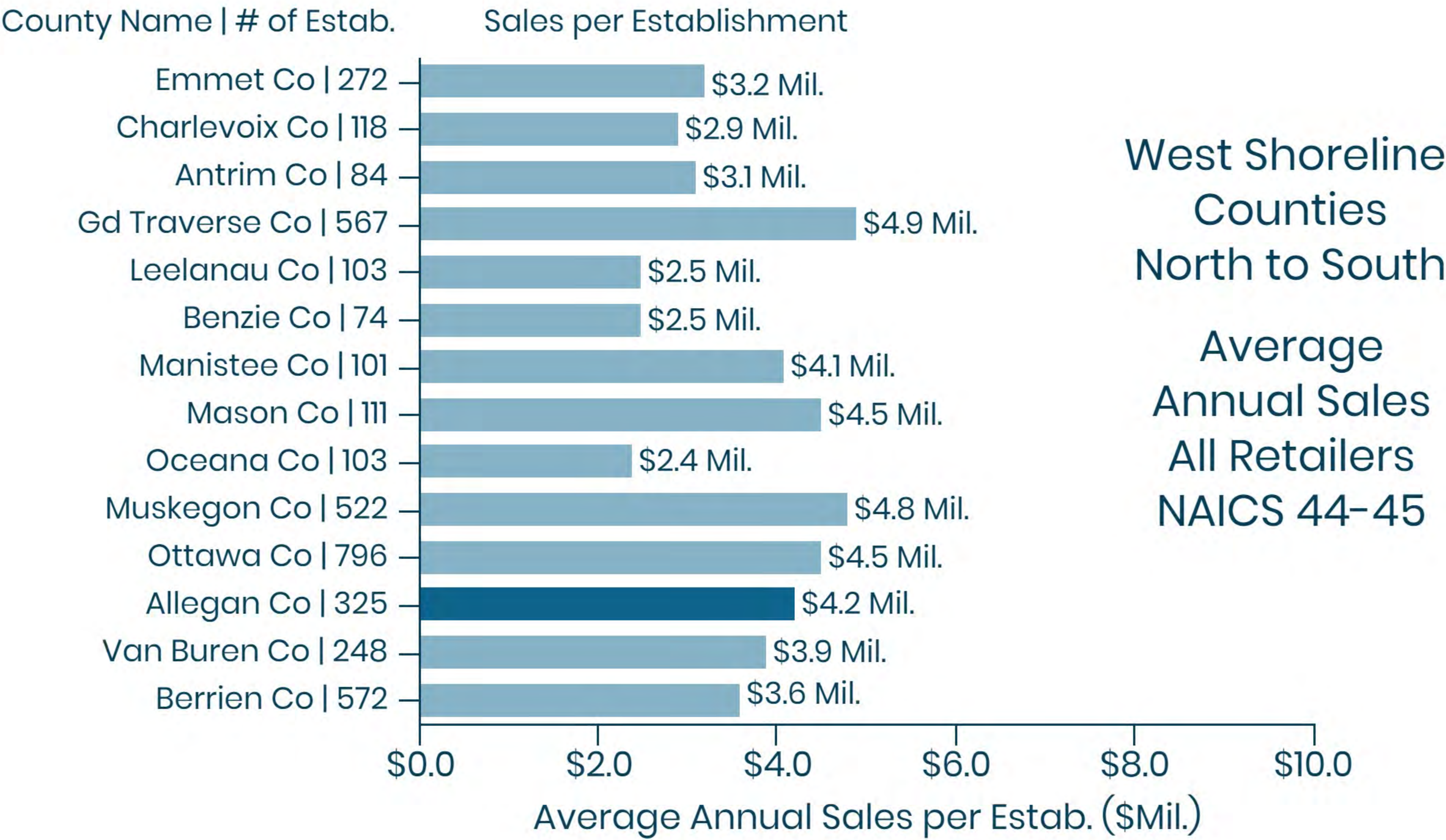


Source: Underlying data provided by the Economic Census with forecasts to 2020 by LandUseUSA Urban Strategies ©. NAICS indicates the North American Industrial Classification System as established by the US Census; n/a indicates that data is not available.



Sales per Store | West Shoreline Cos.

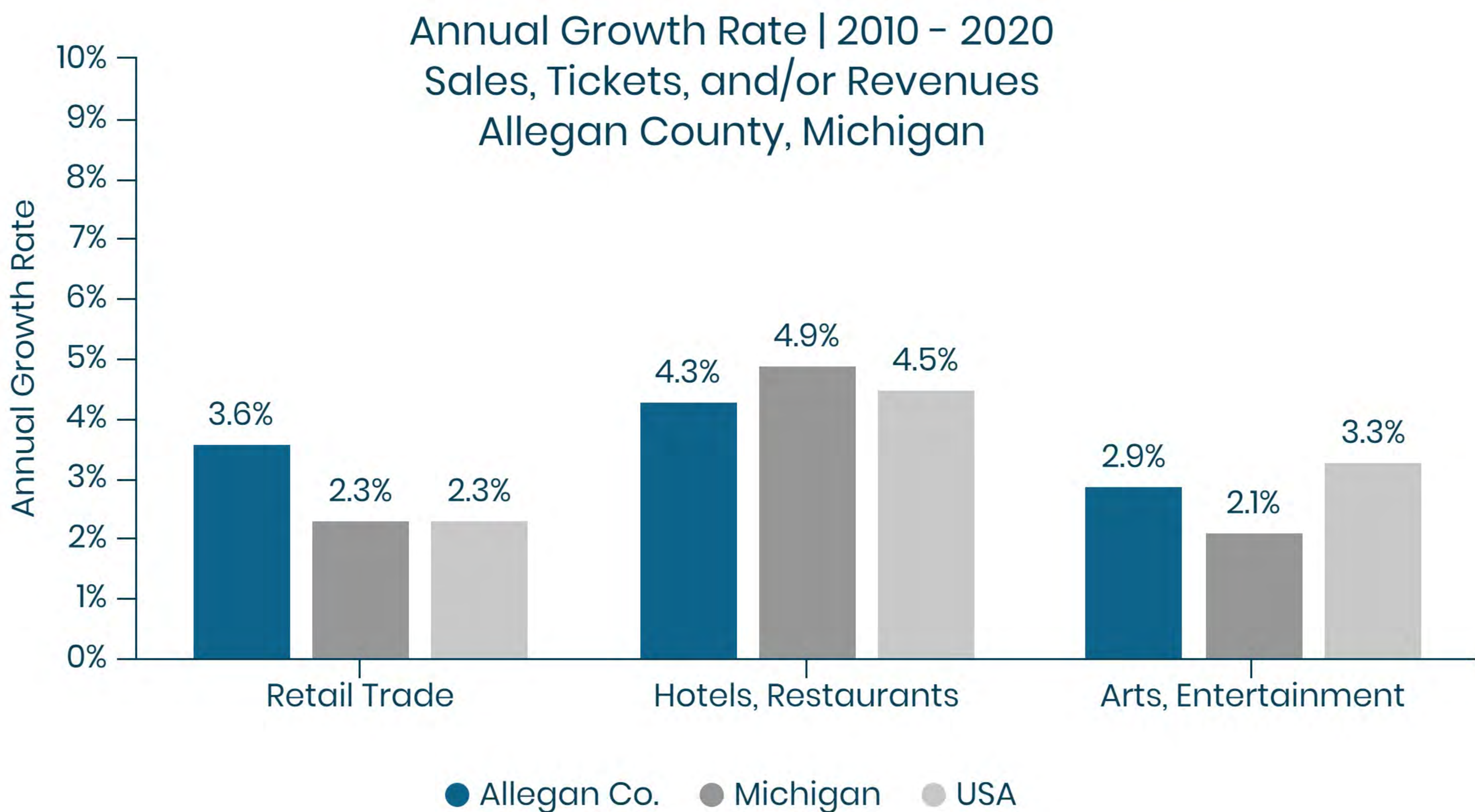
A comparison of transacted retail sales per establishment, forecast to 2020.



Source: Underlying data provided by the Economic Census with forecasts to 2020 by LandUseUSA Urban Strategies ©. NAICS indicates the North American Industrial Classification System as established by the US Census.



Annual Growth Rates | Allegan Co.



Underlying data represents estimates only; analysis based on the U.S. Census Bureau's County Business Patterns through 2018. Prepared by LandUseUSA | Urban Strategies © with full copyrights and all rights reserved.



section **b**

Detailed Inventory

Inventory of Boating and Water-Oriented Venues

The Cities of Douglas, Fennville, and Sautgatuck | 2019

1	Clubs, Schools	Douglas	Sailing On Desire Club	216 Saint Peters Drive
2	Clubs, Schools	Douglas	SeaSun Sailing School	320 N. Union Street
3	Clubs, Schools	Douglas	Tower Marine Marina	Douglas
1	Clubs, Schools	Saugatuck	Saugatuck Yacht Club & SYC Sailing	15 Park Street
2	Clubs, Schools	Saugatuck	Singapore Yacht Club	40 Butler St
1	Paddling	Douglas	Running Rivers Kayaks	Wade's Bayou
2	Paddling	Douglas/Fennville	Velocity Adventures - Paddleboards	5928 122nd Ave
1	Boat Rental	Saugatuck	Old Boat House/ Retro Boat Rentals	703 Water Street
2	Boat Rental	Saugatuck	Makin' Waves Boat Rental	528 Water St
3	Boat Rental	Saugatuck	MIRYHA/Sweetwater Sailing	868 Holland St.
1	Novelty	Douglas	West Michigan Cycleboat	219 N. Union St.
1	Novelty	Saugatuck	Saugatuck Chain Ferry	528 Water Street
2	Novelty	Saugatuck	Harbor Duck Adventures	129 Griffith St.
1	Charter	Douglas	TFD Adventure Co. - Charter Boat	219 N. Union Street
2	Charter	Douglas	U S Male Charters	at Tower Marine
1	Charter	Saugatuck	Yacht Boat Charters	220 Water Street
2	Charter	Saugatuck	Coastal Tours	3364 Gaslight Ln
3	Charter	Saugatuck	Big Lake Outfitters of Saugatuck	640 Water Street
4	Charter	Saugatuck	West Michigan Charter Fishing	641 Water Street
5	Charter	Saugatuck	Best Chance Too Charters	650 Water Street
6	Charter	Saugatuck	Star of Saugatuck Boat Cruises	716 Water Street
7	Charter	Saugatuck	Retirement Home Fishing Charters	730 Water St
8	Charter	Saugatuck	Can't Miss Charter	865 Holland St

Sources: Dun & Bradstreets, www.Saugatuck.com, and field observations by LandUseUSA | Urban Strategies, 2019.
Inventory prepared on behalf of the City of Douglas, may include some minor imperfections.

Inventory of Entertainment Venues excluding Boating

The Cities of Douglas, Fennville, and Saugatuck | 2019

1	Cultural Arts	Douglas	Saugatuck Douglas Old School House	130 W Center Street
2	Cultural Arts	Douglas	Dunes Resort Entertainment Complex	333 Blue Star Highway
3	Cultural Arts	Douglas	Express Yourself Art Barn	6459 130th Street
1	Cultural Arts	Saugatuck	Village Puppeteers	248 Mason Street
2	Cultural Arts	Saugatuck	Ox-Bow, School of Art & Artist's Residency	3435 Rupprecht Way
3	Cultural Arts	Saugatuck	Saugatuck Center for the Arts - Events	400 Culver Street
4	Cultural Arts	Saugatuck	Saugatuck-Douglas History Center	735 Park Street
5	Cultural Arts	Saugatuck	Chamber Music Festival of Saugatuck	303 Butler Street
6	Cultural Arts	Saugatuck	Saugatuck-Douglas Art Club	P O Box 176
1	Land - Bowling	Douglas	Alley's Bowling Alley	229 Center Street
1	Land - Fitness	Saugatuck	Blue Star Community Gym	6492 Blue Star Highway
1	Land - Bikes and Sand	Douglas	Just Add Water Bicycle Rentals	450 Center Street
2	Land - Bikes and Sand	Saugatuck	Saugatuck Dune Rides	6495 Blue Star Highway
3	Land - Bikes and Sand	Saugatuck	Saugatuck Hydrobikes	Saugatuck Hydrobikes
4	Land - Bicycle Rental	Saugatuck	Big Lake Outfitters of Saugatuck	640 Water Street
1	Golf Courses	Saugatuck	Ravines Golf Club Golf Course	3520 Palmer Drive
2	Golf Courses	Saugatuck	Laketown Golf Course	6069 Blue Star Highway
3	Golf Courses	Saugatuck	Clearbrook Golf Club	6494 Clearbrook Drive
1	Meeting Space	Douglas	Saugatuck/Douglas Public Library	137 Center Street
2	Meeting Space	Douglas	Douglas DDA and Village Offices	86 W Center Street
1	Meeting Space	Saugatuck	Ravines Reception Facility	3520 Palmer Drive
2	Meeting Space	Saugatuck	Butler Meeting Room	40 Butler Street
3	Meeting Space	Saugatuck	Saugatuck Ctr For The Arts - Meetings	400 Culver Street
4	Meeting Space	Saugatuck	Maplewood Hotel Meeting Space	428 Butler Street
5	Meeting Space	Saugatuck	Laketown Conference Center	6069 Blue Star Highway
6	Meeting Space	Saugatuck	A Cut Above Event Center	6080 Blue Star Highway
1	Parks	Douglas	Douglas Beach	3099 Lakeshore Drive
2	Parks	Douglas	Wade's Landing	.
1	Parks	Saugatuck	Mount Baldhead	.
2	Parks	Saugatuck	Coghlin Park	Culver Street
3	Parks	Saugatuck	Cook Park	Culver Street
4	Parks	Saugatuck	Oval Beach	Perryman Street
5	Parks	Saugatuck	Wicks Park	Water Street
6	Parks	Saugatuck	CMC Sculpture Gardens	1000 Mason Street
1	Vineyard, Orchard	Douglas/Saugatuck	Fenn Valley - Vineyards	2337 63rd Street
2	Vineyard, Orchard	Douglas/Saugatuck	Crane's Pie Pantry - Winery & Orchard	6054 124th Avenue

Sources: Dun & Bradstreets, www.Saugatuck.com, and field observations by LandUseUSA | Urban Strategies, 2019.

Inventory of Retail, Merchants, and Shopping Choices

The Cities of Douglas, Fennville, and Sautgatuck | 2019

1	Lumber	Douglas	Overisel Lumber Company	2894 Blue Star Highway
1	Hardware	Fennville	Dickinson True Value	111 E Main Street
1	Auto	Saugatuck	Napa Auto Parts, Ihle Auto Svc & Sales	6525 Blue Star Highway
1	Dollar Stores	Saugatuck	Dollar Store	3465 Blue Star Highway
1	Electronics	Saugatuck	Big Blue Water computer repair	3481-B Blue Star Highway
.	Sporting Goods	Douglas	Saugatuck/Douglas Public Library	137 Center Street
1	Sporting Goods	Saugatuck	Teeny Tiny Toy Store	135 Hoffman
2	Sporting Goods	Saugatuck	Singapore Bank Bookstore	317 Butler Street
1	Sporting Goods	Douglas	Tower Marine - Parts, Supplies	216 St Peters Dr
2	Sporting Goods	Douglas	Tower Marine - Power Sports	216 St Peters Dr
3	Sporting Goods	Douglas	Just Add Water	450 Center Street
1	Sporting Goods	Saugatuck	Lakeshore Tackle, Fishing, Firearms	6398 Blue Star Highway
1	Furniture	Douglas	Brackett & Co Furniture Store	34 Center St
2	Furniture	Douglas	Douglas Home Furnishings	150 E Center St
3	Furniture	Douglas	K West Cabinet Store	150 W Center St
4	Furniture	Douglas	Kim Neuens Design & Interiors	25 Center Street
1	Antiques	Douglas	Saugatuck + Blue Star Antique Pavilions	2948 Blue Star Highway
2	Antiques	Douglas	Douglas Antique Market (seasonal)	at the park
1	Antiques	Fennville	Featherstone Antique Mall	221 E. Main Street
2	Antiques	Fennville	Birdcage Antiques	M-89 & Blue Star Hwy
1	Antiques	Saugatuck	Swell Times	421 Water St
1	Apparel	Saugatuck	Big Monkey T-Shirts	103 Butler Steet
2	Apparel	Saugatuck	For The Love of Shoes, LLC	119 Butler Street
3	Apparel	Saugatuck	Images - women's clothing	140 Butler St # A
4	Apparel	Saugatuck	Saugatuck Traders - men's apparel	214 Butler Street
5	Apparel	Saugatuck	Glik's	234 Butler Street
6	Apparel	Saugatuck	Sinbad apparel accessories	237 Butler St
7	Apparel	Saugatuck	Fat Cats apparel	246 Butler St
8	Apparel	Saugatuck	Lovella Fashion Apparel LLC	246 Culver Street
9	Apparel	Saugatuck	Landsharks	306 Butler Street
10	Apparel	Saugatuck	Grins of Saugatuck	326 Butler Street
11	Apparel	Saugatuck	Camp Willow clothing	546 Butler Street
12	Apparel	Saugatuck	T Shirt Shoppe	107 Butler Street
13	Apparel	Saugatuck	Motif LLC	242 Butler Street

Sources: Dun & Bradstreets, www.Saugatuck.com, and field observations by LandUseUSA | Urban Strategies, 2019.

Inventory prepared on behalf of the City of Douglas, may include some minor imperfections.

Inventory of Gift and Novelty Stores

The Cities of Douglas, Fennville, and Sautgatuck | 2019

1	Gifts, Novelty	Douglas	Thistle Gallery	10 W. Center Street
2	Gifts, Novelty	Douglas	J. Petter Galleries	161 N. Blue Star Highway
3	Gifts, Novelty	Douglas	Palette	18 E Center Street
4	Gifts, Novelty	Douglas	Mixed Media Gallery (Thomas John)	23 Center Street
5	Gifts, Novelty	Douglas	LebenArt Gallery	23 E Center St
6	Gifts, Novelty	Douglas	Saugatuck Brewing Co - Retail Room	2948 Blue Star Highway,
7	Gifts, Novelty	Douglas	Button Gallery	33 Center Street
8	Gifts, Novelty	Douglas	Articles Boutique	36 E Center Street
9	Gifts, Novelty	Douglas	Water Street Gallery	98 Center Street
10	Gifts, Novelty	Douglas	Endora Bohemian	Center Street
1	Gifts, Novelty	Fennville	Fernwood 1891	120 E Main St
2	Gifts, Novelty	Fennville	Aspen Glenn Studio	1355 Wildflower Ln
3	Gifts, Novelty	Fennville	Blue Star Studio of Wood & Glass	1684 Adams Rd
4	Gifts, Novelty	Fennville	Art Du Jour	2748 66th Street
5	Gifts, Novelty	Fennville	Summerhouse Lavender Farm	2975 65th Street
6	Gifts, Novelty	Fennville	Dawn Stafford's Peachbelt Studio Gallery	6292 124th Ave.
7	Gifts, Novelty	Fennville	Blue Coast Artists	6322 113th Avenue
8	Gifts, Novelty	Fennville	Khnemu Studio on Fernwood Farm	6322 113th Avenue
1	Gifts, Novelty	Saugatuck	Kindel & Company Lifestyle Mercantile	241 Culver Street
2	Gifts, Novelty	Saugatuck	CMC Design Studio	1000 Mason Street
3	Gifts, Novelty	Saugatuck	Koorey Creations - jewelry	104 Hoffman Street
4	Gifts, Novelty	Saugatuck	Good Goods	106 Mason Street
5	Gifts, Novelty	Saugatuck	Newbs LLC - jewelry store	110 Butler St
6	Gifts, Novelty	Saugatuck	Saugatuck Art Traders, LLC	129 Griffin Street, #106
7	Gifts, Novelty	Saugatuck	Bauble Bath Ltd.	132 Butler Street
8	Gifts, Novelty	Saugatuck	Alle Rue No. 133	133 Butler Street
9	Gifts, Novelty	Saugatuck	Alle Rue No. 133 gift shop	133 Butler Street
10	Gifts, Novelty	Saugatuck	Pink Patio	133 Mason Street
11	Gifts, Novelty	Saugatuck	Brass Anchor Co.	134 Butler Street
12	Gifts, Novelty	Saugatuck	Art Glass Alcove	142 Butler Street
13	Gifts, Novelty	Saugatuck	Art & Angels (L V L Inc)	226 Butler Street
14	Gifts, Novelty	Saugatuck	Bright World Candle Co	233 Culver St
15	Gifts, Novelty	Saugatuck	James Brandess Studios & Gallery	238 Butler Street
16	Gifts, Novelty	Saugatuck	Amazwi Contemporary Art	249 Culver Street
17	Gifts, Novelty	Saugatuck	Tucks Christmas Shop	252 Butler St
18	Gifts, Novelty	Saugatuck	Saugatuck Gallery (Margaret Lipe)	317 Butler Street
19	Gifts, Novelty	Saugatuck	It Is What It Is	318 Butler Street
20	Gifts, Novelty	Saugatuck	Amaru Leather	322 Griffith Street
21	Gifts, Novelty	Saugatuck	Santa Fe Trading Co.	325 Butler Street
22	Gifts, Novelty	Saugatuck	Roan & Black art furnishings gifts	3315 Blue Star Highway
23	Gifts, Novelty	Saugatuck	Armstrong DeGraaf Int'l Fine Art Galleries	403 Water Street
24	Gifts, Novelty	Saugatuck	Lucia's World Emporium	421 water Street
25	Gifts, Novelty	Saugatuck	James Conner Gallery	800 Lake St

Inventory of Grocery, Pharmacy, and Liquor Stores The Cities of Douglas, Fennville, and Sautgatuck | 2019

1	Grocery	Douglas	Farmhouse Pantry	100 Blue Star Highway
2	Grocery	Douglas	Lake Vista Supervalu	237 Center Street
3	Grocery	Douglas	Palazzolo's Outdoor Market (seasonal)	141 Blue Star Highway
1	Grocery	Fennville	Wagoner's - Fennville Main St Market	125 E Main St
1	Grocery	Saugatuck	Saugatuck Spice Merchants LLC	231 Butler St
2	Grocery	Saugatuck	American Spoon Foods	308 Butler Street
3	Grocery	Saugatuck	Olive Mill	314 Butler Street
4	Grocery	Saugatuck	Bulter Pantry (Jerome Usher)	439 Butler Street
5	Grocery	Saugatuck	River Market (Groceries Deli)	650 Water Street
1	Florist	Douglas	VS Flowers	2914 Blue Star Highway
2	Florist	Saugatuck	Back To The Fuchsia	439 Butler Street, #4
3	Florist	Saugatuck	Saugatuck Flowers	118 Hoffman St
1	Pharmacy	Saugatuck	Saugatuck Drug/Village Store	201 Butler St
1	Garden Nursery	Fennville	Huntree Nursery	2346 Blue Star Highway
2	Garden Nursery	Fennville	T & S Enterprises Landscape	6481 Wiley Rd
3	Garden Nursery	Saugatuck	Rosebay Nursery Wholesale	6394 Old Allegan Rd
4	Garden Nursery	Saugatuck	New Life Nursery Wholesale	3720 64th St
1	Liquor	Douglas	Lakeshore Convenience	155 Blue Star Highway
1	Liquor	Saugatuck	Wine Sellers of Saugatuck	247 Butler Street
2	Liquor	Saugatuck	River Market (Groceries Beer Wine Deli)	650 Water Street

Sources: Dun & Bradstreets, www.Saugatuck.com, and field observations by LandUseUSA | Urban Strategies, 2019.
Inventory prepared on behalf of the City of Douglas, may include some minor imperfections.

Inventory of Restaurant Establishments - Conventional Eateries

The Cities of Douglas, Fennville, and Sautgatuck | 2019

1	café, coffee	Douglas	Everyday People Cafe	11 Center Street
2	café, coffee	Douglas	Blue Star Cafe	141 Blue Star Highway
3	café, coffee	Douglas	Respite Cappuccino Court	48 Center Street
1	café, coffee	Fennville	Root Cafe	102 E. Main Street
2	café, coffee	Fennville	PK's Lighthouse Cafe	1898 68th Street
1	café, coffee	Saugatuck	Uncommon Coffee Roasters	127 Hoffman Street
2	café, coffee	Saugatuck	Fresh Basil Cafe	313 Water Street
3	café, coffee	Saugatuck	Pennyroyal Cafe & Provisions	3319 Blue Star Highway
4	café, coffee	Saugatuck	Saugatuck Tea Company	360 Water St
1	sweets	Douglas	Palazzolo's / Blue Star Dairy	141 Blue Star Highway
1	sweets	Fennville	Crane's Pie Pantry	6054 124th Avenue
1	sweets	Saugatuck	Notties Frozen Yogurt	109 Butler St
2	sweets	Saugatuck	Charlie's Round Corner Ice Cream	132 Mason St
3	sweets	Saugatuck	Kilwin's Chocolates	152 Butler St
4	sweets	Saugatuck	Boardwalk Ice Cream	311 Water Street
1	catering	Douglas	Shanahan Catering Co (Farmhouse)	333 Blue Star Highway
1	Pizza, Italian	Douglas	Pizza Mambo	10 Blue Star Highway
2	Pizza, Italian	Douglas	Lakeshore Pizza take out	155 Blue Star Highway
3	Pizza, Italian	Douglas	Back Alley Pizza Joint	22 Main Street
4	Pizza, Italian	Saugatuck	Marro's Italian Restaurant	147 Water St
5	Pizza, Italian	Saugatuck	Scooter's Cafe and Pizzeria	322-a Culver Street
1	Restaurant	Douglas	Farmhouse Deli Sandwiches	100 Blue Star Highway
2	Restaurant	Douglas	Vicki's Diner	114 Blue Star Highway
3	Restaurant	Douglas	WayPoint Restaurant	155 Blue Star Highway
4	Restaurant	Douglas	Alley's Classic American Diner	229 Center Street
1	Restaurant	Fennville	Salt of the Earth	114 East Main Street
2	Restaurant	Fennville	Crane's Restaurant	6054 124th Avenue
1	Restaurant	Saugatuck	Pumpernickels	202 Butler Street
2	Restaurant	Saugatuck	Coral Gables Restaurant	220 Water Street
3	Restaurant	Saugatuck	Bowdies Chophouse	230 Culver Street
4	Restaurant	Saugatuck	GROW - A Saugatuck Diner	302 Culver Street
5	Restaurant	Saugatuck	Boardwalk Deli Sandwiches	311 Water Street
6	Restaurant	Saugatuck	Ravines Golf Club - the Restaurant	3520 Palmer Drive
7	Restaurant	Saugatuck	Belvedere Inn - the Restaurant	3656 63rd Street
8	Restaurant	Saugatuck	Butler Restaurant	40 Butler Street
9	Restaurant	Saugatuck	Ida Red's Cottage	645 Water St
10	Restaurant - Asian	Douglas	Thai House and Sushi Boat Restaurant	312 Ferry St
11	Restaurant - Fusion	Saugatuck	Black Walnut Restaurant & Bar - fusion	129 Griffith Street
12	Restaurant - Southern	Saugatuck	Southerner	880 Holland St
13	Hispanic Cuisine	Saugatuck	El Burrito Feliz / Loco Burrito	322-b Culver Street

Inventory of Restaurant Establishments - Bars, Pubs, Brews and Grills The Cities of Douglas, Fennville, and Saugatuck | 2019

1	wine, brew, and grill	Douglas	J. Petter Wine Gallery	161 N Blue Star Highway
2	wine, brew, and grill	Douglas	Red Dock Café - a Bar and Grill	219 N Union St
3	wine, brew, and grill	Douglas	Borrowed Time Wine Bar	22 E. Center Street
4	wine, brew, and grill	Douglas	Wild Dog Grille	24 E Center St
5	wine, brew, and grill	Douglas	Christo's Bar & Grill	2935 Blue Star Highway
6	wine, brew, and grill	Douglas	J. Paul's Restaurant & Wine Bar @ Kirby	294 W Center St
7	wine, brew, and grill	Douglas	Saugatuck Brewing Company	2948 Blue Star Highway
8	wine, brew, and grill	Douglas	The Cove bar	41 Blue Star Highway
1	wine, brew, and grill	Fennville	Waypost Brewing Co.	1630 Blue Star Highway
2	wine, brew, and grill	Fennville	Virtue Cider	2170 62nd Street
1	wine, brew, and grill	Saugatuck	Wally's brew and grub	128 Hoffman St
2	wine, brew, and grill	Saugatuck	Sand Bar Saloon	141 Butler Street
3	wine, brew, and grill	Saugatuck	Lucy's Sauggy Dollar Bar / Little Kitchen	149 Griffith Street
4	wine, brew, and grill	Saugatuck	Phil's Bar & Grille	215 Butler Street
5	wine, brew, and grill	Saugatuck	Coast 236 / Hercules Restaurant & Bar	236 Culver St
6	wine, brew, and grill	Saugatuck	Mitten Brewing Company	329 Water Street
7	wine, brew, and grill	Saugatuck	Mermaid Waterfront Bar and Grill	340 Water Street
8	wine, brew, and grill	Saugatuck	Guardian Brewing Company	3657 63rd Street
9	wine, brew, and grill	Saugatuck	Wicks Park Bar & Grille	449 Water Street
10	wine, brew, and grill	Saugatuck	The BARge bar	528 Water St
11	wine, brew, and grill	Saugatuck	Spectator Sports Bar & Grill	6432 Blue Star Highway
12	wine, brew, and grill	Saugatuck	Grill Room at Clearbrook	6494 Clearbrook Dr.
13	wine, brew, and grill	Saugatuck	Coppercraft Distillery Tasting Room	340 Water Street
14	wine, brew, and grill	Saugatuck	Fenn Valley Winery - Tasting Room	310 Butler Street

Sources: Dun & Bradstreets, www.Saugatuck.com, and field observations by LandUseUSA | Urban Strategies, 2019.
Inventory prepared on behalf of the City of Douglas, may include some minor imperfections.

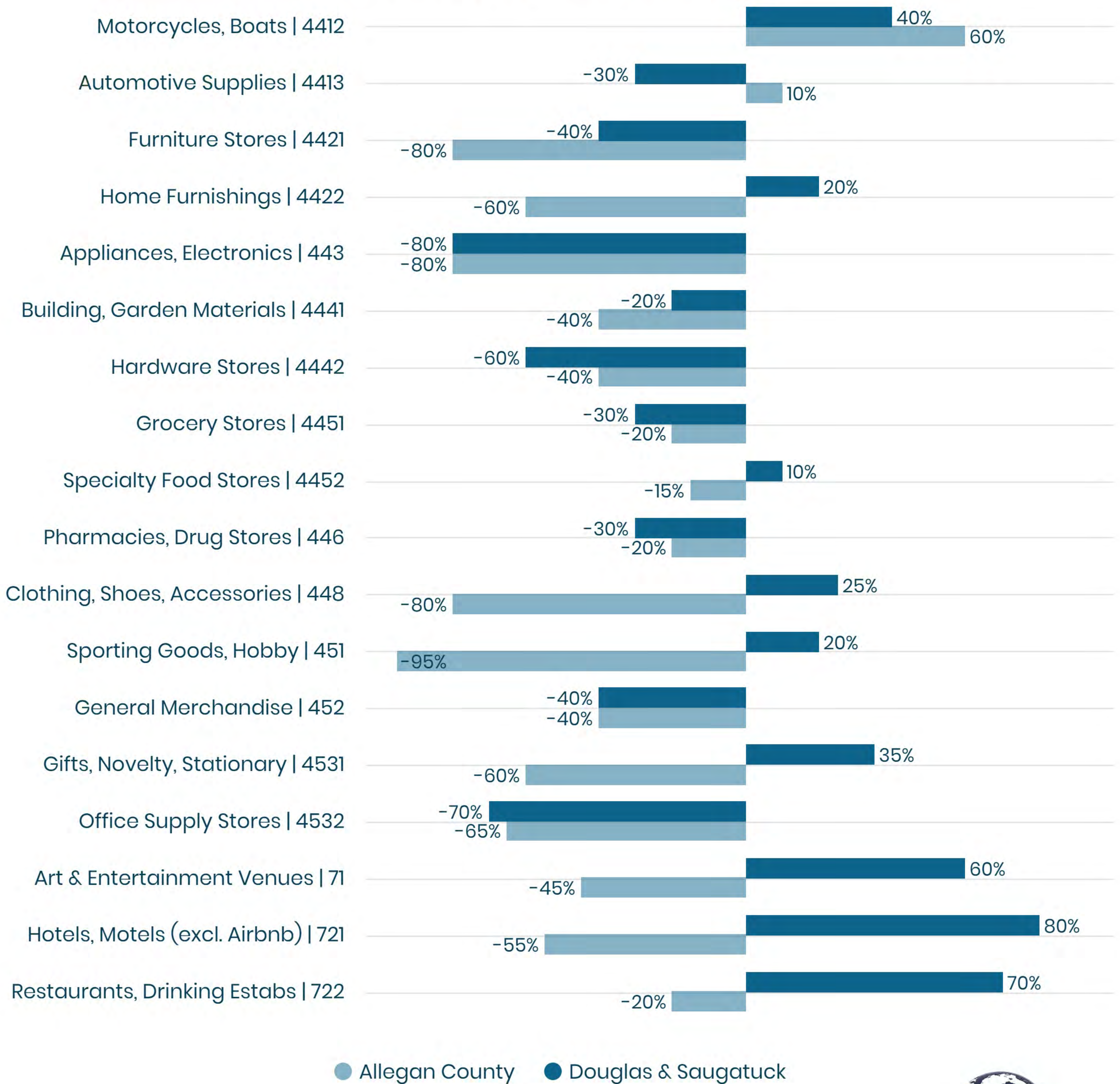
section **C**

Market Share Analysis

Net Leakage | Douglas & Saugatuck

Based on transacted sales compared to resident expenditure potential.

Annual Net Import and Export Summary by Retail Category

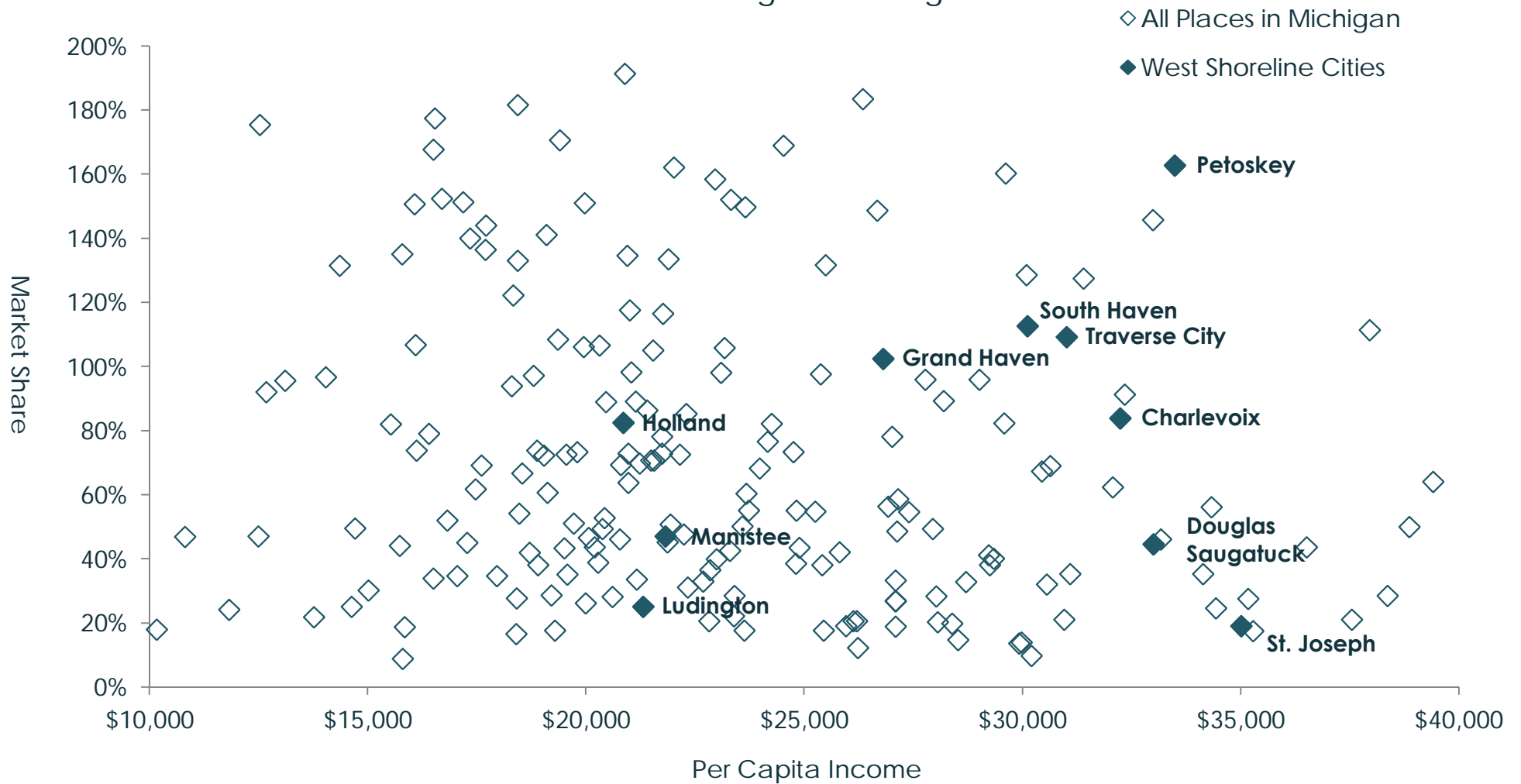


Underlying data provided by the Economic Census though 2012, and county business patterns through 2016, with analysis and forecasts by LandUseUSA | Urban Strategies on behalf of the City of Douglas, 2019.



LandUseUSA
UrbanStrategies

Market Share v. Per Capita Income Total Retail Trade | NAICS 44-45 Cities and Villages in Michigan



Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies © 2019 with all rights reserved.

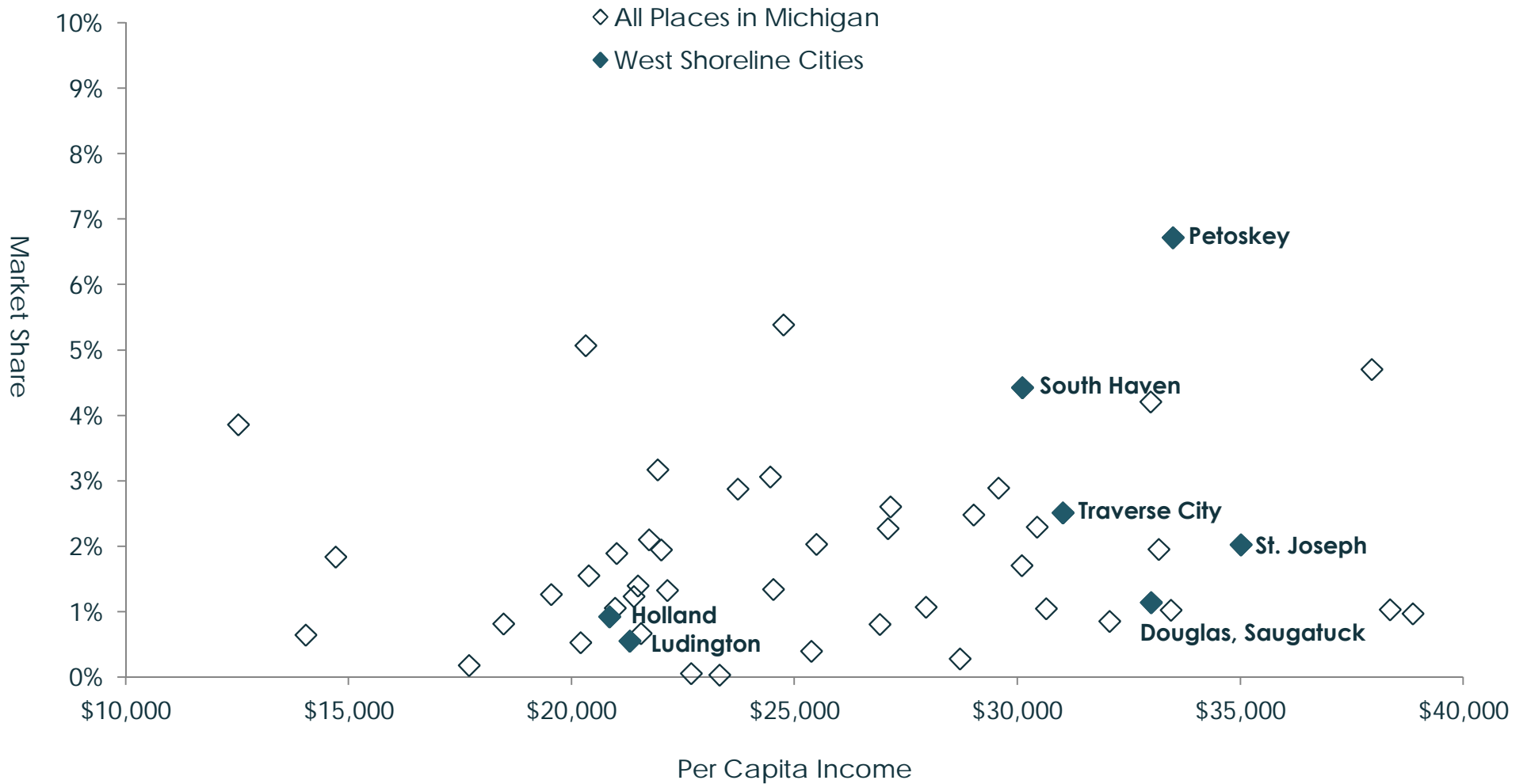
Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.

Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income

Furniture, Home Furnishings | NAICS 442

Cities and Villages in Michigan



Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies © 2019 with all rights reserved.

Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.

Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income

Building and Garden Materials, Supplies | NAICS 444

Cities and Villages in Michigan

◇ All Places in Michigan

◆ West Shoreline Cities

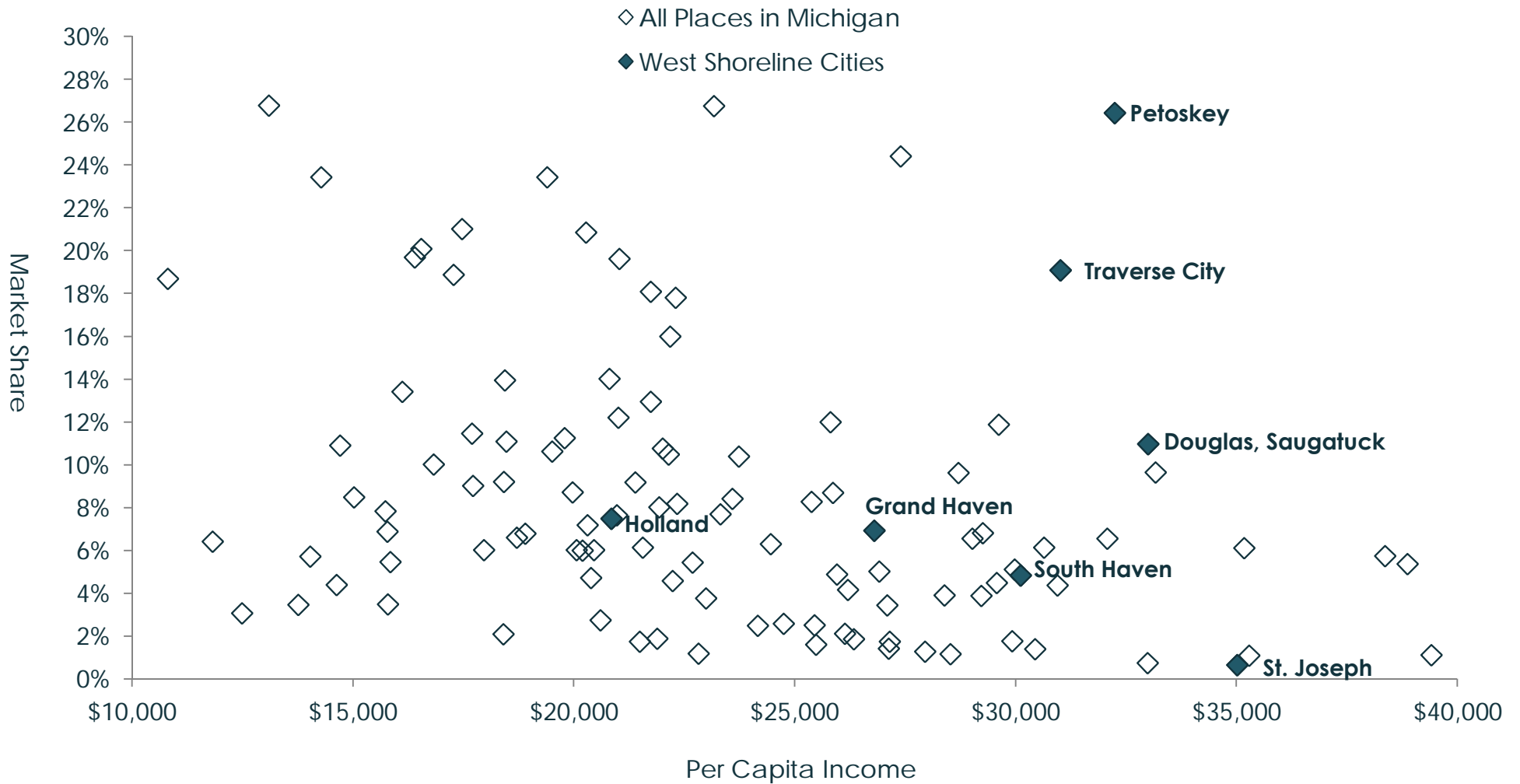


Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies © 2019 with all rights reserved.

Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.

Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income Food and Beverage Stores | NAICS 445 Cities and Villages in Michigan

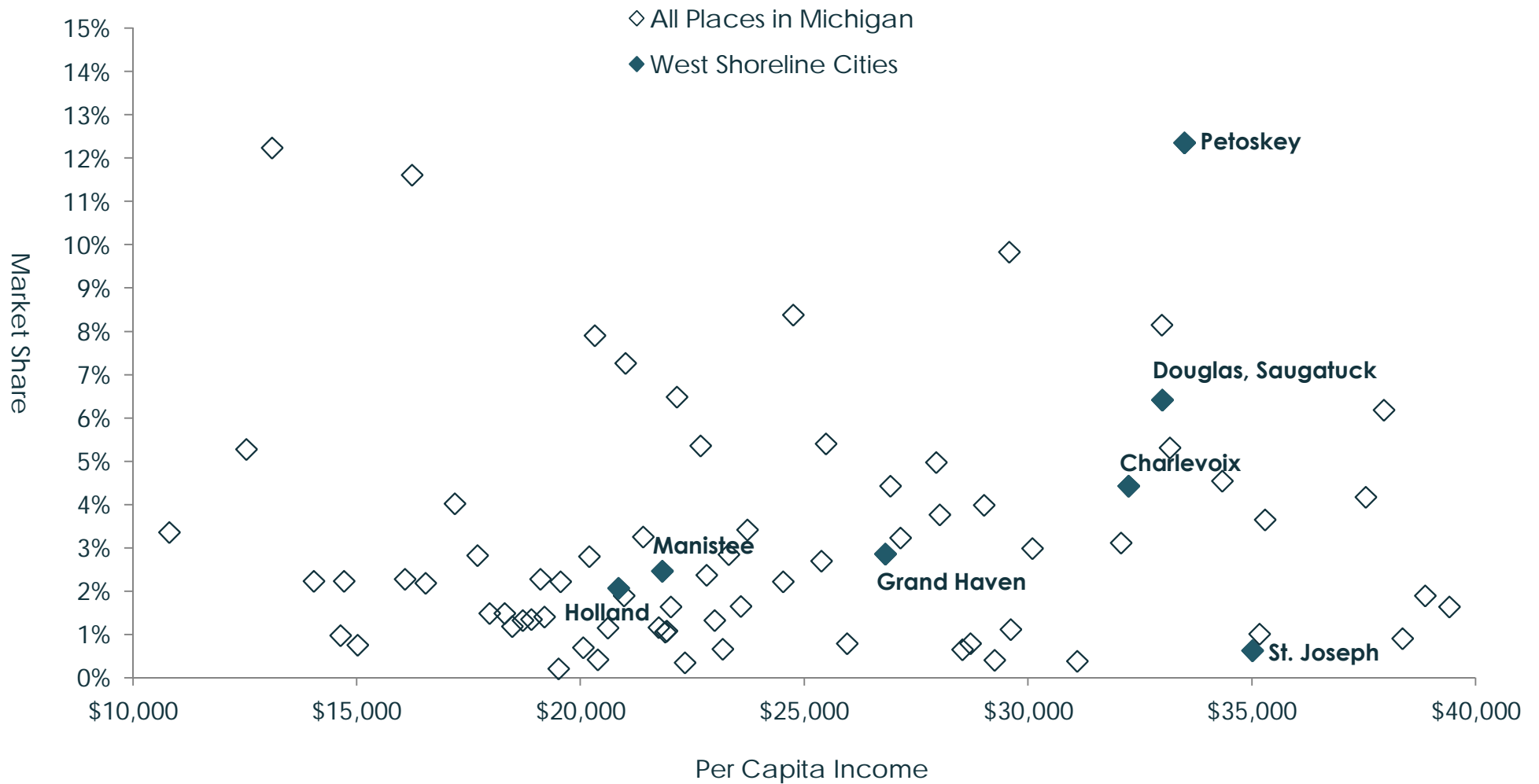


Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies © 2019 with all rights reserved.

Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.

Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income Clothing, Accessories Stores | NAICS 448 Cities and Villages in Michigan

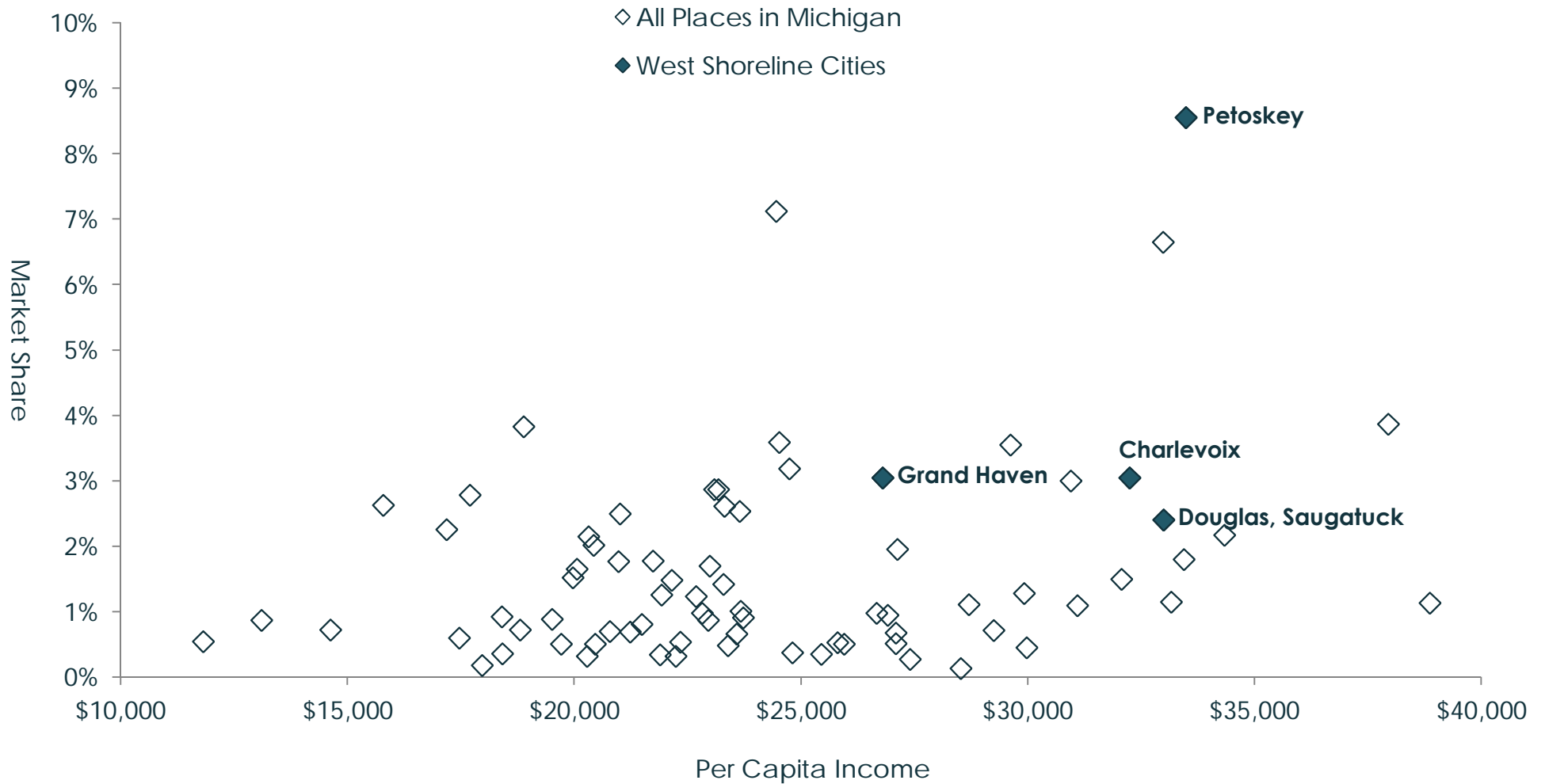


Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies © 2019 with all rights reserved.

Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.

Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income
Gifts, Art, Novelty, Office Supplies, Pets, Floral | NAICS 453
Cities and Villages in Michigan

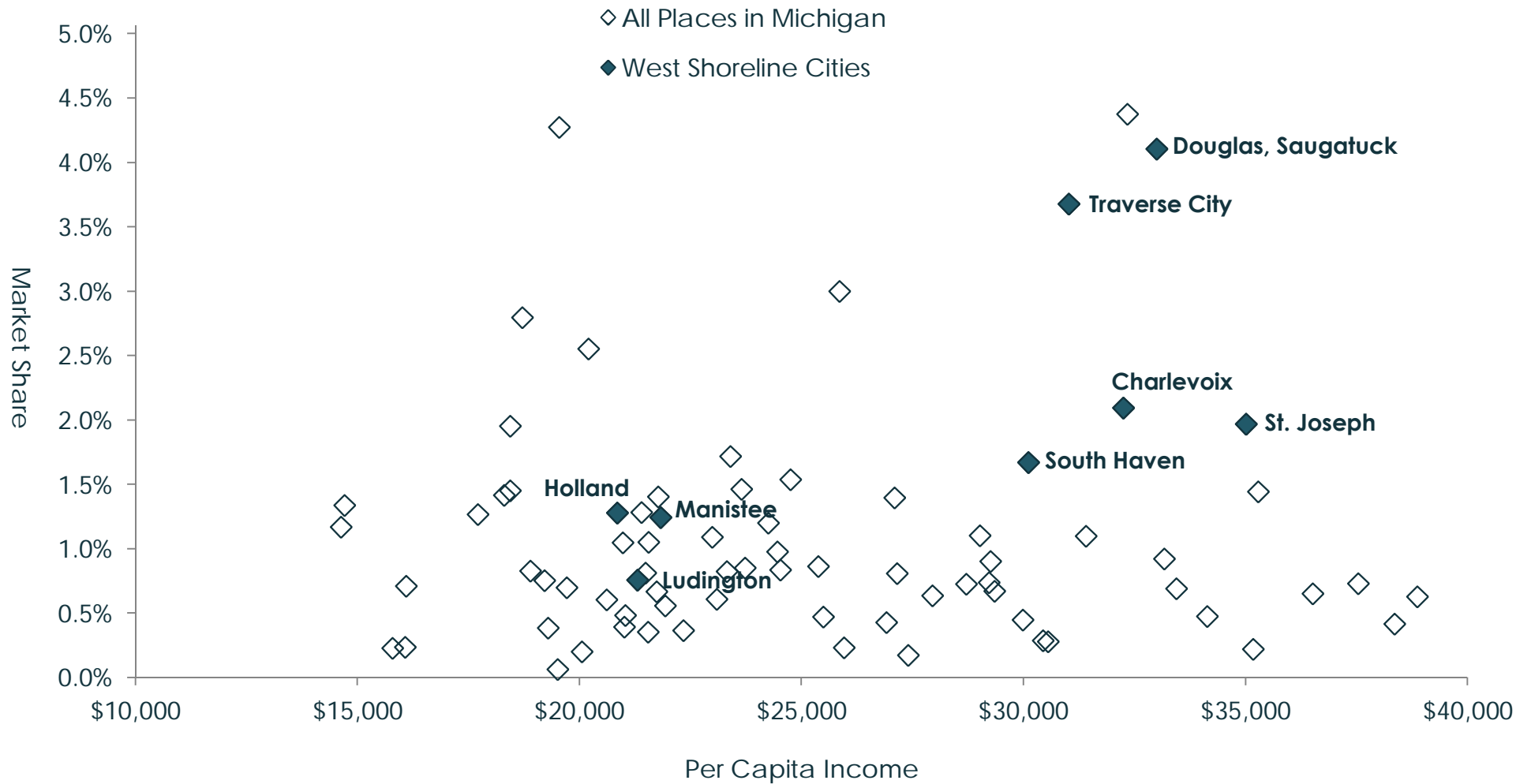


Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies © 2019 with all rights reserved.

Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.

Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income Arts, Entertainment, and Recreation | NAICS 71 Cities and Villages in Michigan

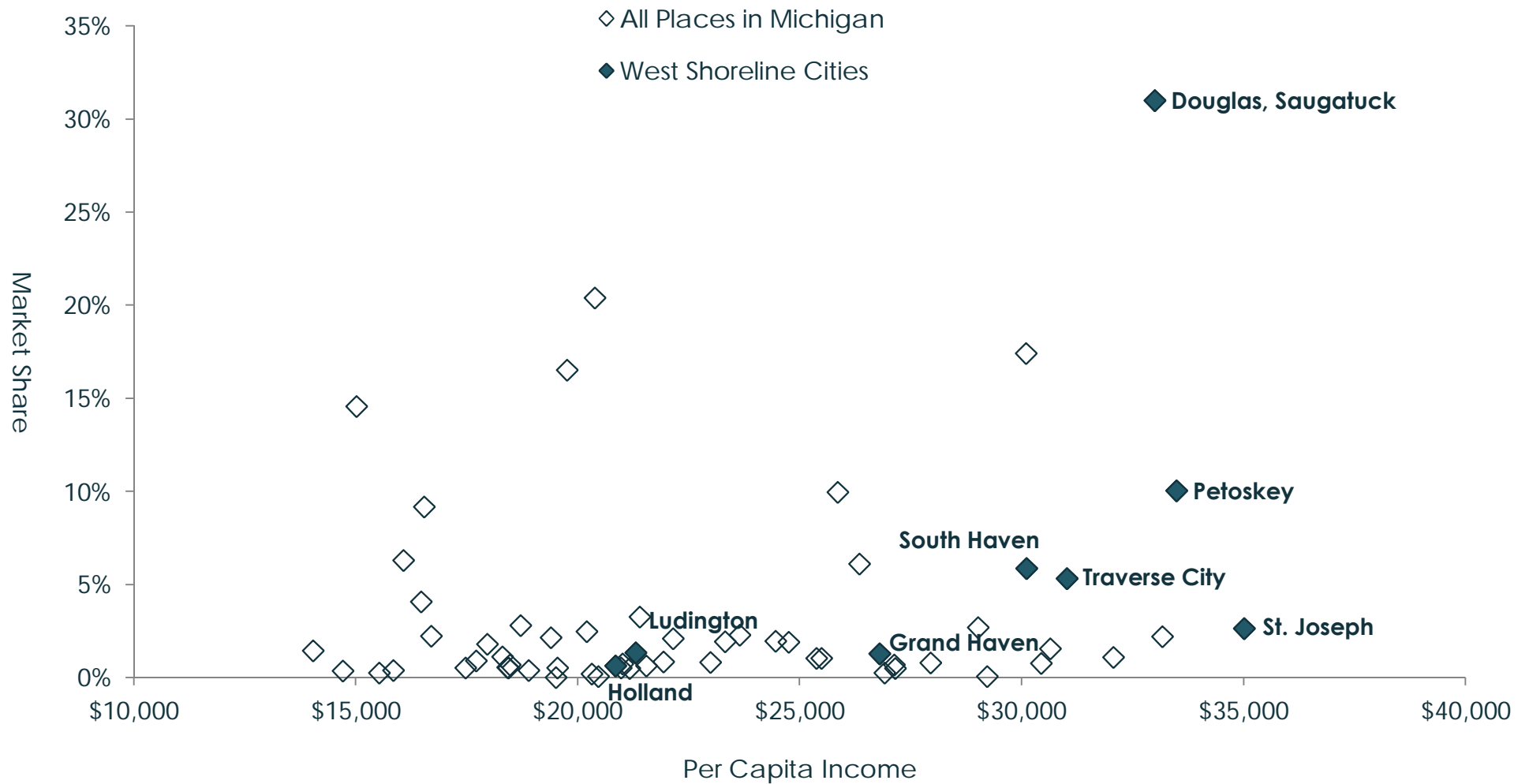


Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies © 2019 with all rights reserved.

Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.

Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income Hotels and Motels, Lodging | NAICS 721 Cities and Villages in Michigan

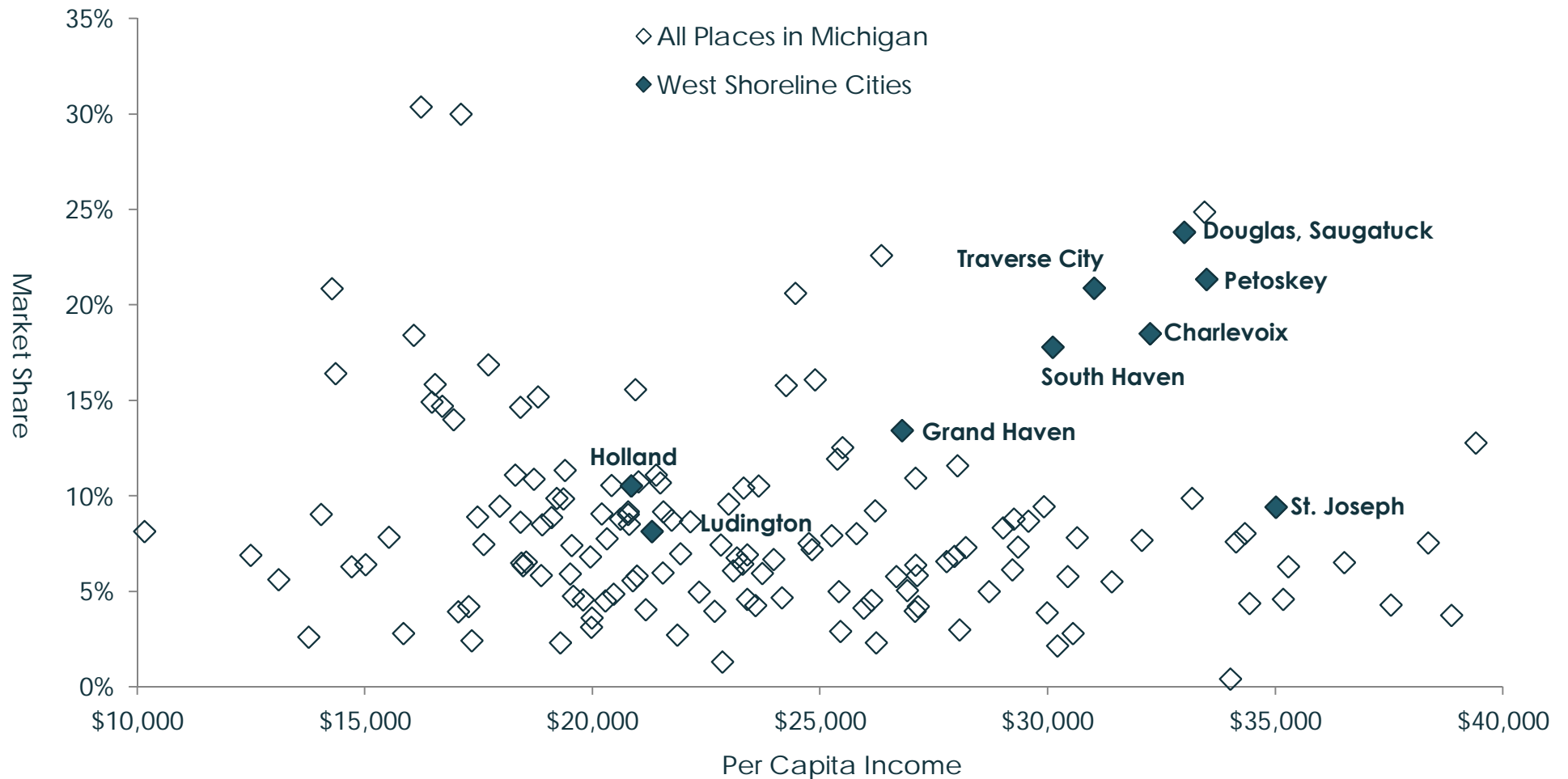


Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies © 2019 with all rights reserved.

Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.

Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

Market Share v. Per Capita Income Restaurants, Drinking Establishments | NAICS 722 Cities and Villages in Michigan



Methodology, analysis, and exhibit prepared by LandUseUSA | Urban Strategies © 2019 with all rights reserved.

Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.

Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2017 (5-yr) American Community Survey.

section **d**

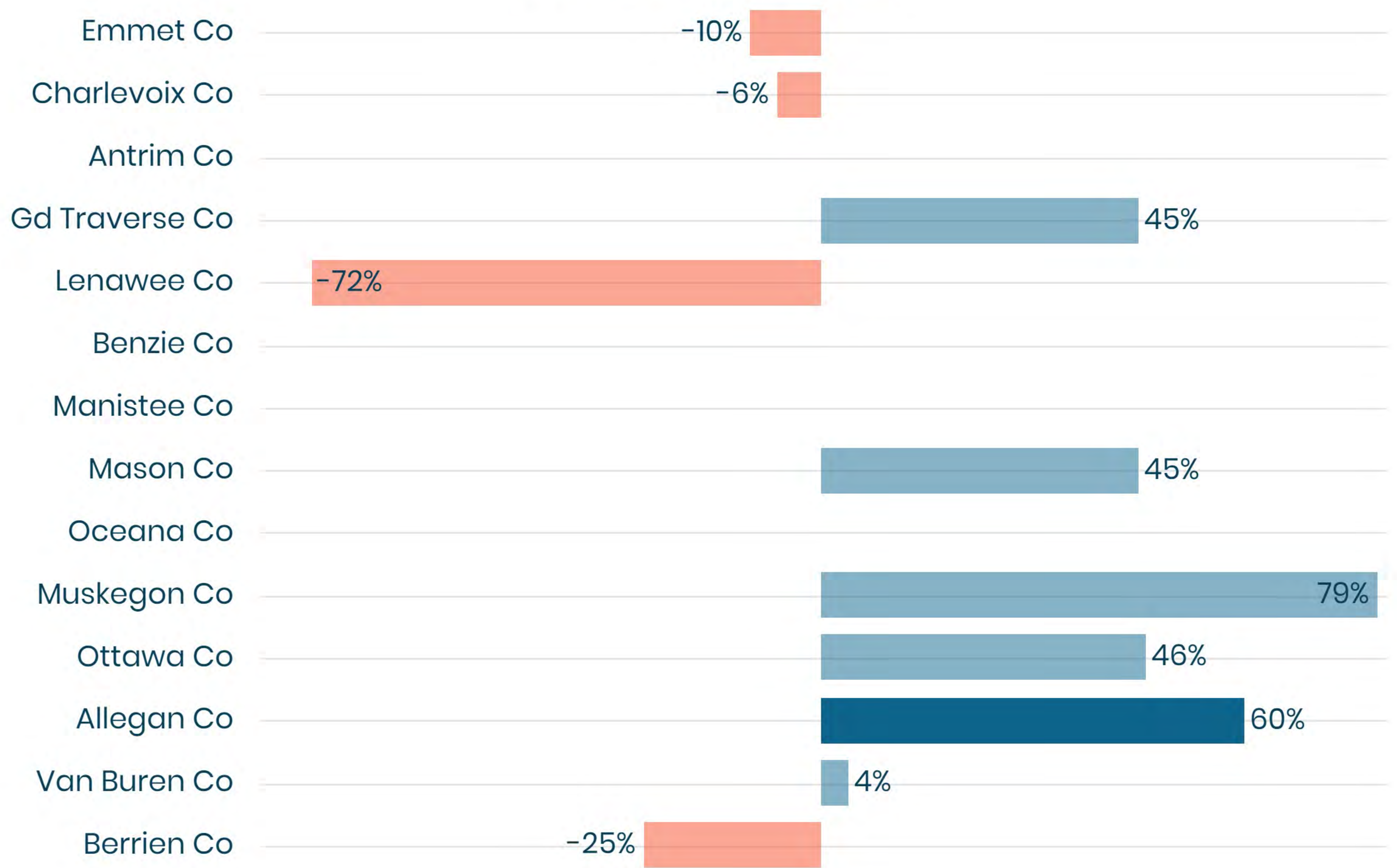
West Shoreline Leakage Analysis

Retail Leakage | West Shoreline Cos.

Based on transacted retail sales compared to resident expenditure potential.

Annual Net Import and Export
West Shoreline Counties | Listed North to South
Motorcycle, Golf Cart, Boat Dealerships

NAICS 4412



Net Export
as a share of
expenditure
potential

Net Import
as a share of
transacted
retail sales

Underlying data provided by the Economic Census though 2012, and county business patterns through 2016, with analysis and forecasts by LandUseUSA | Urban Strategies on behalf of the City of Douglas, 2019.

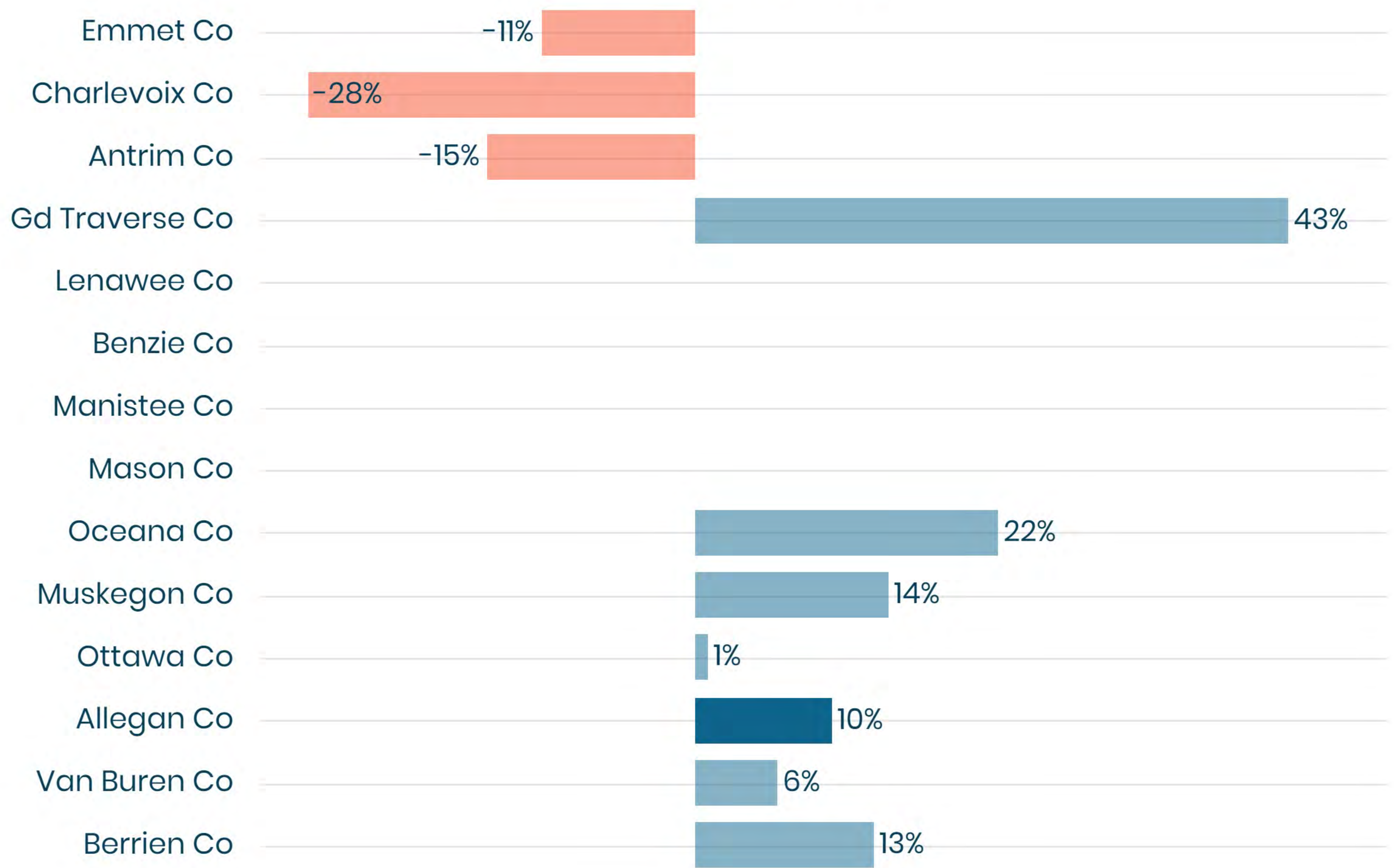


Retail Leakage | West Shoreline Cos.

Based on transacted retail sales compared to resident expenditure potential.

Annual Net Import and Export
West Shoreline Counties | Listed North to South
Automotive Parts and Supply Stores

NAICS 4413



Net Export
as a share of
expenditure
potential

Net Import
as a share of
transacted
retail sales

Underlying data provided by the Economic Census though 2012, and county business patterns through 2016, with analysis and forecasts by LandUseUSA | Urban Strategies on behalf of the City of Douglas, 2019.

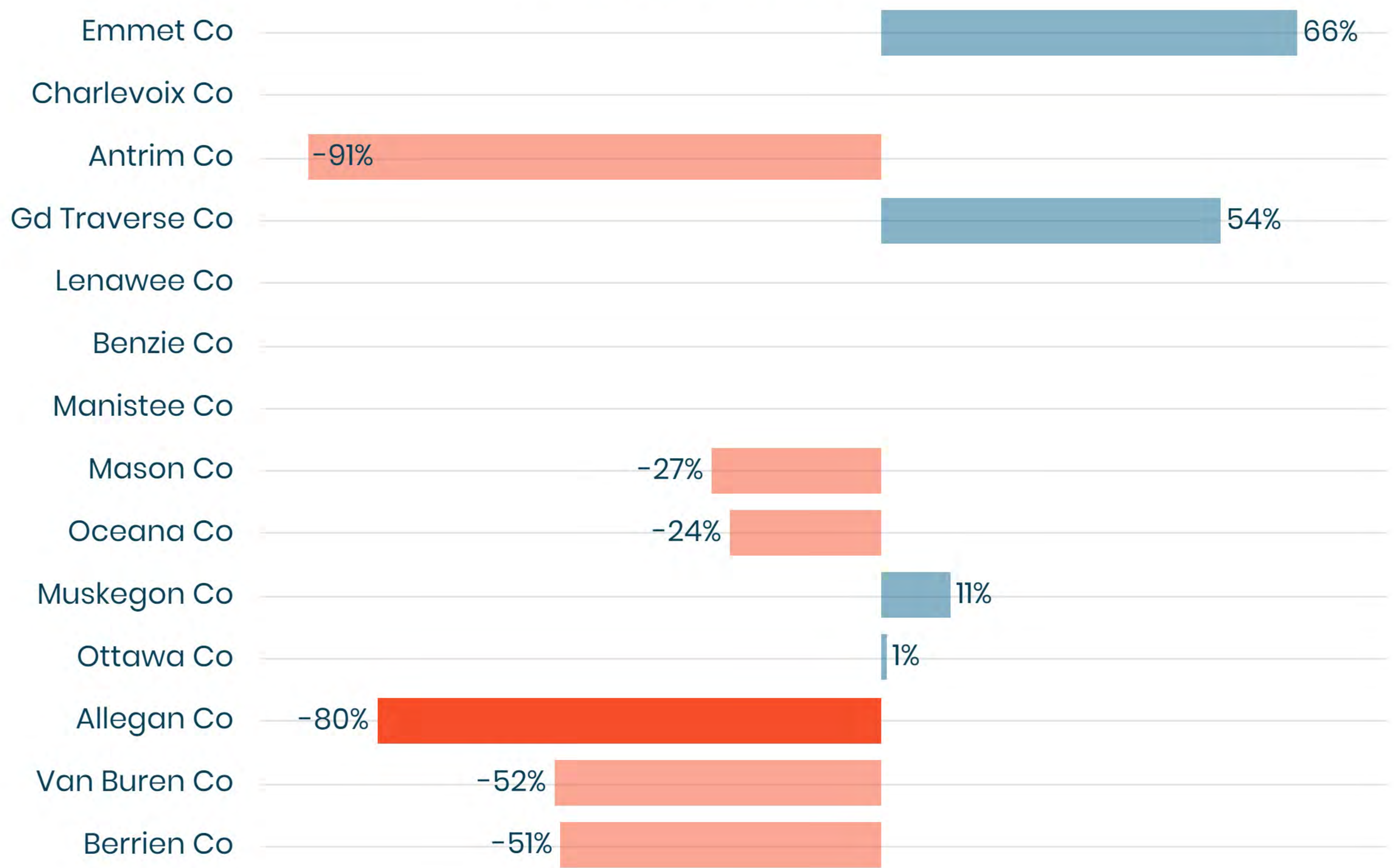


Retail Leakage | West Shoreline Cos.

Based on transacted retail sales compared to resident expenditure potential.

Annual Net Import and Export
West Shoreline Counties | Listed North to South
Furniture and Home Furnishings

NAICS 442



Net Export
as a share of
expenditure
potential

Net Import
as a share of
transacted
retail sales

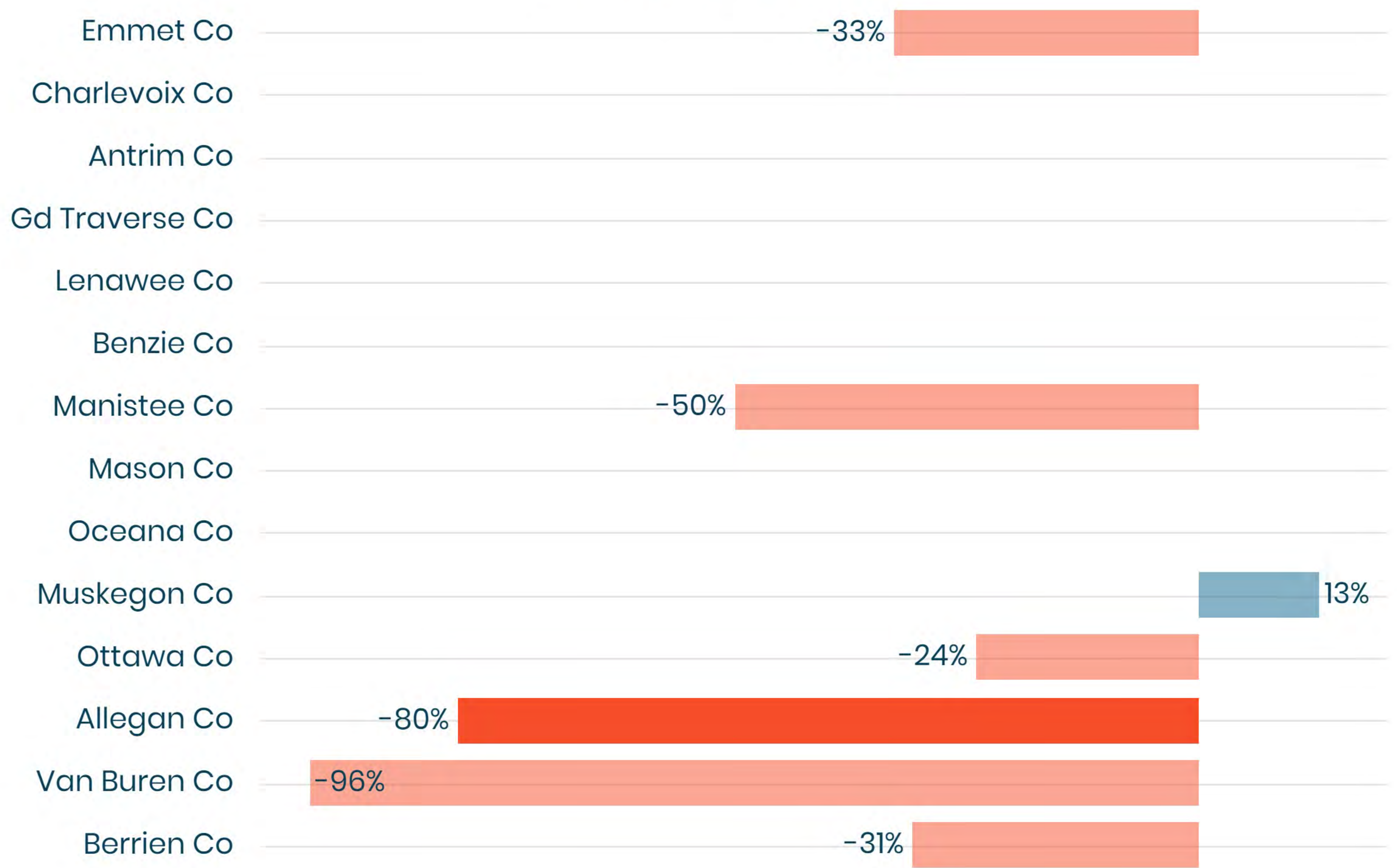
Underlying data provided by the Economic Census though 2012, and county business patterns through 2016, with analysis and forecasts by LandUseUSA | Urban Strategies on behalf of the City of Douglas, 2019.



Retail Leakage | West Shoreline Cos.

Based on transacted retail sales compared to resident expenditure potential.

Annual Net Import and Export
West Shoreline Counties | Listed North to South
Electronics, Appliances, and Computers
NAICS 443



Net Export
as a share of
expenditure
potential

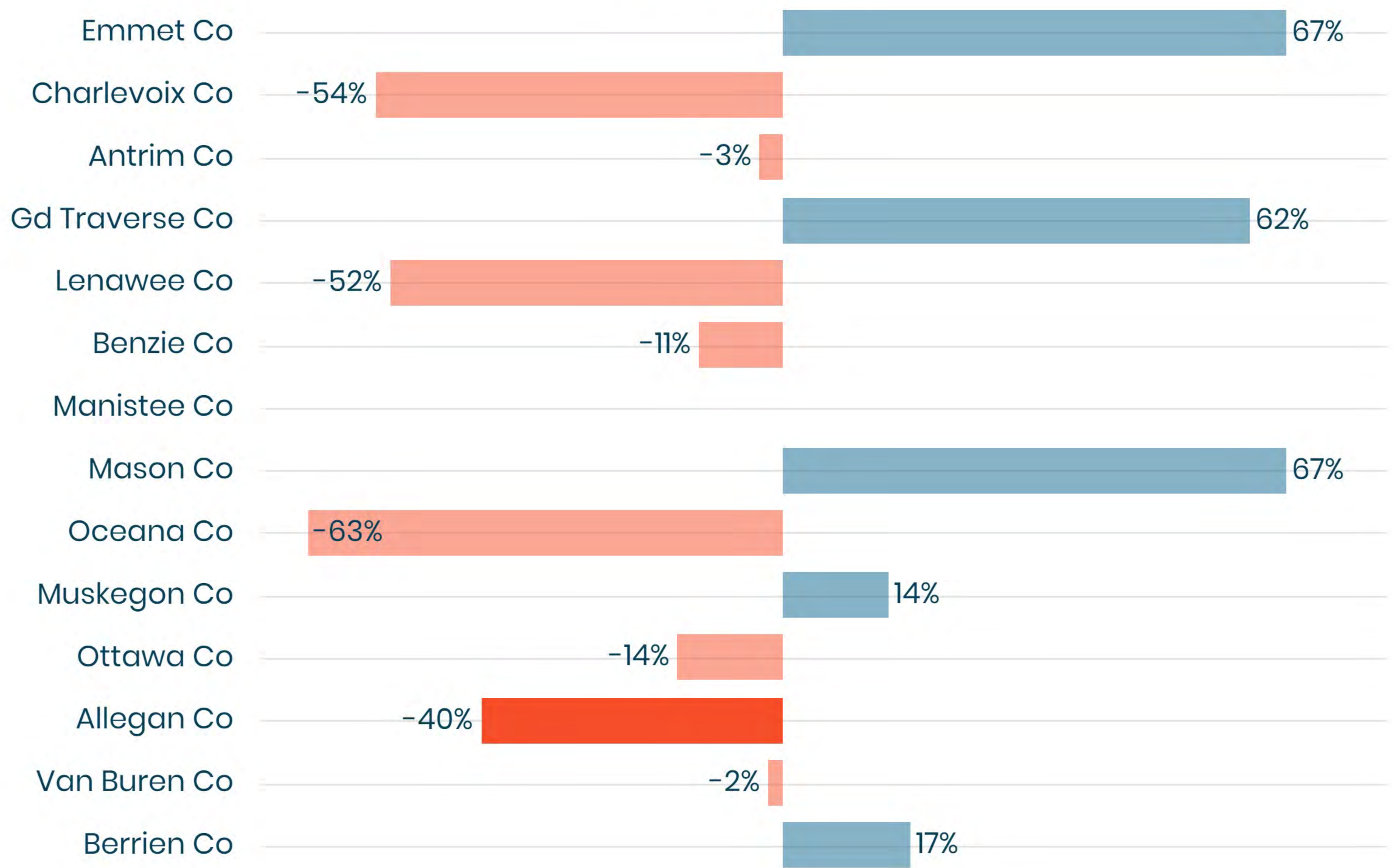
Underlying data provided by the Economic Census though 2012, and county business patterns through 2016, with analysis and forecasts by LandUseUSA | Urban Strategies on behalf of the City of Douglas, 2019.



Retail Leakage | West Shoreline Cos.

Based on transacted retail sales compared to resident expenditure potential.

Annual Net Import and Export
West Shoreline Counties | Listed North to South
Building Materials, Hardware, and Garden Supplies
NAICS 444



Net Export
as a share of
expenditure
potential

Net Import
as a share of
transacted
retail sales

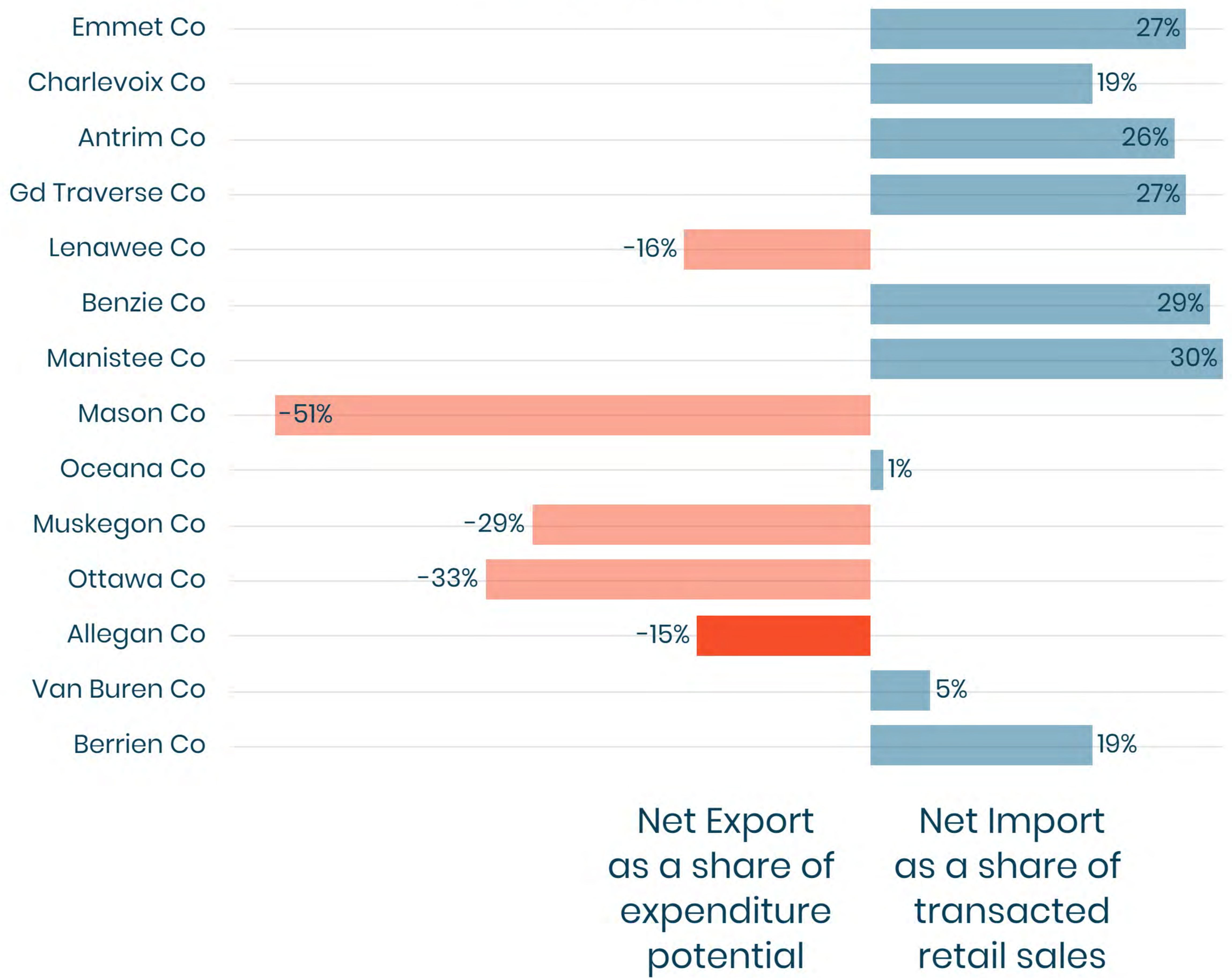
Underlying data provided by the Economic Census though 2012, and county business patterns through 2016, with analysis and forecasts by LandUseUSA | Urban Strategies on behalf of the City of Douglas, 2019.



Retail Leakage | West Shoreline Cos.

Based on transacted retail sales compared to resident expenditure potential.

Annual Net Import and Export
West Shoreline Counties | Listed North to South
Grocery Stores, Food and Beverage Stores
NAICS 445



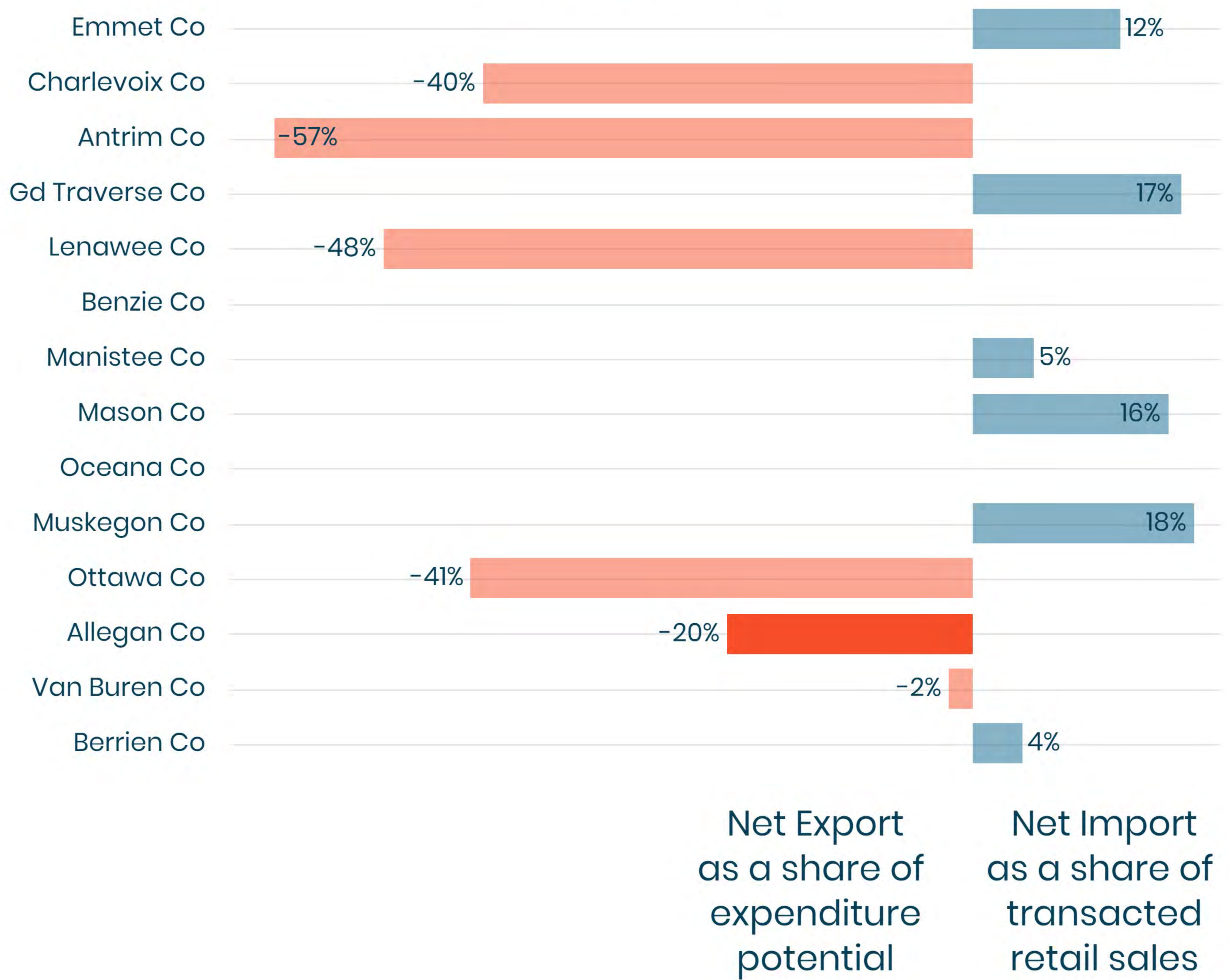
Underlying data provided by the Economic Census though 2012, and county business patterns through 2016, with analysis and forecasts by LandUseUSA | Urban Strategies on behalf of the City of Douglas, 2019.



Retail Leakage | West Shoreline Cos.

Based on transacted retail sales compared to resident expenditure potential.

Annual Net Import and Export
West Shoreline Counties | Listed North to South
Pharmacies, Drug Stores, Personal Care Stores
NAICS 446



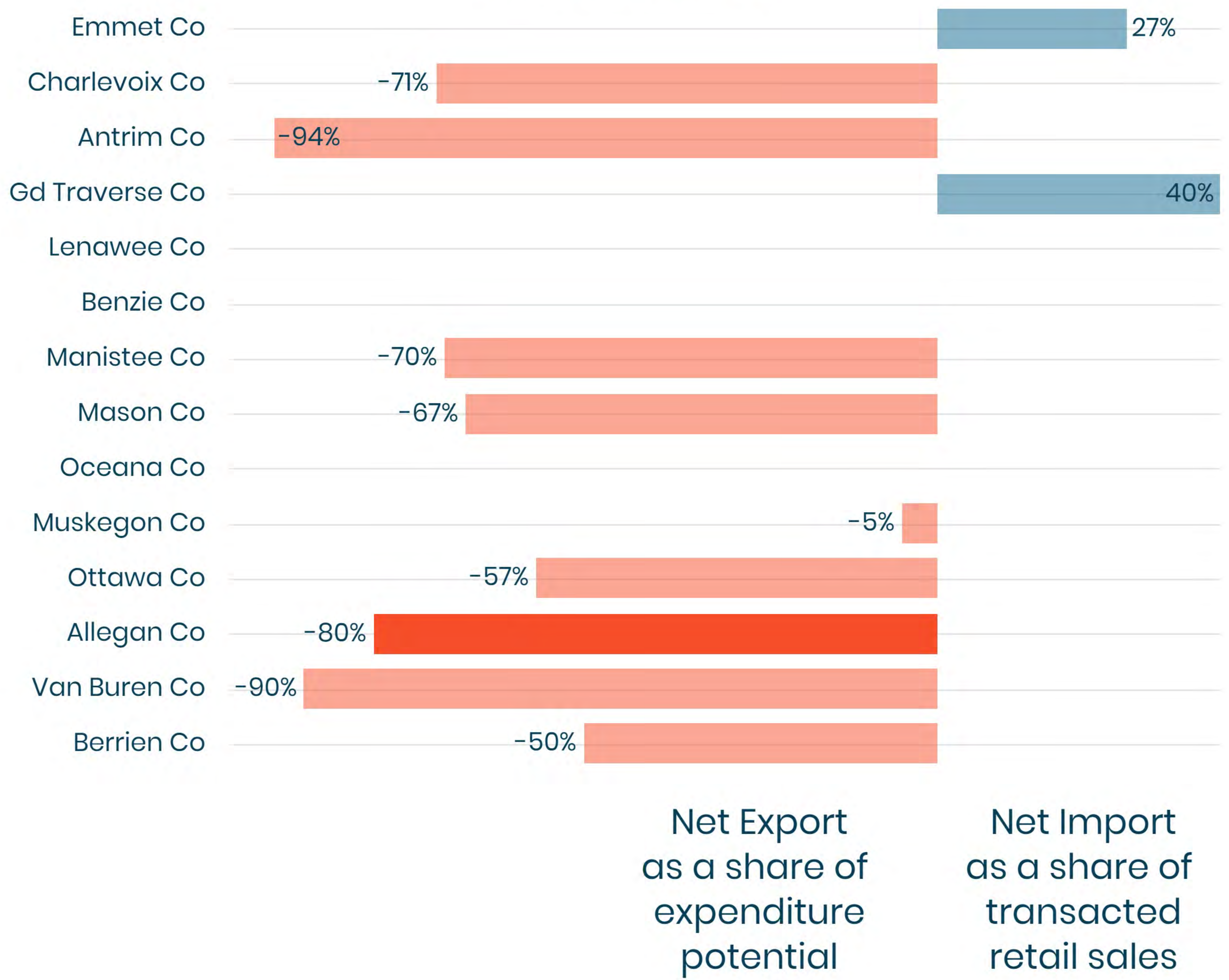
Underlying data provided by the Economic Census though 2012, and county business patterns through 2016, with analysis and forecasts by LandUseUSA | Urban Strategies on behalf of the City of Douglas, 2019.



Retail Leakage | West Shoreline Cos.

Based on transacted retail sales compared to resident expenditure potential.

Annual Net Import and Export
West Shoreline Counties | Listed North to South
Clothing, Apparel, Shoes, and Accessories
NAICS 448

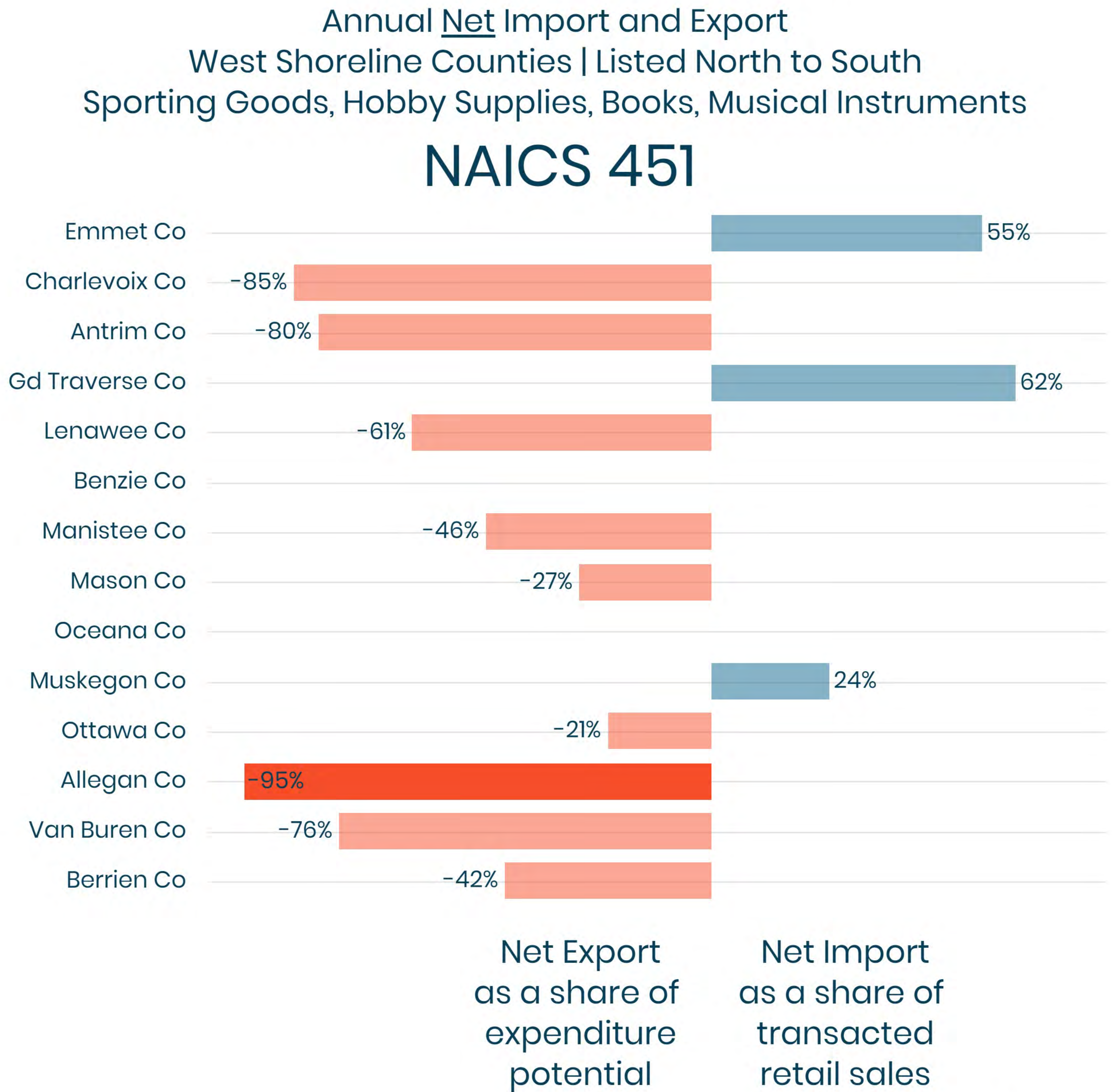


Underlying data provided by the Economic Census though 2012, and county business patterns through 2016, with analysis and forecasts by LandUseUSA | Urban Strategies on behalf of the City of Douglas, 2019.



Retail Leakage | West Shoreline Cos.

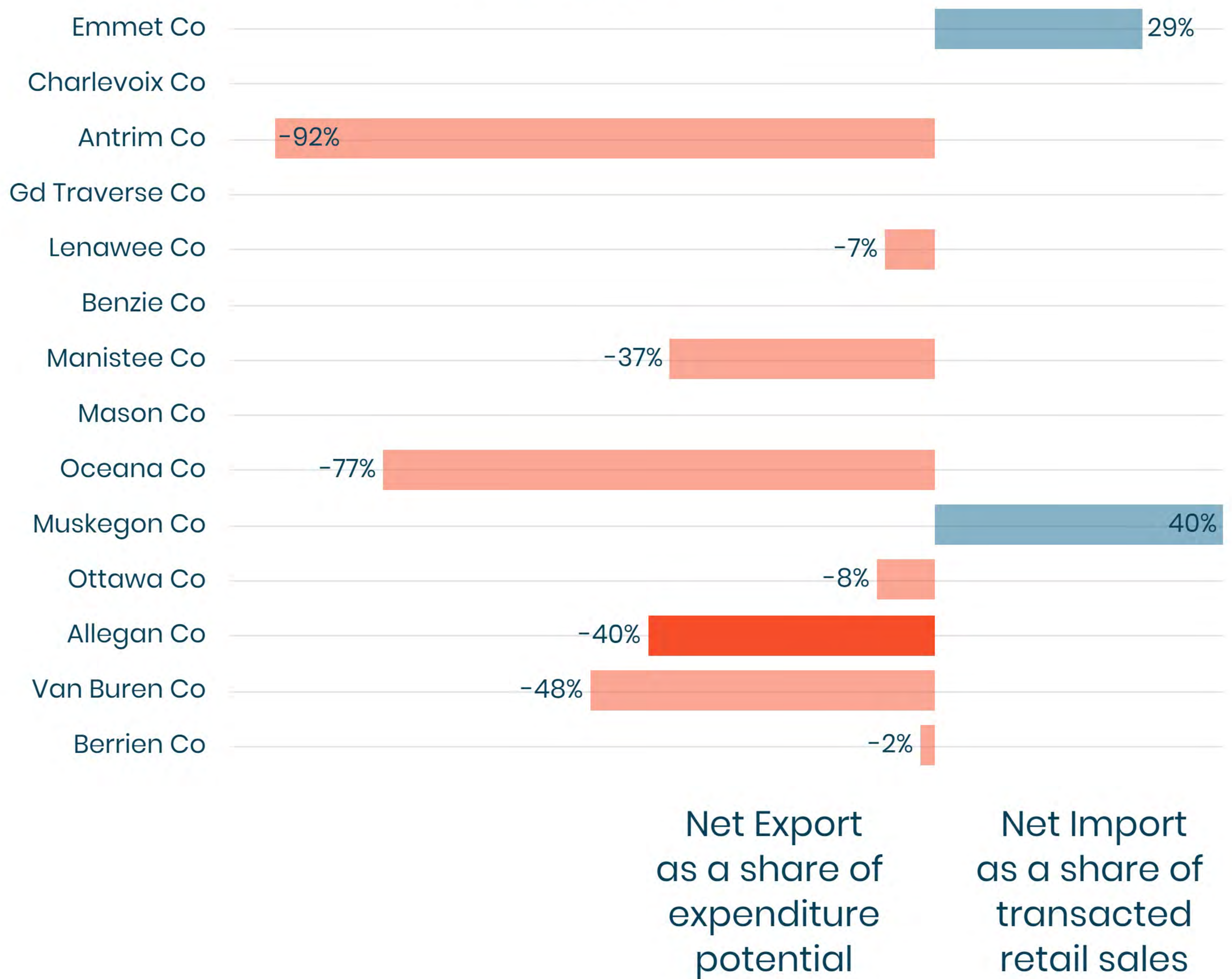
Based on transacted retail sales compared to resident expenditure potential.



Retail Leakage | West Shoreline Cos.

Based on transacted retail sales compared to resident expenditure potential.

Annual Net Import and Export
West Shoreline Counties | Listed North to South
General Merchandise, Discount, and Variety Stores
NAICS 452



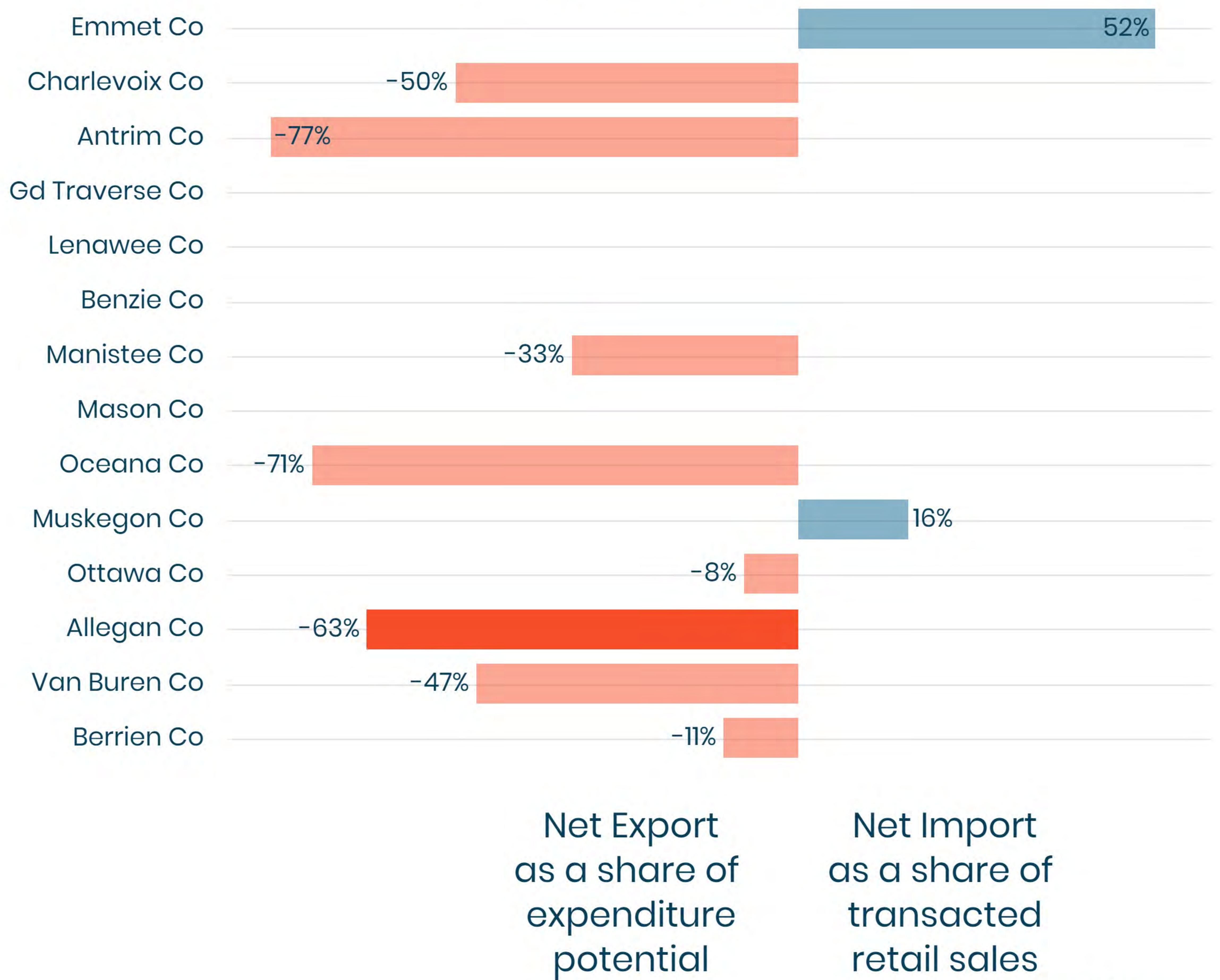
Underlying data provided by the Economic Census though 2012, and county business patterns through 2016, with analysis and forecasts by LandUseUSA | Urban Strategies on behalf of the City of Douglas, 2019.



Retail Leakage | West Shoreline Cos.

Based on transacted retail sales compared to resident expenditure potential.

Annual Net Import and Export
West Shoreline Counties | Listed North to South
Gift and Art Stores, Novelty, Stationary, Office Supplies
NAICS 453

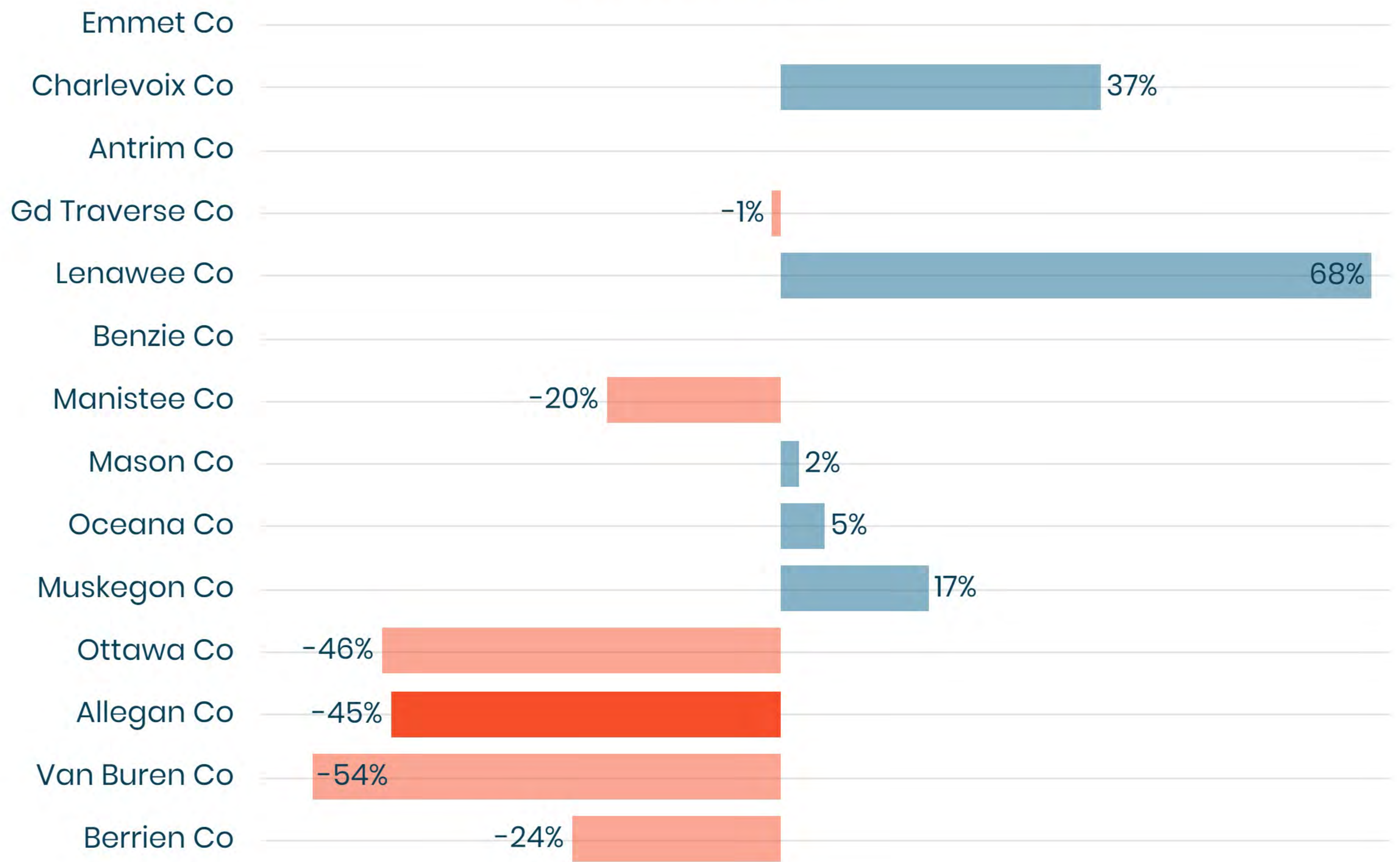


Retail Leakage | West Shoreline Cos.

Based on transacted retail sales compared to resident expenditure potential.

Annual Net Import and Export
West Shoreline Counties | Listed North to South
Cultural Arts, Entertainment, Recreational Venues

NAICS 71



Net Export
as a share of
expenditure
potential

Net Import
as a share of
transacted
retail sales

Underlying data provided by the Economic Census though 2012, and county business patterns through 2016, with analysis and forecasts by LandUseUSA | Urban Strategies on behalf of the City of Douglas, 2019.

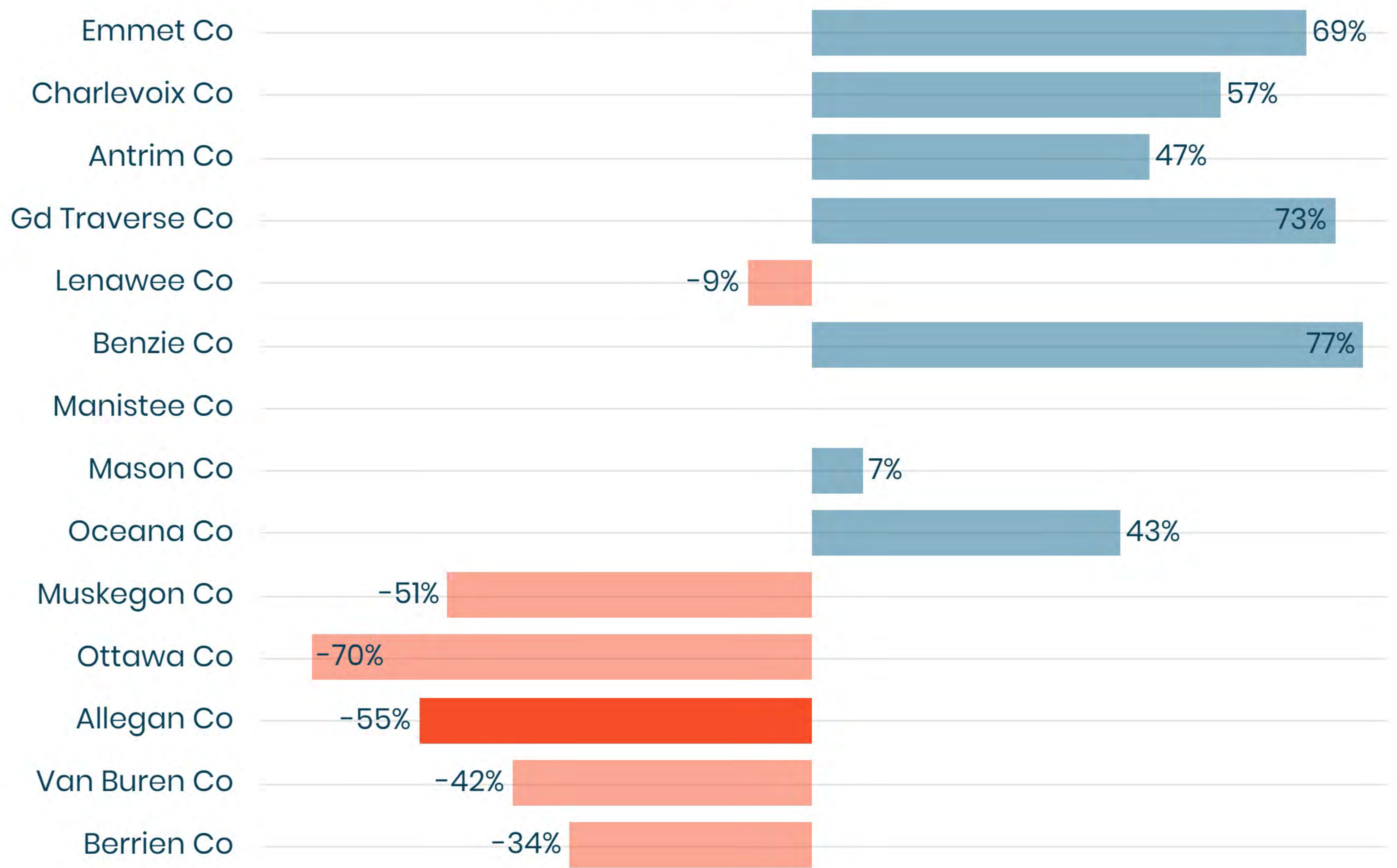


Retail Leakage | West Shoreline Cos.

Based on transacted retail sales compared to resident expenditure potential.

Annual Net Import and Export
West Shoreline Counties | Listed North to South
Overnight Accommodations | Hotels, Motels

NAICS 721



Net Export
as a share of
expenditure
potential

Net Import
as a share of
transacted
retail sales

Underlying data provided by the Economic Census though 2012, and county business patterns through 2016, with analysis and forecasts by LandUseUSA | Urban Strategies on behalf of the City of Douglas, 2019.

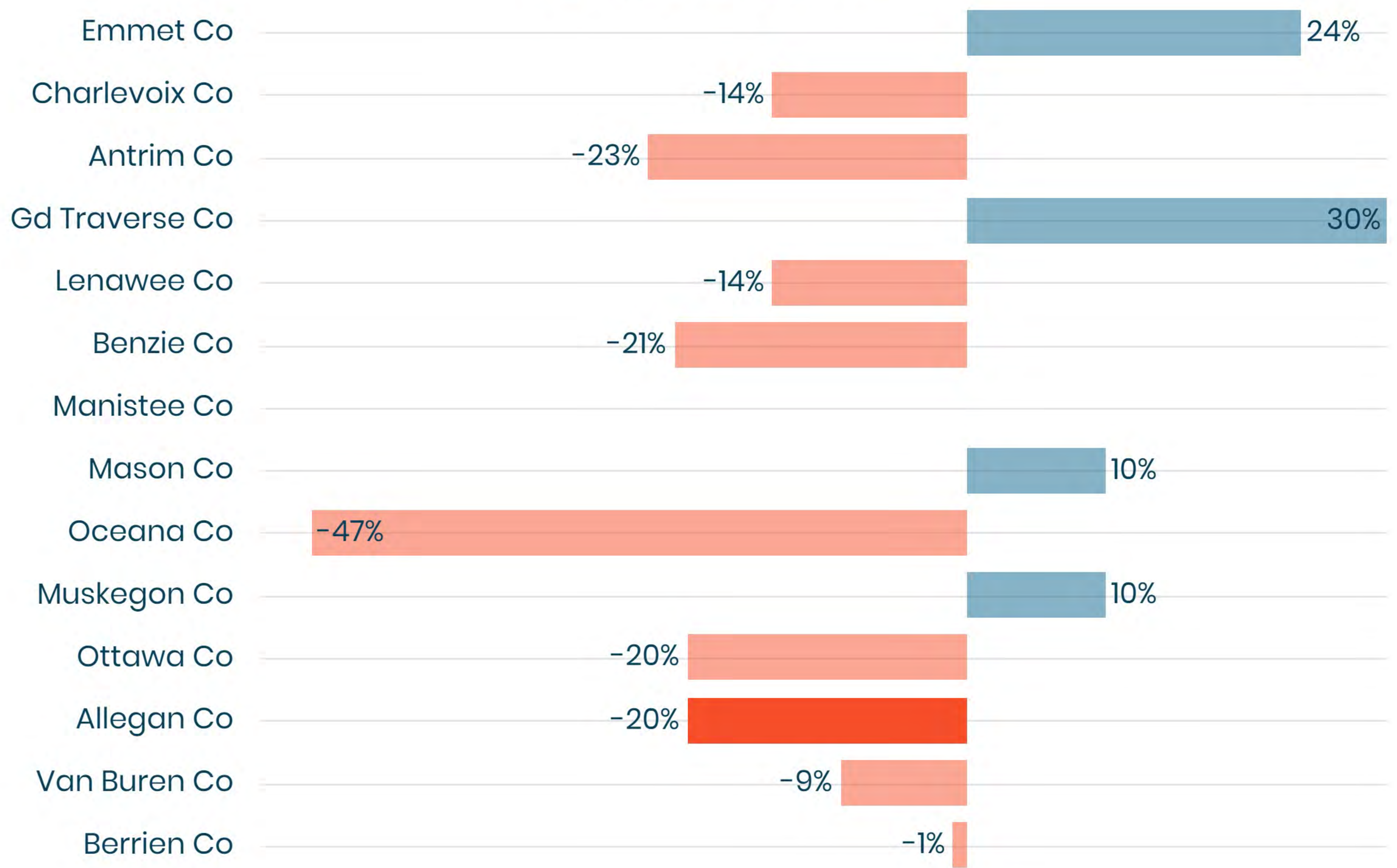


Retail Leakage | West Shoreline Cos.

Based on transacted retail sales compared to resident expenditure potential.

Annual Net Import and Export
West Shoreline Counties | Listed North to South
Restaurants and Drinking Establishments

NAICS 722



Net Export
as a share of
expenditure
potential

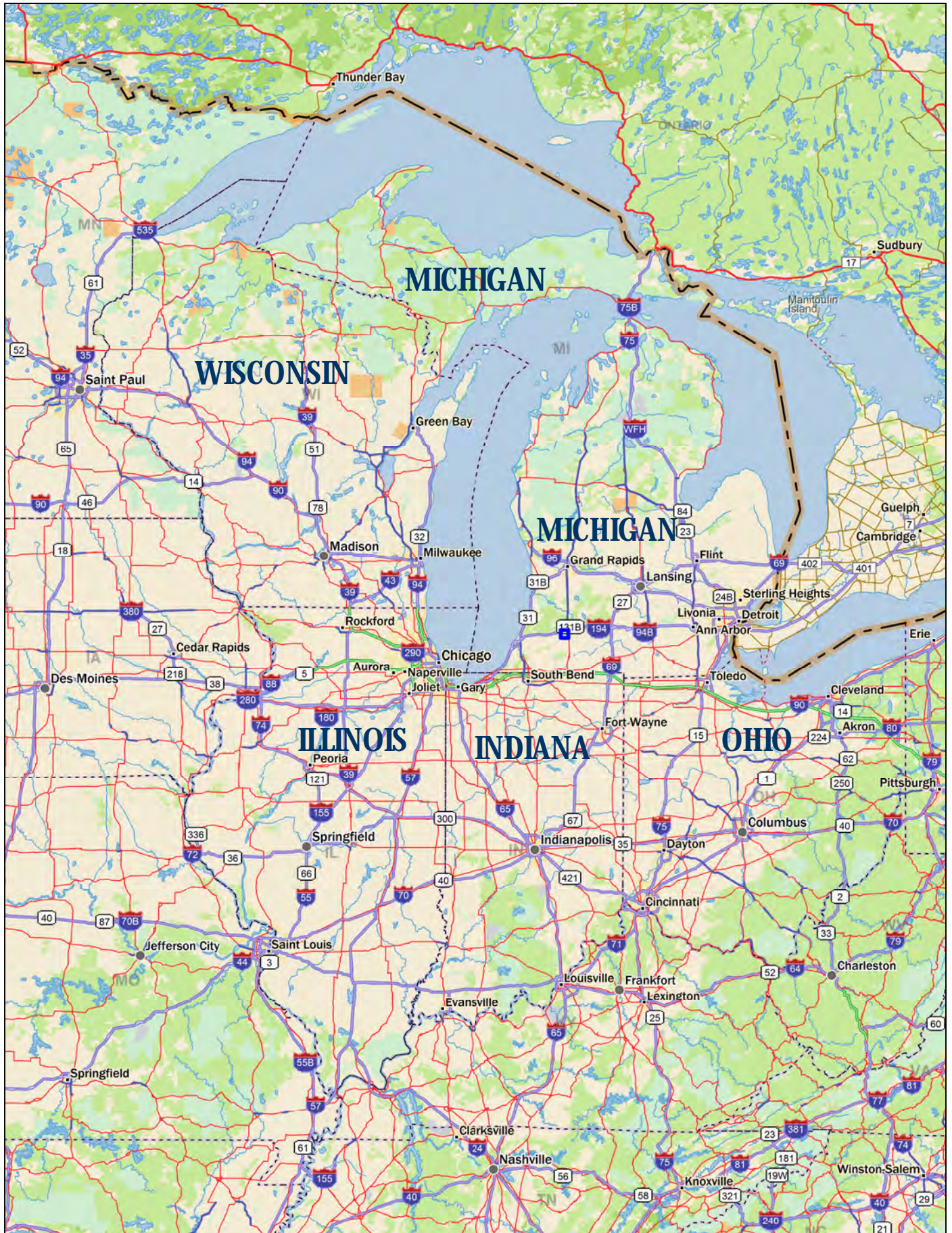
Net Import
as a share of
transacted
retail sales

Underlying data provided by the Economic Census though 2012, and county business patterns through 2016, with analysis and forecasts by LandUseUSA | Urban Strategies on behalf of the City of Douglas, 2019.

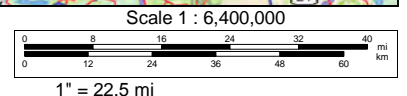


section **e**

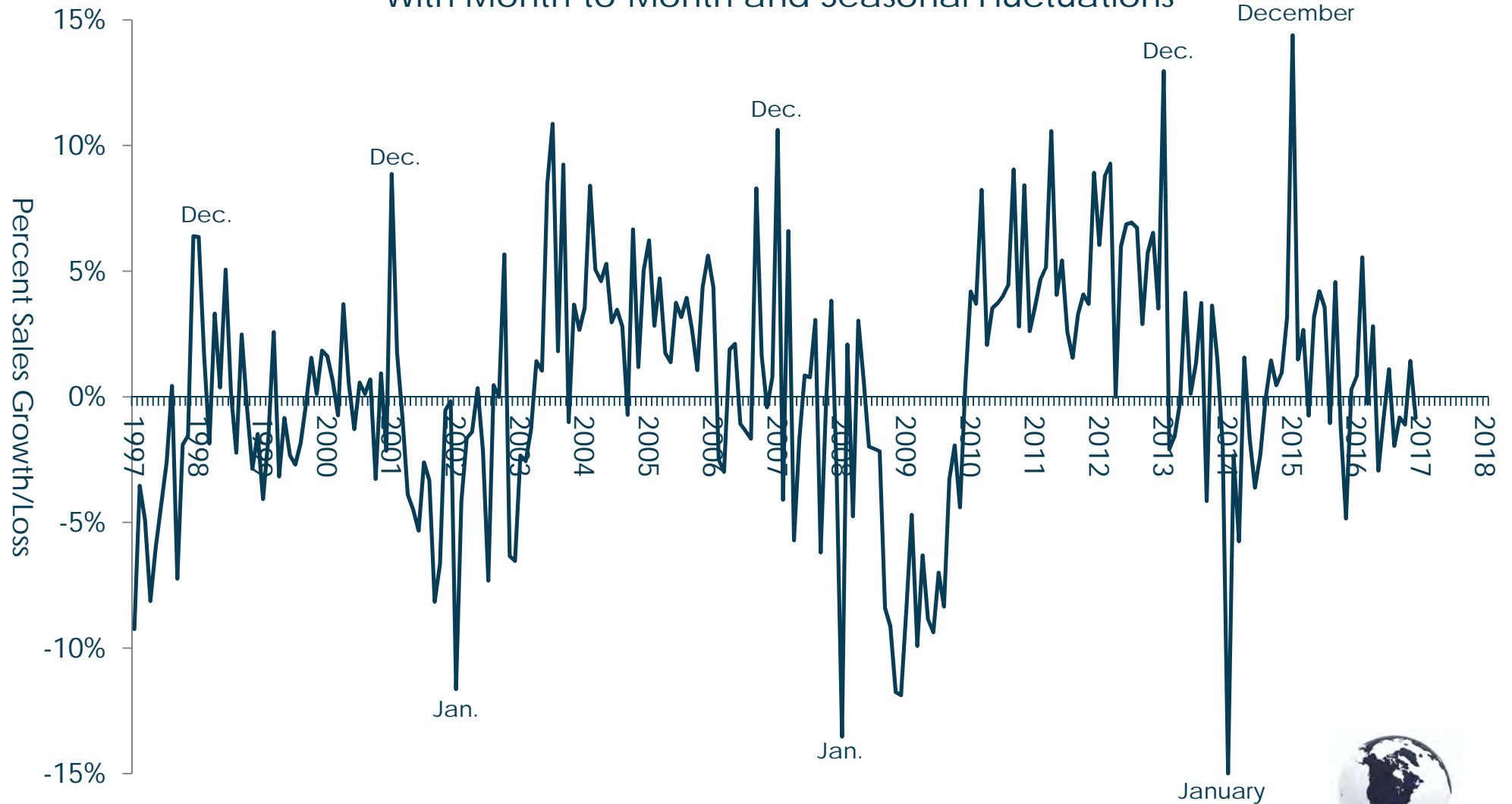
Industry Trends



Geographic Overview - Five Great Lakes States



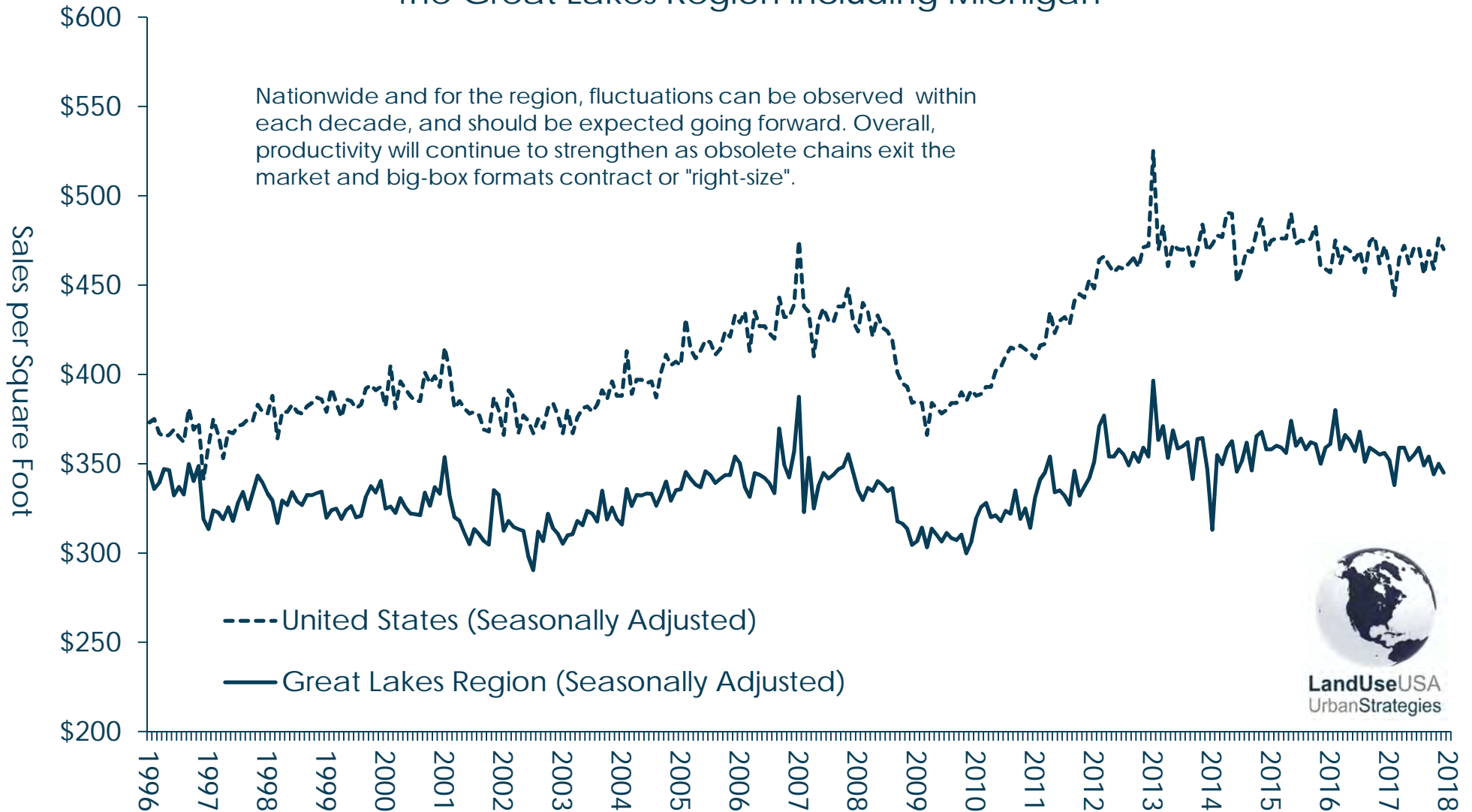
Same-Store Monthly Sales Growth/Loss v. Prior Year
Non-anchor Retail Tenants | Thru December 2017
The Great Lakes Region including Michigan
With Month-to-Month and Seasonal Fluctuations



Analysis and exhibit prepared by LandUseUSA | Urban Strategieis © 2019 with all rights reserved.
The USA and Michigan data is seasonally adjusted. Underlying data provided by the International Council of Shopping Centers. The Great Lakes States includes Michigan, Illinois, Indiana, Ohio, and Wisconsin.



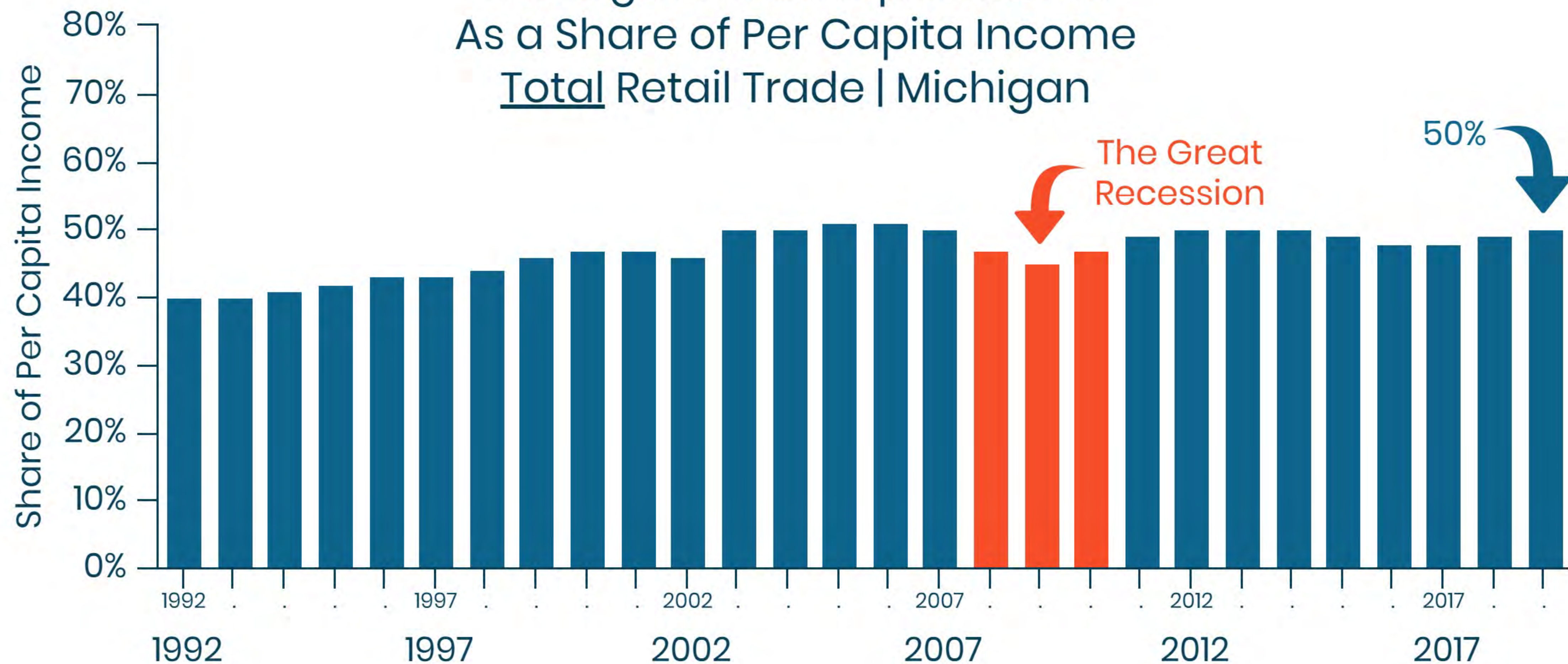
Month-to-Month Sales per Square Foot Non-Anchor Retail Tenants | Through December 2017 The Great Lakes Region including Michigan



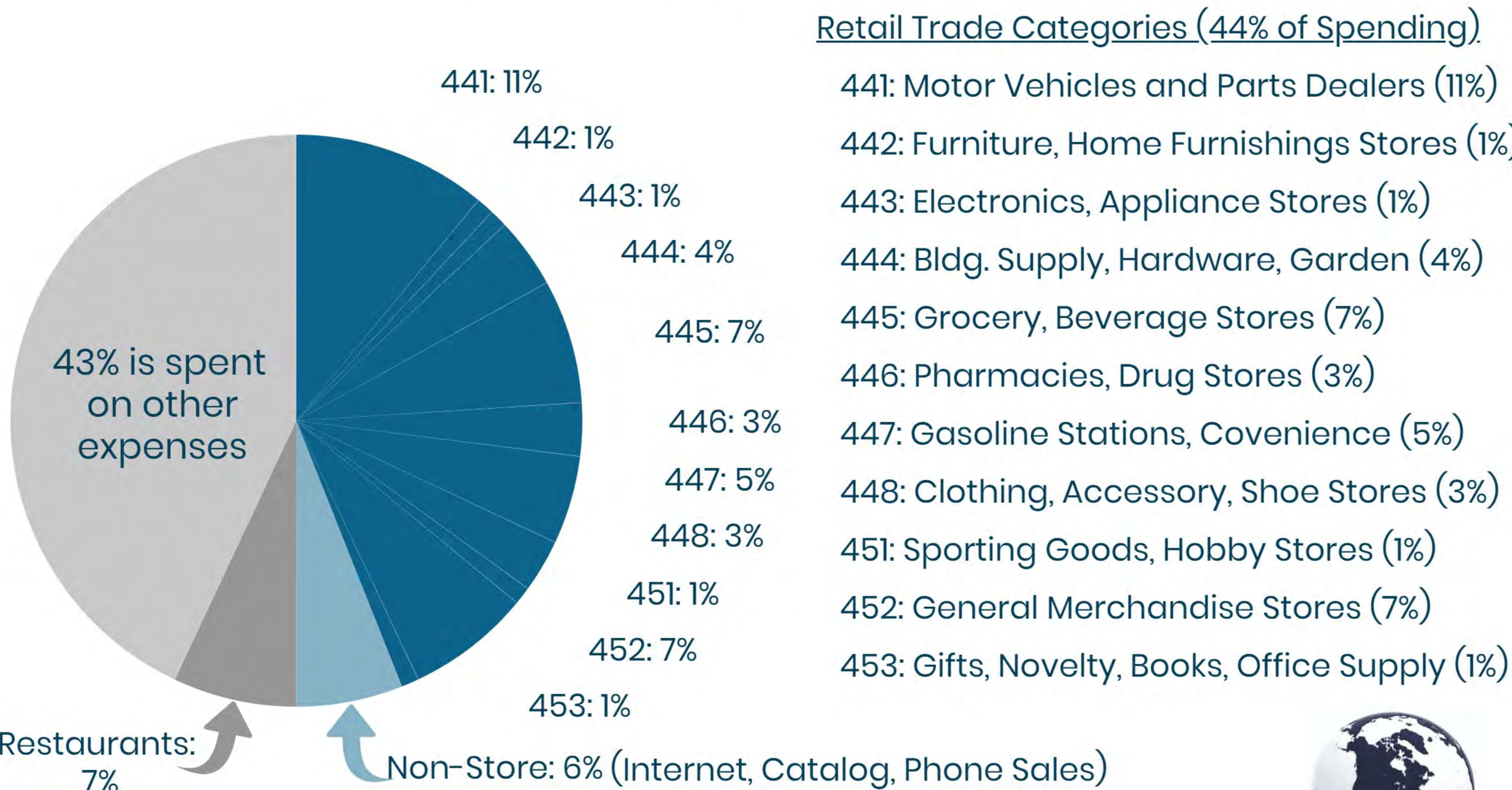
Analysis and exhibit prepared by LandUseUSA | Urban Strategies © 2019 with all rights reserved. The USA and Michigan data are seasonally adjusted. Underlying data provided by the International Council of Shopping Centers. The Great Lakes States include Michigan, Illinois, Indiana, Ohio, and Wisconsin.

Expenditures as a Share of Income

Average Annual Expenditures
As a Share of Per Capita Income
Total Retail Trade | Michigan



2019 Annual Expenditures
As a Share of Per Capita Income
by Retail Category | Michigan

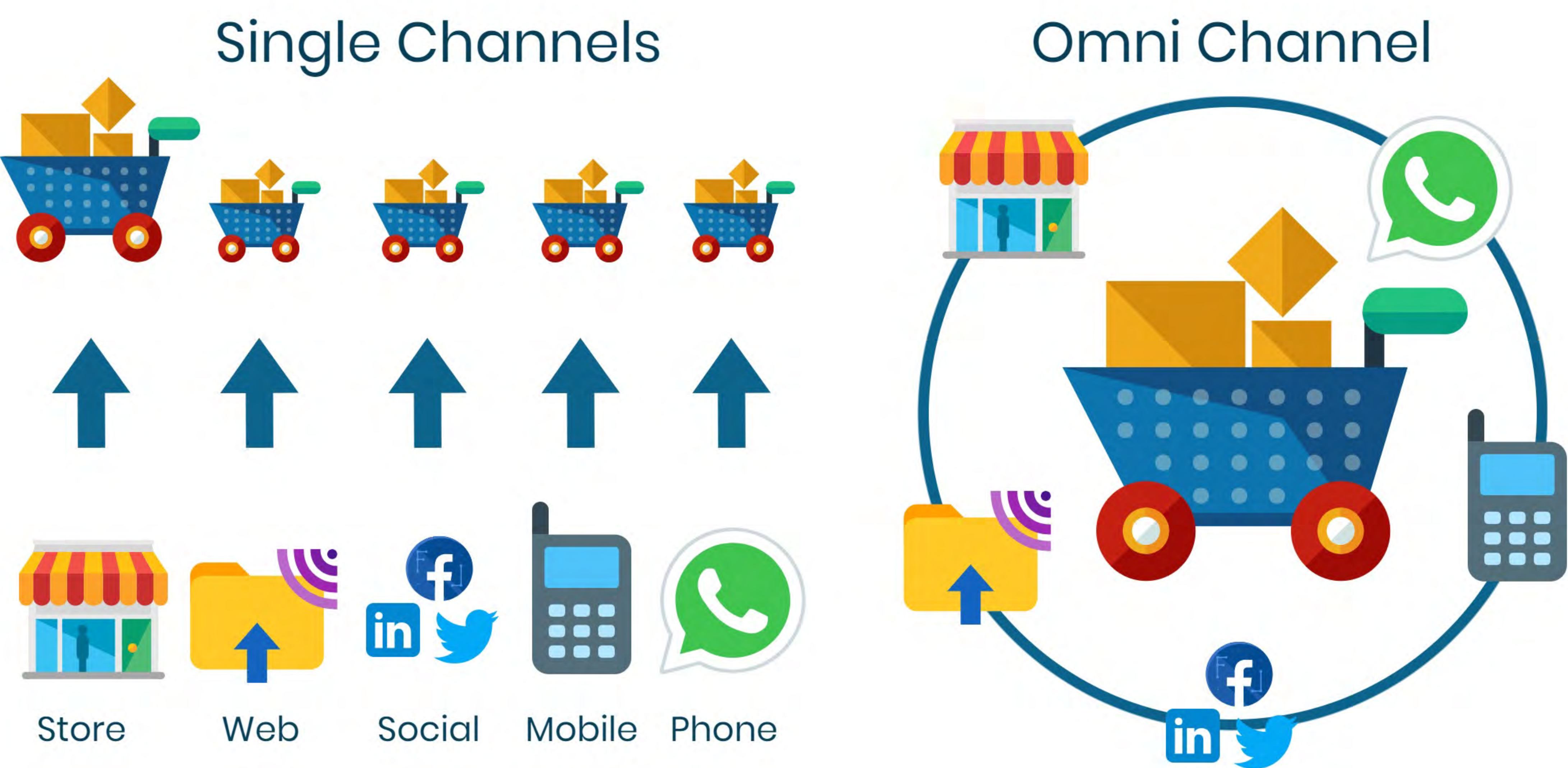


Underlying data represents estimates only; analysis based on the U.S. Census Bureau's Advance Monthly Retail Trade Survey through 2018. Prepared by LandUseUSA | Urban Strategies © with full copyrights and all rights reserved.



The Halo Effect of Omni Channels

Consumers demonstrate the highest loyalty to brick-and-mortar stores that have websites, social media pages, and easy phone and internet ordering.



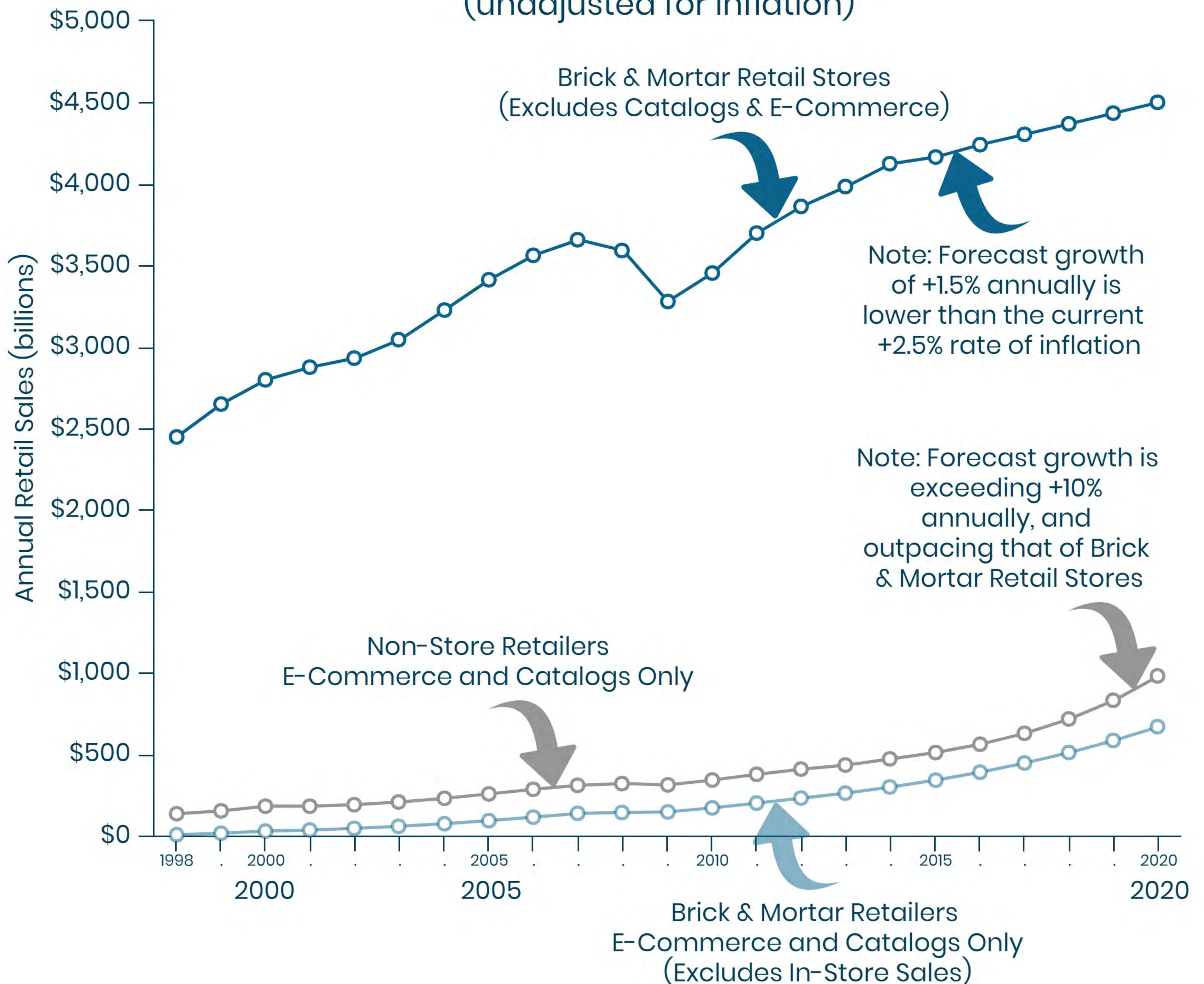
The Halo Effect



Retail Sales with E-Commerce | USA

Demonstrating low but accelerating online and catalog sales

Annual Retail Sales (billions)
By Type, Including E-Commerce
The United States
(unadjusted for inflation)



Underlying data represents estimates only; analysis based on the U.S. Census Bureau's Annual Monthly Retail Trade Survey through 2016. Prepared by LandUseUSA | Urban Strategies © with full copyrights and all rights reserved.



LandUseUSA
UrbanStrategies

section **f**

71 Lifestyle Clusters

Participation Rates by Activity

Lifestyles and Housing Preferences | Michigan Averages

Observations: Compared to averages for the State of Michigan, residents living on and near the Great Lakes shorelines are significantly more inclined to dine out and use fitness paths and trails. They are slightly more likely to visit beaches and lakes; or seek out a fitness club or gym. They do not seem more more likely to seek out fishing marinas, and they are less likely to visit billiard halls.

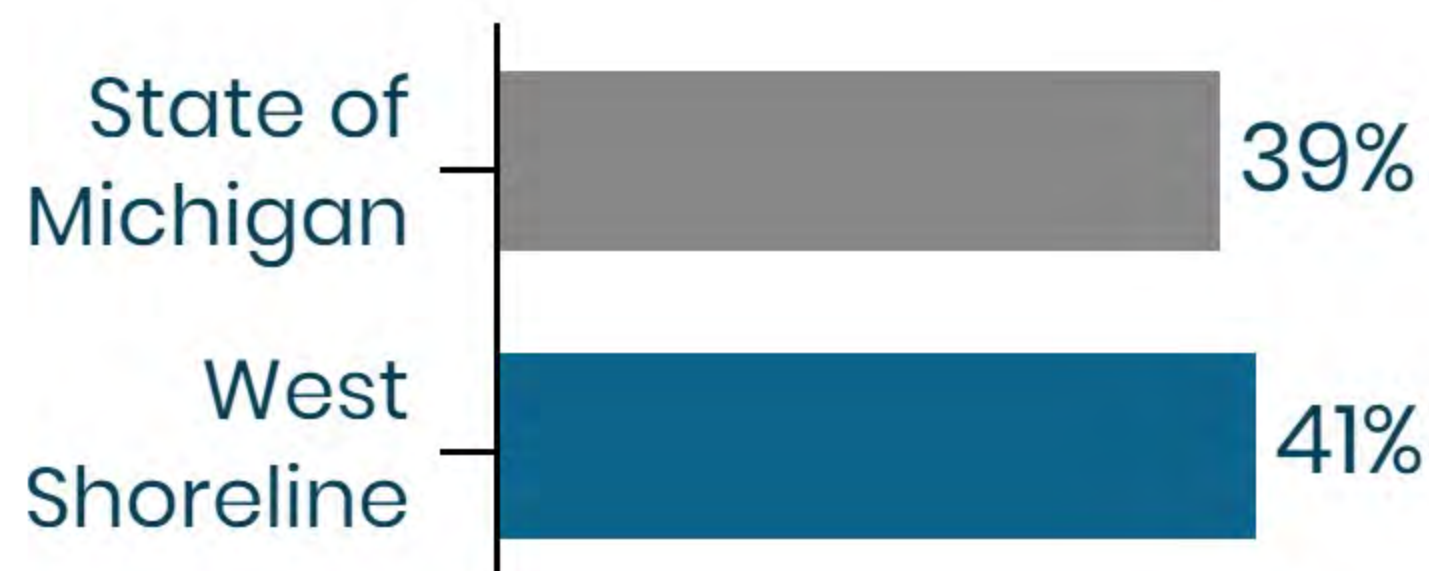
Dining Out (not fast food)



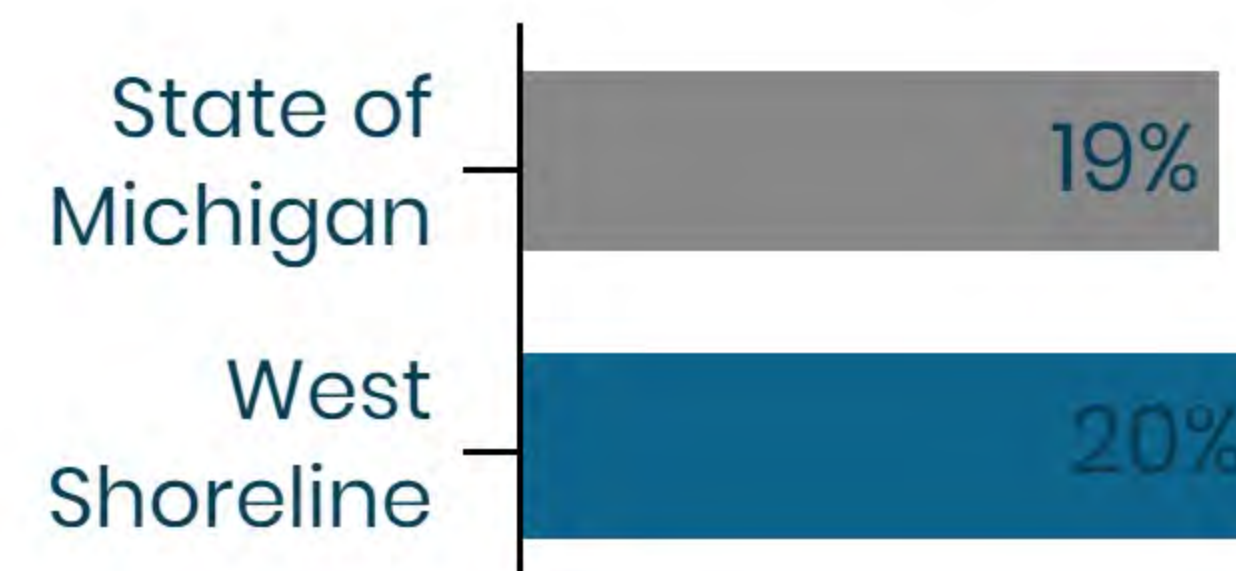
Fitness Paths, Trails



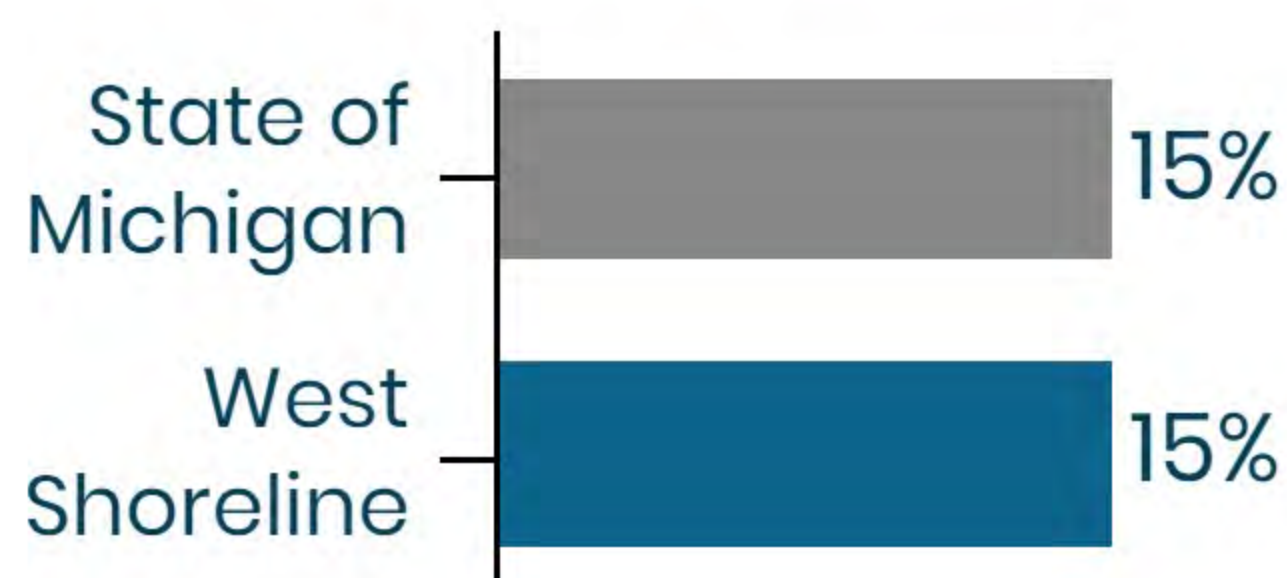
Beaches and Lakes



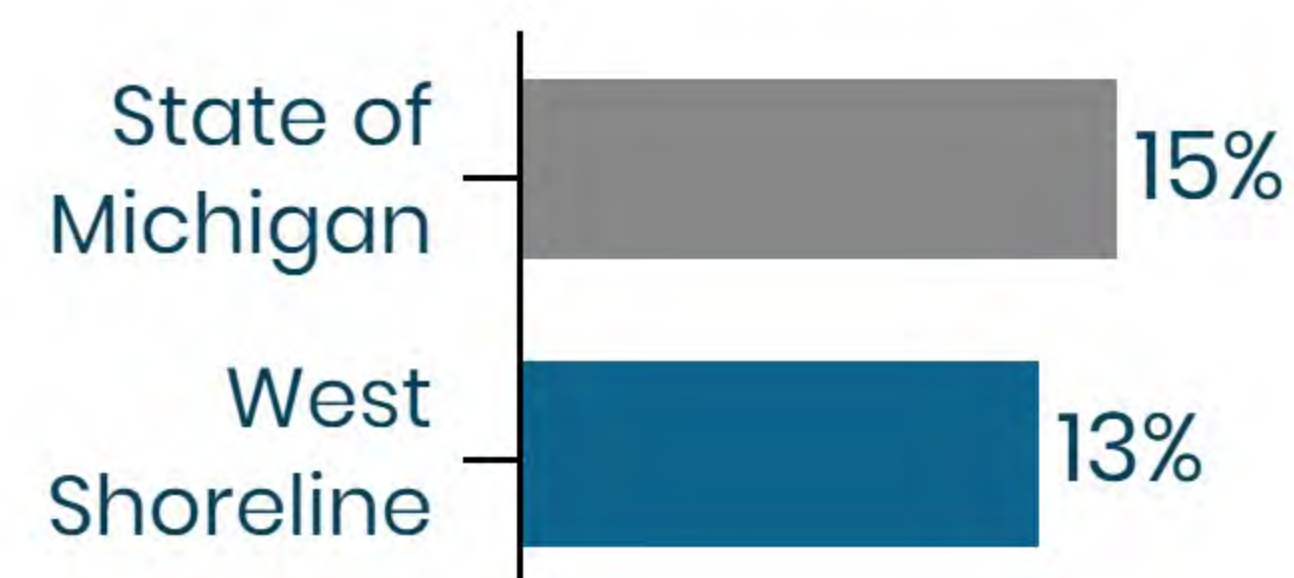
Fitness Clubs, Gyms



Fishing Marinas



Billiard Halls



Golf Courses, Clubs



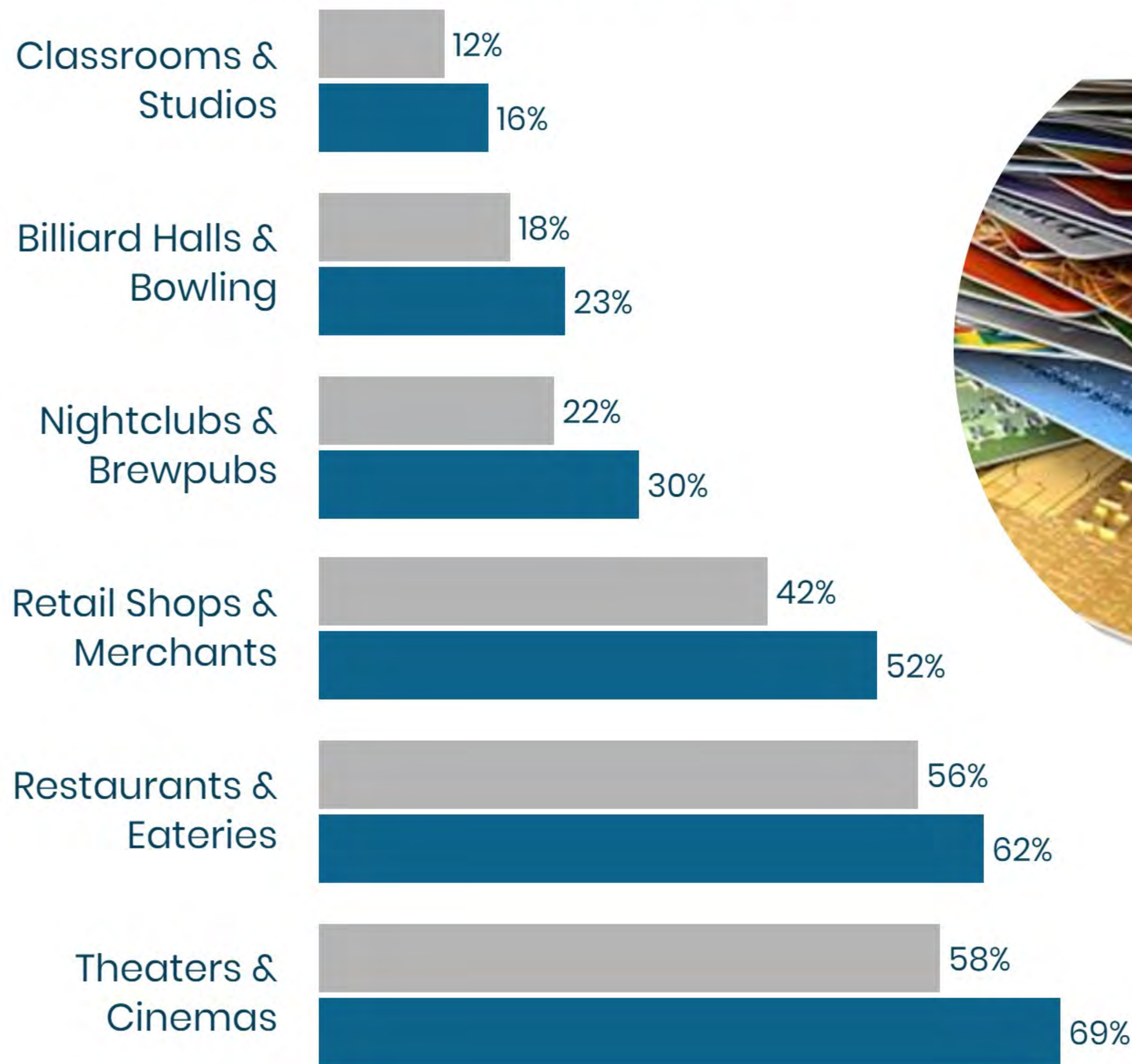
Power Boat Marinas



Urban Target Markets | MICHIGAN

An assessment to shopping inclination among urban residents.

Share of Households Inclined to Visit
Retail and Entertainment Venues



● Urban Target Markets ● Michigan Averages

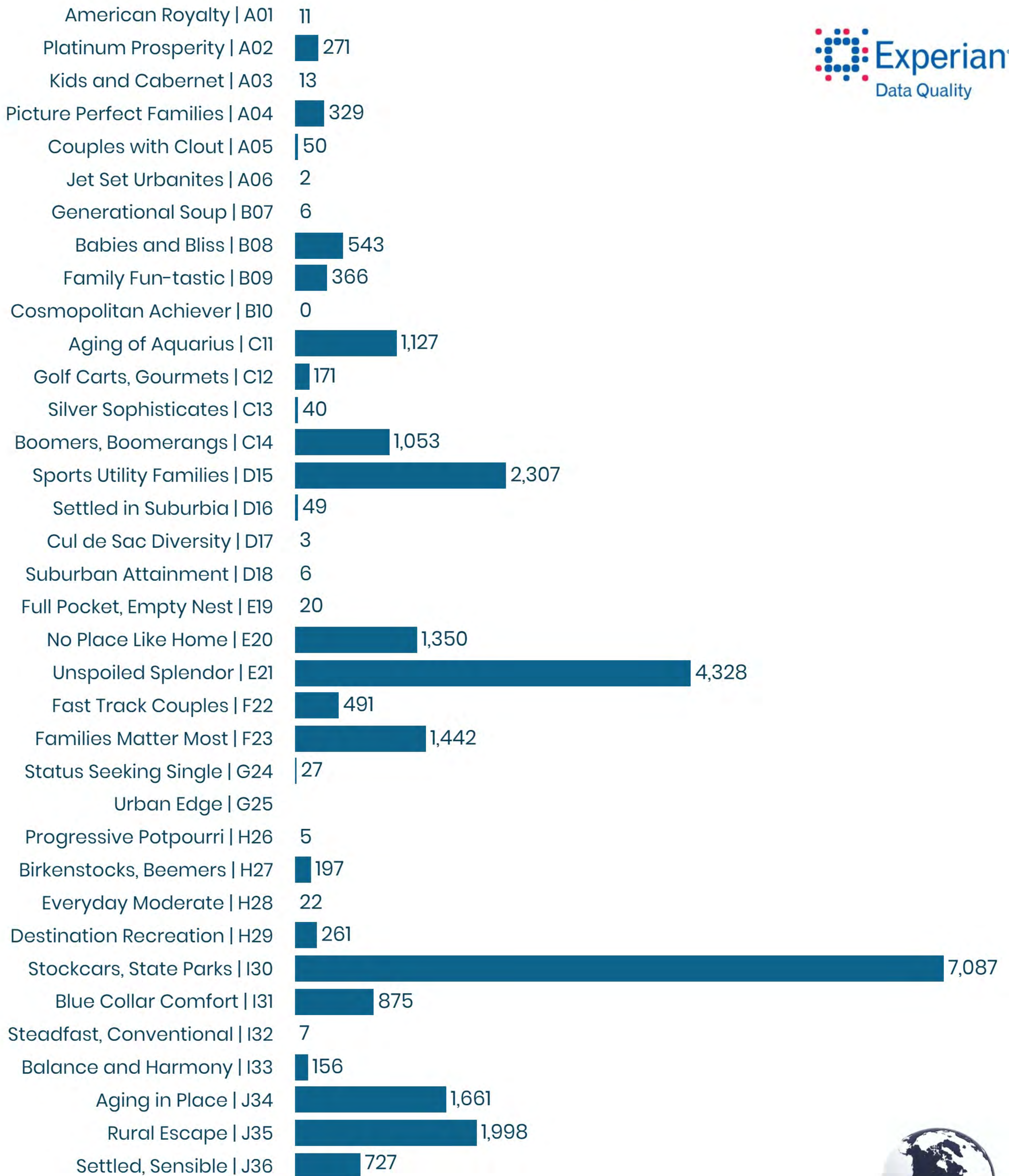
Urban Target Markets are inclined to shop at downtown merchants, and they also expect complementary amenities that help make downtowns and town centers great. Compared to national averages, they are more likely to visit and spend on theaters, restaurants, nightclubs, and billiard halls. They also have higher participation rates in educational classes and studio demonstrations.

Similar results have been observed in participation rates in recreational venues like trails, fitness centers, and waterfront attractions with beaches, marinas, and boating. Together with a smart placemaking process, all of these amenities should be integrated into each community to help intercept urban target markets who are on the move and seeking vibrant places to live.



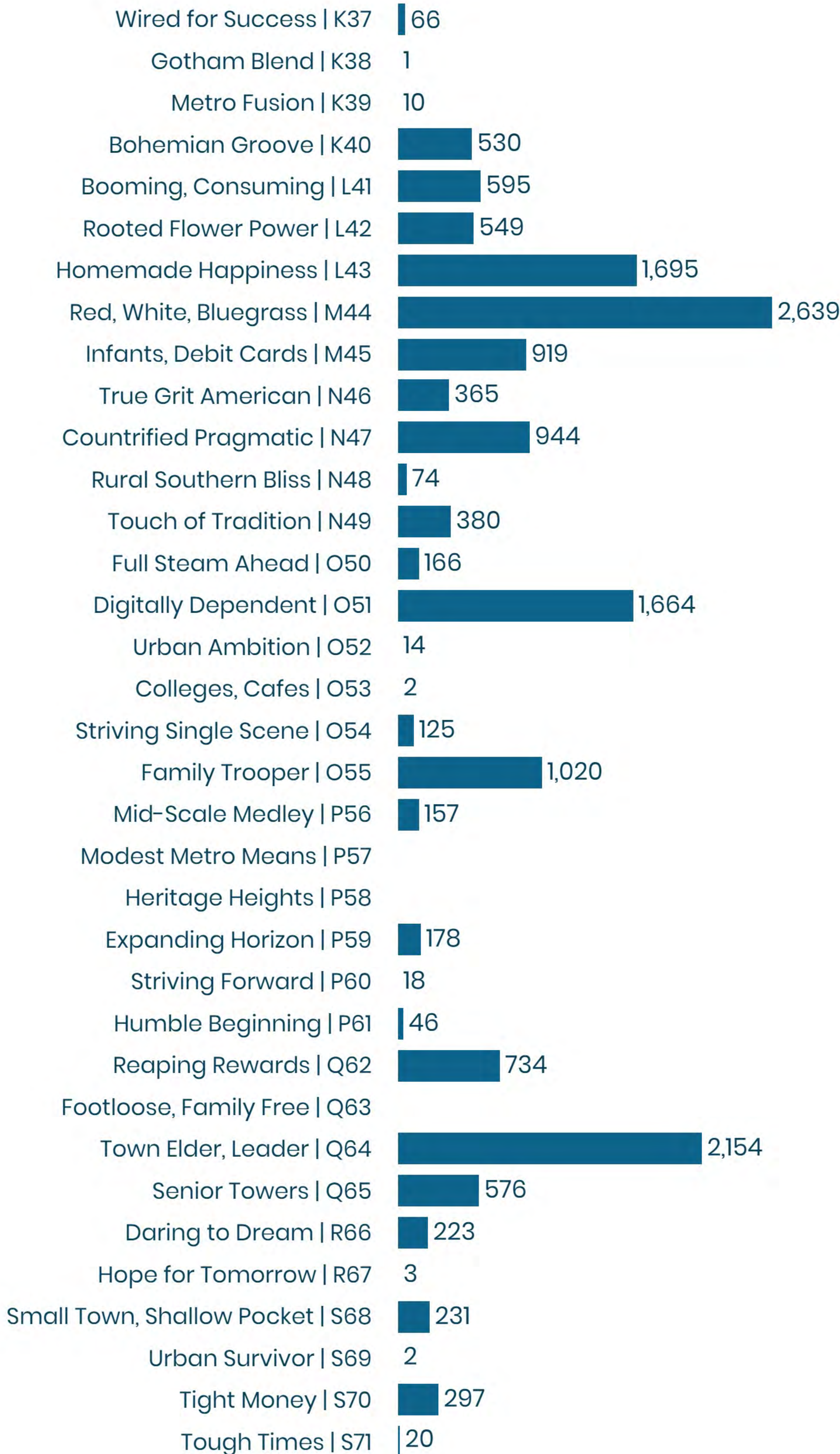
1-36 Lifestyle Clusters | Allegan County

All resident households living in the county, including Douglas, Saugatuck, & Fennville.



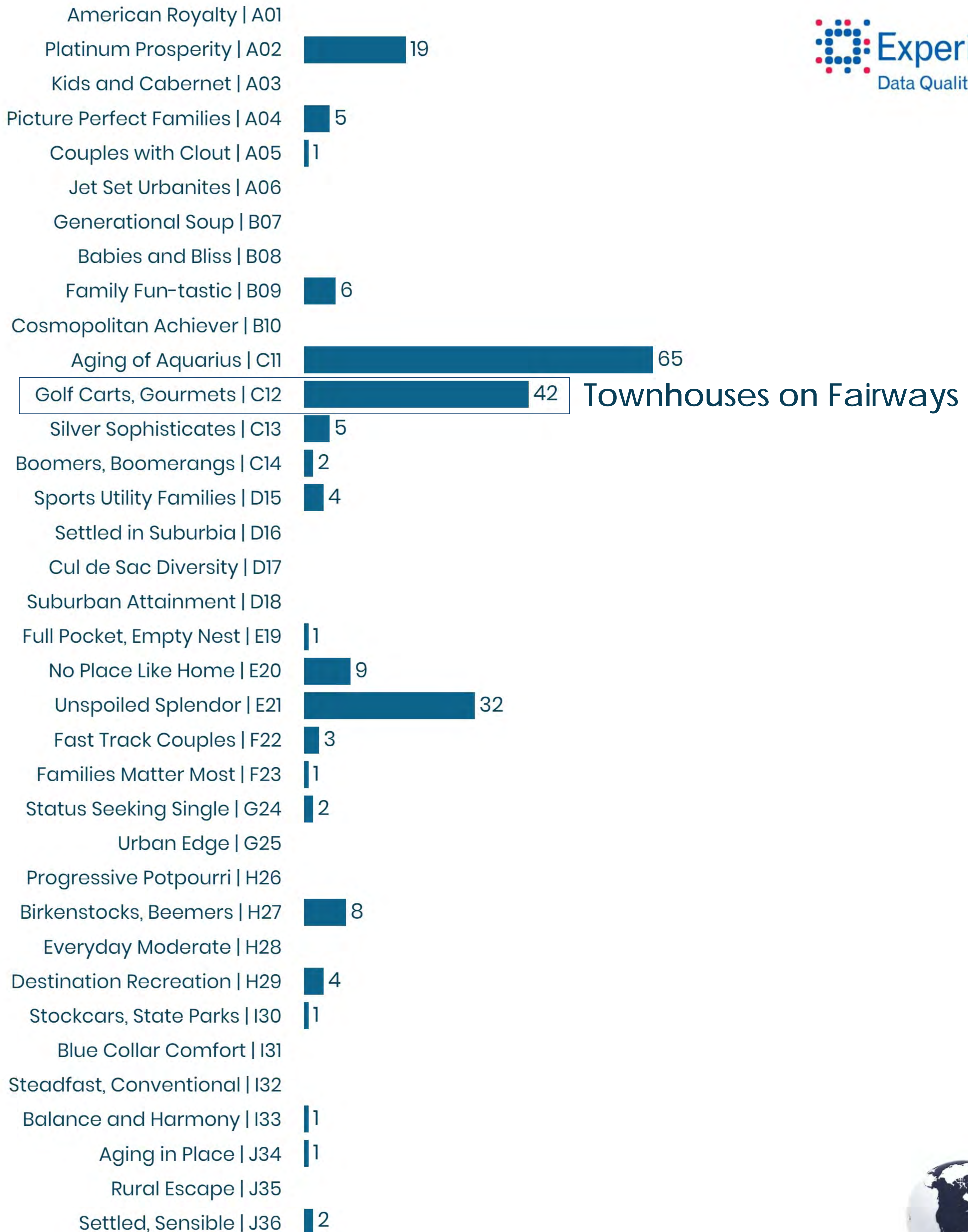
37-71 Lifestyle Clusters | Allegan County

All resident households living in the county, including Douglas, Saugatuck, & Fennville.



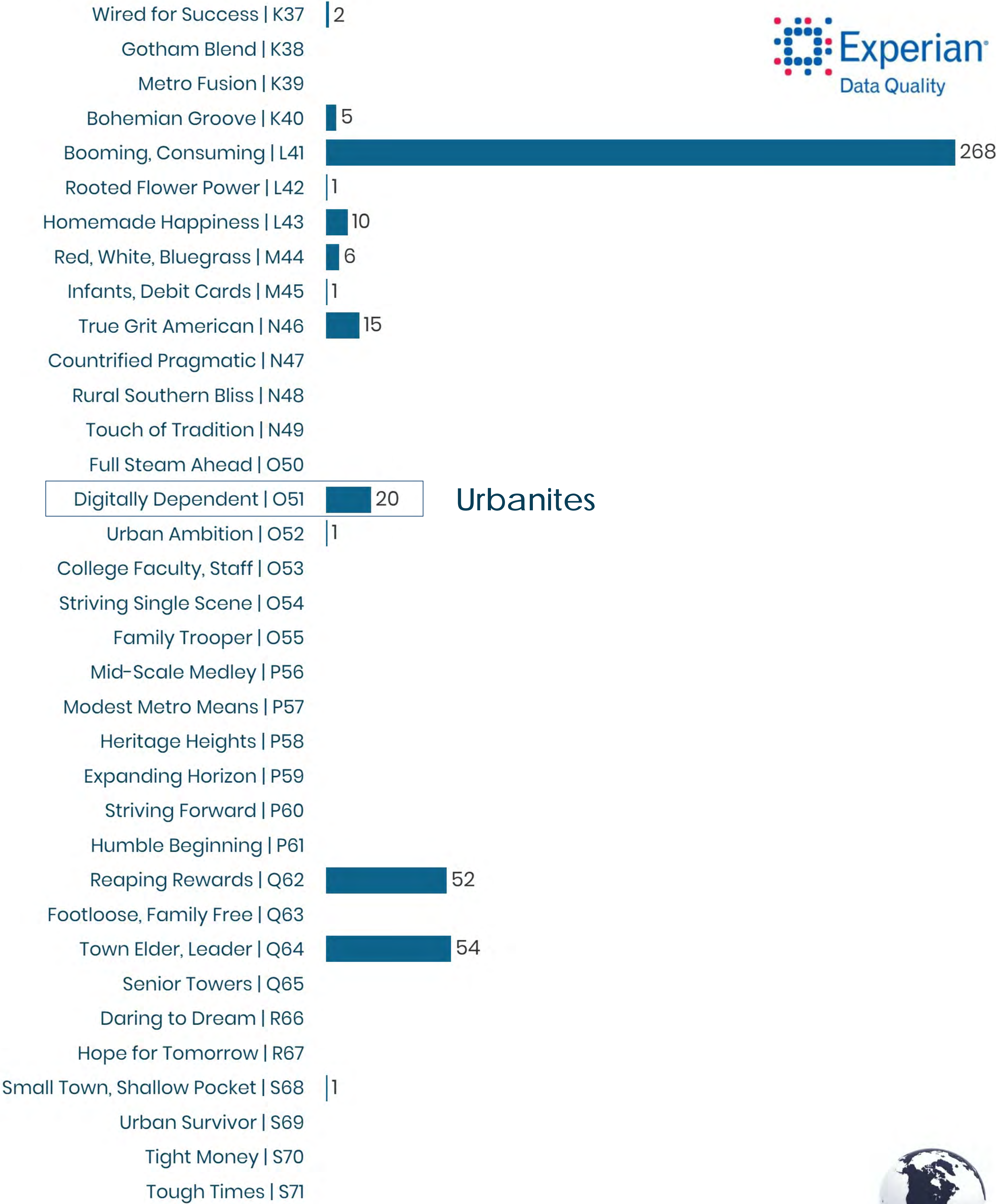
1-36 Lifestyle Clusters | Douglas

All established households reporting the City of Douglas as their primary residence.



37-71 Lifestyle Clusters | Douglas

All established households reporting the City of Douglas as their primary residence.



Urbanites

Half of all Lifestyle Clusters | Nationwide

A01 – J36 | Better-to-Upper Incomes

- A01 | American Royalty - Wealthy influential couples and families in prestigious communities - Suburbs.
A02 | Platinum Prosperity - Wealthy and established empty-nesting couples - Suburbs.
A03 | Children & Cabernet - Prosperous, middle-aged married couples focused on their children's lives - Suburbs.
A04 | Picture Perfect Families - Established families of child-raising households in wealthy communities - Suburbs.
A05 | Couples with Clout - Middle-aged childless couples living in affluent areas - Metros.
A06 | Jet Set Urbanites - Mix of affluent singles and couples enjoying diverse neighborhoods - Urban.
- B07 | Generational Soup - Affluent couples and multi-generational families, wide range of lifestyles - Suburbs.
B08 | Babies & Bliss - Middle-aged couples with large families and active lives - Suburbs.
B09 | Family Funtastic - Upscale, middle-aged families with busy lives focused on older children - Satellite Cities.
B10 | Cosmopolitan Achievers - Affluent middle-aged, established couples & families, dynamic lifestyles - Metros.
- C11 | Aging of Aquarius, Settled - Upscale boomer couples settled in detached houses - Cities, Nearby Suburbs.
C12 | Golf Carts & Gourmets - Upscale retirees & empty-nesters in comfortable golf communities - Urban Edges.
C13 | Silver Sophisticates - Mature, upscale couples & singles in larger detached houses - Suburbs.
C14 | Boomers & Boomerangs - Baby boomer adults with young adult children sharing their house - Suburbs.
- D15 | Sports Utility Families - Upscale, multi-generational, middle-aged families, active lifestyles - Outer Suburbs.
D16 | Settled in Suburbia - Upper-middle-income diverse families & empty nesters - Established Suburbs.
D17 | Cul de Sac Diversity - Culturally diverse, middle-aged families settling into emerging communities - Suburbs.
D18 | Suburban Attainment - Upper middle-class couples and families moving to newer communities - Suburbs.
- E19 | Full Pockets & Empty Nests - Empty-nesters, discretionary income and sophisticated lifestyles - Most Cities.
E20 | No Place Like Home - Middle-to-upper income, multi-generational households, detached houses - Urban Edges.
E21 | Unspoiled Splendor - Comfortably established baby boomer couples, detached houses - Small Cities, Rural.
F22 | Fast Track Couples - Young, upwardly-mobile couples with active lifestyles - Inner Suburbs.
F23 | Families Matter Most - Young, middle-to-upper income families with active, family-focused lives - Suburbs.
- G24 | Status Seeking Singles - Young, upwardly-mobile singles balancing work and leisure - Metros, Urban.
G25 | Urban Edge - Younger, up-and-coming singles living big-city lifestyles - Largest Metros.
- H26 | Progressive Potpourri - Mature couples with comfortable and active lives - Suburbs.
H27 | Birkenstocks & Beemers - Middle-to-upper income couples living leisurely lifestyles - Small Cities.
H28 | Everyday Moderates - Multi-cultural couples & families choosing modest lifestyles - Suburbs to Mid-sized Cities.
H29 | Destination Recreation - Middle-aged couples working hard to support active lifestyles - Small Cities, Suburbs.
- I30 | Stockcars & State Parks - Middle-income couples & families seeking affordable entertainment - Small Cities.
I31 | Blue Collar Comfort - Middle-income families working solid, blue-collar jobs - Small Cities.
I32 | Steadfast Conventionalists - Conventional Gen-X families in conventional detached houses - Coastal Cities.
I33 | Balance & Harmony - Middle-income families with lively lifestyles - City-Centric Neighborhoods.
- J34 | Aging in Place Already - Middle-income seniors established in their homes, preferring to stay - Suburban.
J35 | Rural Escape - Older, middle-income couples & singles, living modestly, comfortably - Small Cities, Rural Edges.
J36 | Settled & Sensible - Older, middle-income, empty nest couples & singles living sensibly - City Neighborhoods.

Half of all Lifestyle Clusters | Nationwide

K37 – S71 | Lower-to-Moderate Incomes

- K37 | Wired for Success - Young, middle-income singles and couples living socially-active lives - Cities.
- K38 | Gotham Blend - Middle-aged, middle-income singles & couples with big city lifestyles - Urban, Large Cities.
- K39 | Metro Fusion - Middle-aged singles living active lifestyles with a wide range of backgrounds - Urban.
- K40 | Bohemian Groove - Older, unattached singles enjoying settled lives in detached houses - Urban Neighborhoods.
- L41 | Booming & Consuming - Older empty nester couples and singles enjoying relaxed lifestyles - Small Cities.
- L42 | Rooted Flower Power - Middle-income baby boomer singles & couples, rooted & nearing retirement - Suburban.
- L43 | Homemade Happiness - Middle-income baby boomers in detached houses - Small Cities, Rural.
- M44 | Red, White, Bluegrass - Middle-income families with diverse household dynamics - Rural.
- M45 | Infants and Debit Cards - Young, working families & single parents in small houses - Urban Neighborhoods.
- N46 | True Grit Americans - Older, middle-income households located in nation's mid-section - Small Cities, Rural.
- N47 | Countrified Pragmatics - Middle-income couples and singles with casual lifestyles - Rural.
- N48 | Rural Country Bliss - Middle-income, multi-generational families in the nation's south - Small Cities, Rural.
- N49 | Touch of Tradition - Working, middle-aged couples and singles in detached houses - Rural.
- O50 | Full Steam Ahead - Young and middle-aged singles on the move forward and upward - Mid-Sized Cities.
- O51 | Digital Dependents - Gen-X and Gen-Y singles living digitally-driven lifestyles - Urban.
- O52 | Urban Ambition - Gen-Y singles, some with children, moving into urban places - Mid-Sized Cities, Urban.
- O53 | Colleges & University Affiliates - Young singles, alumni, recent grads, staff connected to colleges - College Towns.
- O54 | Striving Single Scene - Young singles, upwardly mobile, aspiring in early careers - City Centers, Urban.
- O55 | Family Troopers - Families & single parents, with current or recent connections to the military - Nationwide.
- P56 | Mid-Scale Medley - Middle-aged, moderate-income singles, many starting over - Mid-Sized Cities.
- P57 | Modest Metro Means - Moderate-income singles settled in moderate communities - Inner-City Neighborhoods.
- P58 | Heritage Heights - Moderate-income singles & families settled in apartments - Urban, Compact Neighborhoods.
- P59 | Expanding Horizons - Middle-aged, middle-income families - Border Towns.
- P60 | Striving Forward - Moderate-income families & single parents in newer communities - Urban Edges.
- P61 | Humble Beginnings - Multi-cultural singles, some with children, starting in apartments - Inner-Cities, Urban.
- Q62 | Reaping Rewards - Retired couples and widowed singles living relaxed, quiet lives in detached houses - Suburban.
- Q63 | Footloose and Family Free - Older couples and widowed singles living active, comfortable lives - Urban Edges.
- Q64 | Town Elders & Leaders - Elders and community leaders settled into small houses and living frugally - Small Cities.
- Q65 | Senior Discounts & Towers - Low-income seniors in apartments with some rent assistance - Metros, City Edges.
- R66 | Daring to Dream - Aspiring young couples & singles, some with children, just starting out - Inner-City, Urban.
- R67 | Hoping Tomorrow - Hopeful, young, single parents with low-incomes, living in apartments - Mid-Sized Cities.
- S68 | Small Towns & Shallow Pockets - Older, low-income empty nesters & singles, tight budgets. - Small Satellite Cities.
- S69 | Urban Survivors - Older, low-income singles, some with children, settled & living modestly - Urban Neighborhoods.
- S70 | Tight Money - Middle-aged, low-income, unattached singles seeking to move upward - Small Cities, Urban Edges.
- S71 | Tough Times - Older, low-income singles, struggling to get by, apartments - Inner-Cities, Compact Neighborhoods.

section **g**

Target Market Profiles

Wealthy and established empty-nesting couples residing in lavish suburban homes

Platinum Prosperity households are the wealthiest households in the nation, and they include mature empty-nesting couples and retirees enjoying lives of luxury. With average incomes well into the six figures, many own spacious suburban homes valued at more than half a million dollars. Most are married, college educated and at the peak of their careers. While nearly 20% are retired, those still in the workforce are holding executive and management positions in business, finance, legal and health services. With their child-rearing days behind them, they enjoy entertaining their friends and pursuing cultural activities.

They like to network with other households on the same social rung, which serves them well in their philanthropic pursuits. These households tend to belong to associations that support museums, symphonies, opera companies and other charities of the arts, and they are among the nation's top supporters of political groups and private foundation organizations. As consumers, they resonate with brands that portray images of honor, integrity and the traditional themes of the American culture. Not surprising, men usually filling a traditional role as head-of-household. They will occasionally use coupons and discount-based incentives.

Many Platinum Prosperity consumers are fitness fanatics who belong to health clubs, enjoy cardio and weight training sports and watch professional tennis, basketball, football and baseball games. At night, they enjoy cultural activities. Plays, ballets, operas, movies and concerts are all on their must-do lists. At home, they've outfitted their family rooms with top-of-the-line computers, large-screen televisions and serious exercise equipment, as well as books. About 35% of the books are read digitally on hand-held devices. They also like to get away from their busy schedules. Platinum Prosperity couples travel for business and pleasure; both domestic and afar. Organized events like cruises are also a fan favorite for these households.

As shoppers, they like to buy brands with reputations that align with the traditional American conventions of pride, integrity, honor and respect. Brands who are also reputable for being high quality, time-saving and fashion or industry-leading also grab the attention of the Platinum Prosperity consumers. When it comes to preferences for interacting with and learning about brands, they prefer brand messages be delivered during their favorite television shows, while enjoying the best of the 1970s and 1980s music stations and apps, in-store and on specialty online retailers, and via direct mail. They are not the most receptive to mobile or online video and display ads, but they are highly receptive to almost every other advertising channel.

Platinum Prosperity households have a strong global consciousness and interest in international affairs. They purchase "green products" and support ethically responsible businesses. With a genuine interest in other people of all backgrounds, they like to learn new things and pursue a healthy, sustainable lifestyle.

To reach these consumers, companies and non-profits should recognize that they are well-educated, global citizens who tend to be independent thinkers. They feel they are informed shoppers and are conservative when it comes to their outlooks on spend. Increasingly, they are going online for news and commerce, reading blogs and informative Websites that help them research products. They not only shop and learn about products online, but they also frequent social media, and stream for online channels and videos. Their mobile usage is more pragmatic and social in nature which is consistent with their average technology adoption.

Aging of Aquarius, Settled | C11 Suburban

Upscale boomer-aged couples living in cities and close-in suburbs

The vanguard of the Baby Boom Generation, Aging of Aquarius is comprised of empty-nesting couples between 50 and 65 years old, and they are quite settled. Most households are married couples; and 90% have no children at home so they are enjoying a kick-back-and-relax life. With their graduate school educations, they earn high incomes at professional and technical positions and often travel for business. Virtually all own older single-family homes in established neighborhoods. Scattered throughout the nation, these households are found in both large metros and mid-sized cities. One sign of their stability is that a large share has resided at the same address for over ten years.

Aging of Aquarius households enjoy active leisure lives. They like to exercise at fitness clubs and do non-aerobic sports such as golf, and yoga. They have a cultured lifestyle and enjoy going to plays, museums and reading books online. They also have enough time and money to travel frequently, both domestically and internationally. With their parenting years behind them, these couples relish the opportunity to take cruises, go to casinos and frequent gourmet restaurants.

As shoppers, these households are responsive to both brands and bargains. They shop all kinds of brick-and-mortar stores, from high-end retailers to discount clubs. They also buy products through catalogs, direct mail, and online. Although they are much more likely to be in the market for a new vehicle than a used one, they are not known as early adopters when it comes to consumer electronics, nor are they fashion-forward. Now approaching retirement age, they are increasingly health-conscious and usually only snack on healthy foods while avoiding the fast food their children may have grown up on. When they shop, they take along coupons clipped from newspapers or downloaded from the internet.

As consumers, these households tend to have eclectic media tastes. They are print fans who read daily newspapers from cover to cover and subscribe to magazines that specialize in business, news and travel. They go online often to track down news, book travel and research medical subjects as well as make purchases. Aging of Aquarius still maintain their love of music, though these one-time rock 'n' rollers now listen to jazz, classical and easy listening music.

No longer the radicals of their youth about forty% of these households are now aligned with the Republican Party, and nearly 35% vote for the Democratic nominee. Although they are split down party lines, only five% are politically aware and make it to the booth on Election Day. They are more liberal regarding environmental issues, however, and donate to "green" causes.

The evolution of the countercultural generation evident in Aging of Aquarius reflects an economic system that has rewarded these households handsomely. Thanks to their high incomes, they've accumulated large portfolios of investments to fund their retirement. With homes they've owned for many years, they are creditworthy prospects for home equity loans, insurance and lines of credit. They carry multiple credit cards and pay off their balances each month.

Upscale retirees and empty-nesters in comfortable communities

About 75% the Golf Carts & Gourmet householders are 65 years of age and better. They are retirees living in relative comfort. Most of these households are married couples without children enjoying active retirements. However, many of these educated residents choose to work past retirement and are earning solid paychecks from professional and technical occupations. With their salaries, pensions and investments, these households report high incomes and they can afford newer homes and townhouses in beachfront retirement resorts.

Golf Carts & Gourmet households feel they have put in their time raising families and working hard and they are ready to enjoy the finer things in life. They like going out to restaurants, plays, classical concerts and casinos. They have the time and money to travel and they especially enjoy taking cruises and visiting friends and relatives around the country. These active seniors try to stay fit by golfing, playing tennis and swimming. Around their homes, they lead quiet lives, including reading books and newspapers, playing cards and cooking for fun.

With their solid incomes, these households like to frequent malls and shop at reputable department stores like Nordstrom and Dillard's. These traditionalists buy clothes that are conservative and high-quality. However, they also like their possessions to make a statement, and they seek out designer labels to convey a sense of status. While they care about having a healthy diet, they also consider themselves foodies who like foreign foods and spicy dishes, especially if served in an artistic way.

These maturing households will always be fans of traditional media. They read newspapers from cover to cover and subscribe to venerable magazines that cover travel, sports, business and senior topics. They tune in to the radio for news and music, especially stations that play easy listening and golden oldies of the 1960s and 70s. They consider television their favorite form of entertainment, preferring movies, dramas and how-to programs. By contrast, they are still a little nervous around newer media sites offering movies and music. They'll go online for news and information, and particularly stock quotes, medical research, and map directions. However, these households do not download music, watch video streams, or participate in online gaming. Streaming television and radio stations are not recommended for brand messaging targeted at these households.

Golf Carts & Gourmet households are more of a conservative bastion on political issues as well. They describe themselves as people of faith who attend religious services. A majority belong to the Republican Party despite some pockets of liberals and Independents. Many have a global awareness and give generously to health, educational and cultural groups.

However, that philanthropy is tempered by a fiscal conservatism. These households have amassed large nest eggs and are typically drawing down their retirement accounts. In order to maintain their comfortable standard of living, they carry plenty of insurance and umbrella coverage to protect their substantial assets.

Comfortably established baby boomer couples in town & country communities

Far from the major population centers, Unspoiled Splendor live in small cities, villages, and subdivisions where farms once dominated the landscape. Today, about 35% of the adults still work in a blue-collar setting while most hold mid-level jobs in sales and white-collar professions. These baby-boomer couples tend to be high-school educated; some attended college. With most of their children grown and out of the house, both parents are typically in the workforce with their combined middle-incomes. Many live in homes built on large lots in moderate communities. Although these households are scattered around the country, almost half can be found in the Midwest and Western states.

In their remote areas, Unspoiled Splendor households appreciate the traditional hobbies and activities associated with a more relaxed, rural lifestyle. Around their houses, they like to garden and bird watch. Their idea of a social outing is a trip to the state fair, antique show, or country music festival. They are outdoorsy households who like to fish, hunt and ride horses. When they travel they are fond of pitching a tent and breathing in the fresh air at a national park or recreational campsite.

Thanks to a conservative financial style, these households have built up decent investment portfolios and a comfortable nest egg for their impending retirements. However, while they have money in their pockets, they are reluctant to spend much of it on aspirational purchases. When they do, shopping online seems to work for them. They buy utilitarian trucks that are made in America, and will they favor anything that can survive the rough roads of their off-the-beaten-track communities.

For advertisers, Unspoiled Splendor households read the daily newspaper and pick up a magazine targeted to a country lifestyle. They are also receptive to learning about brands while watching television, listening to the radio and going to their postal mailbox. In many respects, they are true traditionalists. This market has a good mix of both social conservatives as well as liberal values. They are concerned about pollution, recycling or threats to their health and generally take some actions one might consider "green". They have deep roots in their communities and care about their neighbors. Many support a variety of charities, volunteer for different groups and serve as community leaders. They describe themselves as spiritual and passionate in their opinions.

Older empty-nesting couples and singles enjoying relaxed lives in satellite cities

Booming & Consuming households are older couples and widowed individuals who have migrated to small cities and villages, seeking a more relaxed pace of life. With most of these households between 50 and 75 years old, their nests are empty and they are soon to be, or already, enjoying their retirements. Booming and Consuming tend to have average educations and, for those still in the workforce, have jobs in a mix of white-collar, blue-collar and service sector positions. Their moderate incomes typically allow them to afford to own a recently-built ranch with a well-landscaped yard in a Sun Belt community. With their children grown and out of the house, these mature adults have crafted a cushy lifestyle that's heavy on recreation and leisure.

The lack of children to nurture and clothe means more disposable income for travel and outdoor activities. These households are big on heading to nearby parks and woodlands to bike and walk through the outdoor scenery. They enjoy long car trips, cruises and a significant number own recreational vehicles for scenic vacations. They may not live close to downtown centers, but they've carried their enthusiasm for culture with them and will drive to a city to attend a play or concert. For a splurge, they'll go to an antique show.

With their moderate incomes and healthy savings accounts, they can afford to be materialistic. However, these consumers have little need for status recognition and prefer to focus on the integrity of the brand and the customer service when shopping. Booming and Consuming typically shop discount department stores. Many are interested in home décor as well as electronic furnishings like flat-screen televisions.

With its mix of adults still working and those already retired, values in Booming & Consuming are wide-ranging. Their relative open-mindedness is a reflection of their generation and life experiences. Although the highest concentration is conservative, voting for the Republican Party, many also espouse liberal views. Reflecting the pristine surroundings of their community, everyone seems to agree on the value of recycling to help protect the environment. Additionally, many are active in community affairs; they support arts, health and environmental groups.

While they may have moved to secluded suburban settings, Booming & Consuming like to stay current with main-stream culture. They typically read a daily newspaper and subscribe to magazines like The New Yorker and Entertainment Weekly. They have eclectic music tastes that include country, 1960s and 1970s hits, and jazz; and they will tune in to news talk radio to keep up with the issues of the day. These older households have only somewhat embraced the internet and go online to shop, get the latest headlines and download information like stock reports. Few use email regularly though, remaining much more receptive to direct mail offerings. Use messaging that aims at the "buy American" consumer; one that exemplifies honest quality products that can only be made in the USA. Doing so typically works better than attempts to incentivize or appear to be the iconic trendy option.

Mix of Generation X and Generation Y households living digital-driven, urban lifestyles

With the first wave of digitally focused consumers are now in their twenties and early thirties, and many have begun to leave the nest and start independent lives and families. That's the story of Digital Dependents households, with nine out of ten under 35 years old. They include a mix of married couples and singles, some having children, with a majority having gone to college. Many hold jobs in blue-collar sales and entry-level positions, providing modest incomes that let them live in primarily single family homes. Most have settled in second-tier cities and suburbs across the country, but they show little intention to stay for any length of time. These households are newer homeowners and renters with more than 65% having lived at the same address for fewer than three years.

Having grown up with ubiquitous telecommunications, these individuals revel in multitasking lifestyles that allow them to bounce between cell phones, other hand-held devices, laptops, and video games. They are into athletics, whether it's playing basketball, working out by lifting weights or taking a yoga class. They have active social lives, going out to bars, theaters, cinemas, and billiard halls. If they stay in, it's typically to go online or play a video game. There's not a gaming console sold in America that they don't own at greater than the national average.

In the marketplace, Digital Dependent households have champagne tastes moderate budgets. They follow the fashion magazines to check out the latest styles, but they typically go to discount clothiers or the clearance racks in more upscale shops. Over 50% are getting by without cards. Those who can afford a car tend to buy or lease inexpensive subcompacts, and they like imports for the cachet of a foreign brand. Where they won't compromise is on electronics. As the first generation born into the digital media age, these households are early tech adopters who want the latest wireless devices that will support their lifestyle of constant motion. While they have little interest in buying through catalogues, and automatically choose online sites to buy consumer electronics, toys, and books. When it comes to electronics, their friends come to them for advice on what's hot and what's not.

With so much of their free time spent online, Digital Dependents have drastically cut back on more traditional media. It's hard to find a member who subscribes to a newspaper or more than a couple of magazines. They will listen to the radio, mostly through internet apps, and seek out steaming sites for hip-hop, rhythm and blues, and pop music. They will also watch late-night television programs for comedy, music, and movies, but usually after a workout or social outing.

Advertisers will have a hard time connecting with them through traditional media. Instead, use mobile and online video and display to reach this market. Addressable television is another viable option as Digital Dependents are receptive to learning about brands in this channel.

With the world handed to them on a digital device, Digital Dependents have developed progressive attitudes and a global conscious. They tend to be liberals who support the Democratic agenda. They are constantly striving for more out of life, including better careers, the latest fashions, and the newest gaming consoles. These unattached individuals are still looking to find the perfect mate, and they place a lot of stock in their appearance.

Reaping Some Rewards | Q62 Suburban

Relaxed, retired couples and individuals in suburban homes living quiet lives

Reaping Some Rewards include head-of-householders who are 65 years or better, and no longer in the workforce. As householders in the Greatest Generation, they grew up during the Depression and World War II, typically married young, and then thrived in the workplace in the latter half of the 20th century. These hardy seniors are now a mix of elderly couples and widowed individuals, and they are reaping the rewards of their many years of work, while staying settled in quiet subdivisions. They are living reasonably well on decent pensions and investments.

They have done very well in managing their investments with their lower middle-income incomes. With reduced living expenses, some can afford to own a comfortable cottage or ranch houses priced above the market average. Some moved to their homes in mixed-age communities about a decade ago, after their children had finally left home and they could retire with some financial security. They are not fans of active retirement communities, and prefer vibrant cities with access to transportation hubs and top-flight hospitals.

Reaping Some Rewards are not about working up a sweat. They engage in a lot of indoor activities, including watching television and listening to classical music as well as pursuing hobbies like needlework and playing cards. They also like to go out on the town; they frequent restaurants and try their luck at casinos and bingo parlors. They have the disposable cash to dine out regularly, showing a fondness for casual restaurants. After a lifetime of labor, they now enjoy traveling, take overseas cruises, and tour the nation with recreational vehicles.

Reaping Some Reward households have the money to shop, but they find little joy in consumption. They are brand-loyal traditionalists and prefer to buy tried-and-true styles at stores that are familiar. They are regulars at mall retailers and traditional anchor stores, and they will browse before buying the classics in apparel. While they are admittedly tech-shy and own few consumer gadgets, they like cars that are equipped with all the latest options, and especially new luxury sedans.

These households are also brand-loyal when it comes to media. They still read a newspaper from cover to cover every day. These well-read households read magazines, and subscribe to a variety of steadfast publications like Reader's Digest, People, and Time magazine. Many keep their televisions on all day for a comforting audio backdrop to their routine. Regarding television as their main source of news and entertainment, they like to tune in to newscasts, talk shows, game shows and historical programs. Late-adopters when it comes to the internet, they rarely go online for shopping or banking. However, they will do more age-specific activities online, like researching various ailments and maladies and making travel arrangements to visit their grandchildren.

The values system of Reaping Some Rewards reflects old-fashioned traditions. They are religious households who express their faith by going to church and synagogue as well as watching religious television shows. Risk-averse, they buy a lot of insurance products. They tend to vote Republican and are active in their communities. These households are charitable, giving to nearly every kind of not-for-profit, including religious, health, political, environmental and arts groups.

Original narrative by Experian Decision Analytics with refinements by LandUseUSA | Urban Strategies, with all rights reserved © 2019.

Town Elders & Leaders | Q64 Small Cities

Wise seniors and community leaders living stable, minimalist, and pragmatic lives

Town Elders & Leaders are older retirees, including a mix of widowed individuals and empty-nesting couples scattered around the country. All are over 65 years of age or better, and almost 80% are retired. Many have aged in place, living in the original ranch houses and ramblers that they bought more than 25 years ago. These are stable and established households with low movership rates and moderate lifestyles. Incomes and investment balances are low, but so are expenses. Many of these seniors say that they are happy with their standard of living.

Town Elders & Leaders are cultivating home-centered lifestyles. They spend a lot of time reading books, gardening, doing needlework and generally puttering around their homes. They have time to enjoy hobbies like coin collecting and bird-watching. They don't eat out much except for the occasional outing to an ice cream parlor for a treat. There's not a lot of money for nightlife and travel. Instead, their social lives revolve around their local church and veterans' club, where they enjoy the camaraderie and bingo games. When they do travel to visit friends and family, most of them will drive. They typically drive sedans or pickup trucks, and more than half of them own at least one vehicle.

Town Elders & Leaders aren't big on shopping; it's too tiring for some. Many like the convenience of nearby local stores and retailers where they can find their favorite brands. They typically choose comfort over style, and shop both discount and mid-market mall retailers. These consumers carry credit cards for moderate chain department stores and a large share like learning about new purchase opportunities from traditional media like direct mail. With a large share having served in the Armed Forces, these households are patriotic in the marketplace. When they can, they buy products made in America.

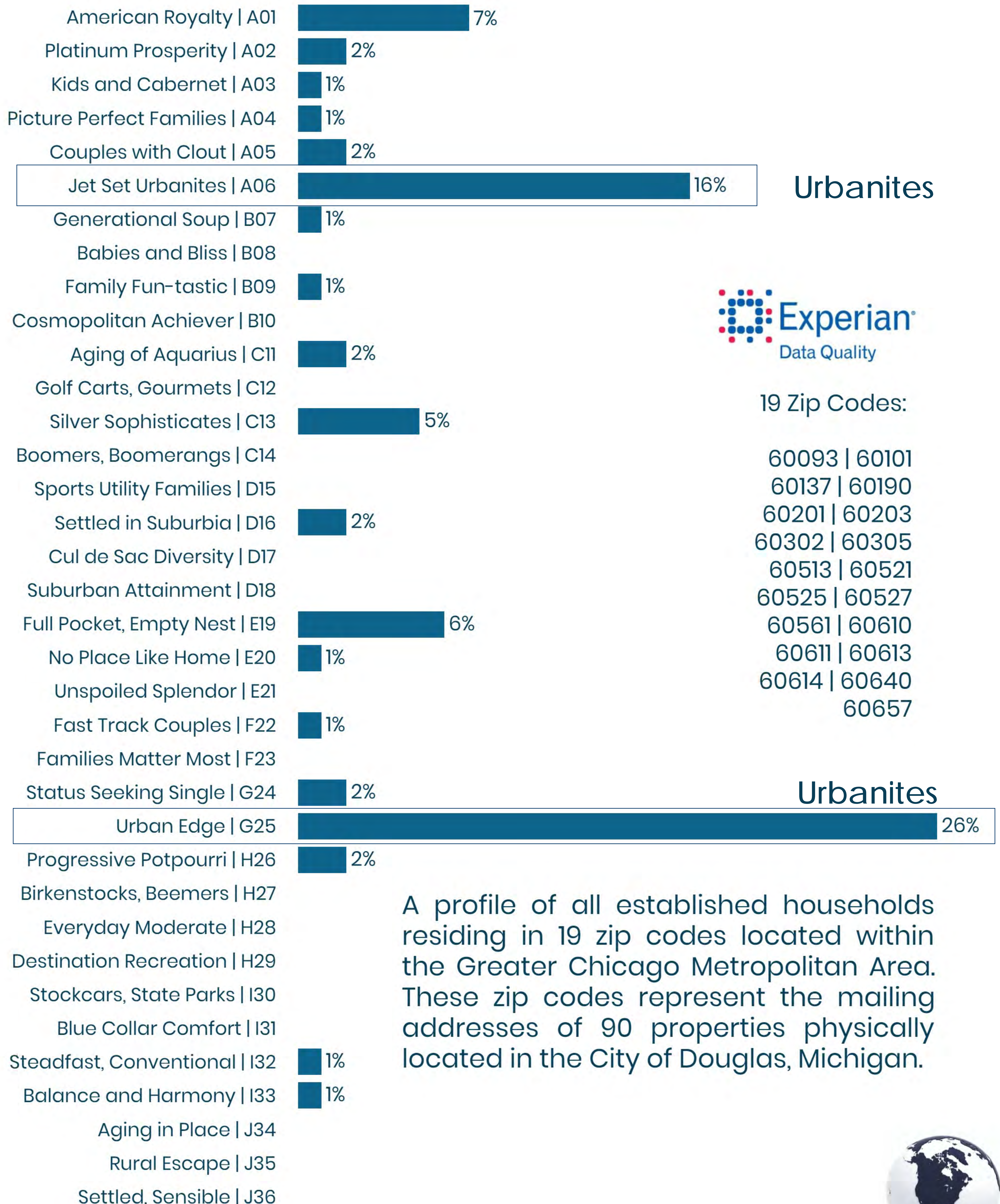
Town Elders & Leaders are traditional media fans. They get a daily newspaper, subscribe to a number of magazines on hunting and fishing, home economics, and gardening; and they watch television throughout the day. They particularly enjoy movies, documentaries and game shows, and they are more likely to tune in to re-runs on classical movies, series, and shows. The internet has made few inroads among these households. They mostly use the internet to send e-greetings and research health information; and the AARP website is especially popular with these households.

Town Elders & Leaders are traditional, care about their family and cultivate their faith. They espouse conservative political beliefs and support conservative social issues. They like spending time with their family, going to church on Sunday and enjoying the simple things in life. Having lived at the same address for decades, they have deep roots in the community. Even if an issue doesn't affect them personally, they are willing to volunteer for a good cause.

Original narrative by Experian Decision Analytics with refinements by LandUseUSA | Urban Strategies, with all rights reserved © 2019.

1-36 Lifestyle Clusters | Metro Chicago IL

Owners of 90 properties located in Douglas, but mailing addresses in Metro Chicago.



Affluent singles and couples living high-rise fashionable lives and with a big city-style

Jet Set Urbanites are metropolitan sophisticates and an affluent mix of singles and couples pursuing high-rise lifestyles. These residents, mostly childless mid-aged professionals, have graduate degrees and high incomes from offices with a view. Their careers are in business, finance, legal and health. They pay plenty to live in the luxurious apartments and condos in some of the country's priciest cities like New York, Chicago and San Francisco.

Jet Set Urbanites take advantage of their urban landscape. They are performing arts fans who frequent the theater, dance performances and a range of musical concerts. They like nightlife and enjoy going to comedy clubs, movies and ethnic restaurants. These workaholics try to stay fit, by working out in gyms and private clubs where they do aerobics, cardio and weights. They like to take clients and dates to sports events, particularly professional basketball games. To get away from it all, they routinely travel to foreign settings where they enjoy museums, restaurants and exclusive hotels.

As shoppers, Jet Set Urbanites are not inclined to shop or present themselves as Fashionistas. They do not frequent department stores, preferring more intimate and upscale specialty shops. Because many lack cars, they tend to shop online. They own stocks and mutual funds. Philanthropic and progressive, they support a range of non-profit groups and are generous with their money, especially for charities involved with health issues, welfare, the arts, education and public broadcasting.

Jet Set Urbanites are classic urban liberals, although 25% are not registered to vote. They are overwhelmingly Democratic in their political affiliation, and they support a progressive social agenda. They describe themselves as risk-takers who like to sample new products and fashion, experimenting with different styles and exotic cuisines, yet they rank high as conformists who stick to the status quo. They have enough money to indulge their tastes, and they don't mind paying for high-quality brands. However, they also care about environmental issues, and they tend to recycle, buy organic foods and look for smart green products.

Jet Set Urbanites are especially reachable. These educated households remain big fans of newspapers and magazines, particularly for the coverage of news, business, fashion and travel. They tune in to radio apps and stations every day for news, news/talk programming and for the occasional Pop or R&B fix. They are especially a receptive Addressable television market with 80% preferring to learn about brands during their broadcast television programs or while streaming movies and shows online. And when it comes to mobile and online display ads, this audience is increasingly paying attention and appreciating those timely brand offerings.

To resonate with these households, use messages that appeal to their impulsive spending habits as well as their inability to pass up something novel or that emanates their ideals for a smaller carbon footprint.

Original narrative by Experian Decision Analytics with refinements by LandUseUSA | Urban Strategies, with all rights reserved © 2019.

Younger, up-and-coming singles, big city lifestyles located in urban neighborhoods

Urban Edge households tend to be unmarried single Millennials living in the funky neighborhoods of the nation's larger cities. Found in iconic urban neighborhoods in metro cities, they thrive in settings known for their cafes, nightclubs, and cultural arts venues. Most are college educated, in their 20s, and living in lofts and urban apartments. They can afford luxury lofts in gentrified buildings, supported by good-paying jobs in business, sales, the arts, and public policy. However, most care less about their residences than their locations near great ethnic restaurants, hip boutiques, trendy music clubs, and other like-minded singles.

Urban Edge households enjoy being on the cutting edge of culture and enjoy the energy only city life can bring. They head out to plays, movies and concerts. They like to read books and take continuing education courses. To keep looking their best, they devote hours each week to keeping fit. They are not just denizens of local health clubs; they adopt and are the first to try the newest in health food trends. During the week, they'll show up for drinks or dinner toting a gym bag and briefcase.

Not surprisingly, these households are liberal in their outlook. They tend to vote Democratic and proudly support a left-wing agenda. They do not conform to the expectation that they should attend weekly church services.

Urban Edge households are fashion-forward shoppers. They shop local boutiques and national chains alike. They are likely to drive an hour to find a new style to adopt, especially if a brand engages them with an incentive. Despite living in some of the nation's most expensive cities, they still like to keep within a budget and don't expect to spend more on household essentials or big ticket items this coming year. Thus knowing what makes them tick is even more important for marketers. Many Urban Edge consumers are somewhat financially savvy and have some type of investment. Over 75% of these households have a credit card.

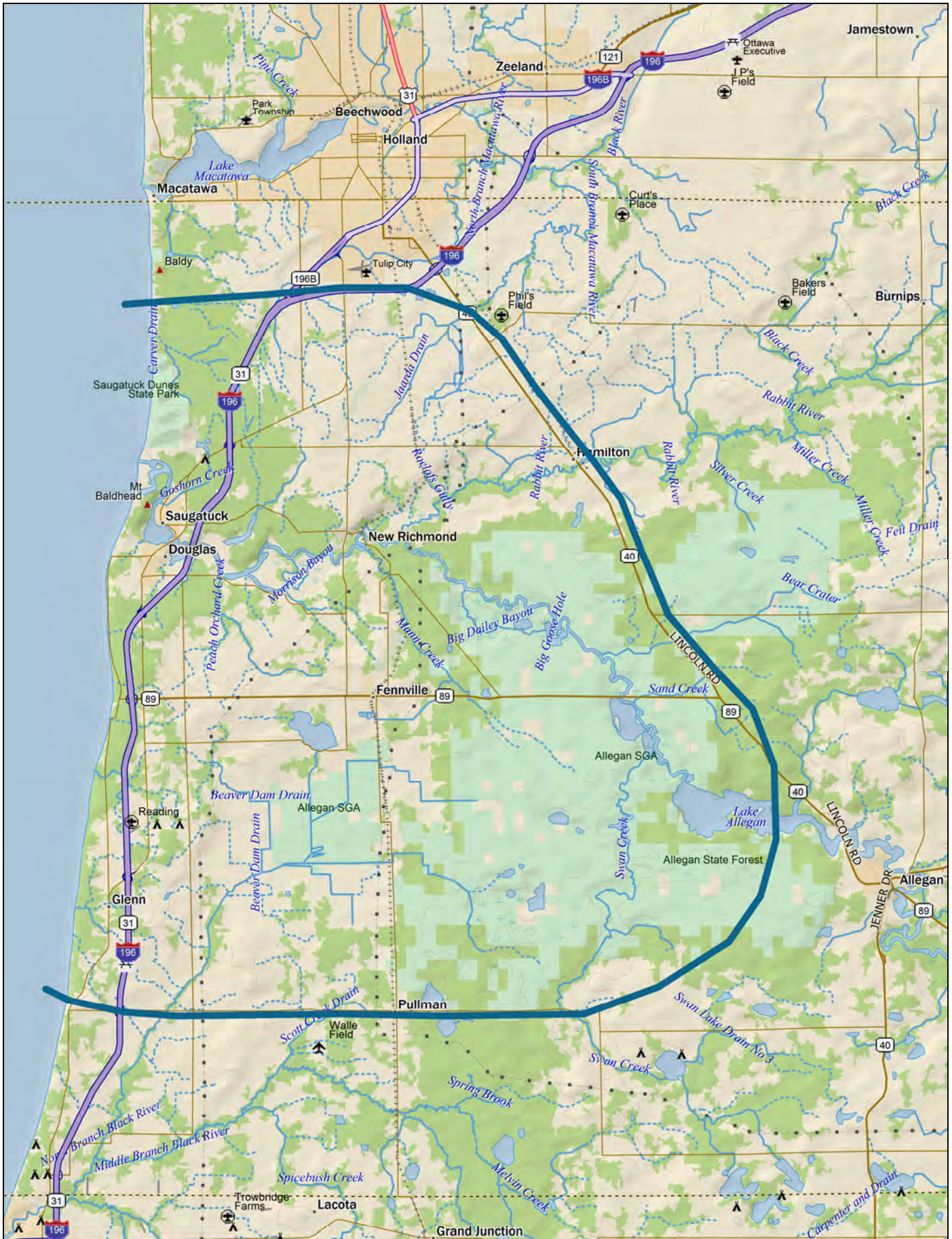
Urban Edge consumers make great Omni-channel audiences. They prefer learning about brands overwhelmingly while streaming or watching television. Internet radio streaming apps are another way to successfully engage these Millennial households. Mobile and online displays are also preferred means of engaging with brands, as well as trendy offering by email.

Original narrative by Experian Decision Analytics with refinements by LandUseUSA | Urban Strategies, with all rights reserved © 2019.

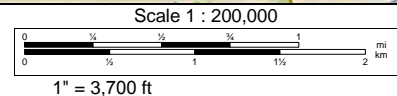
section **h**

Market Parameters

50% Primary Trade Area (50% Visitor Import) The Cities of Douglas and Saugatuck, Michigan | 2020

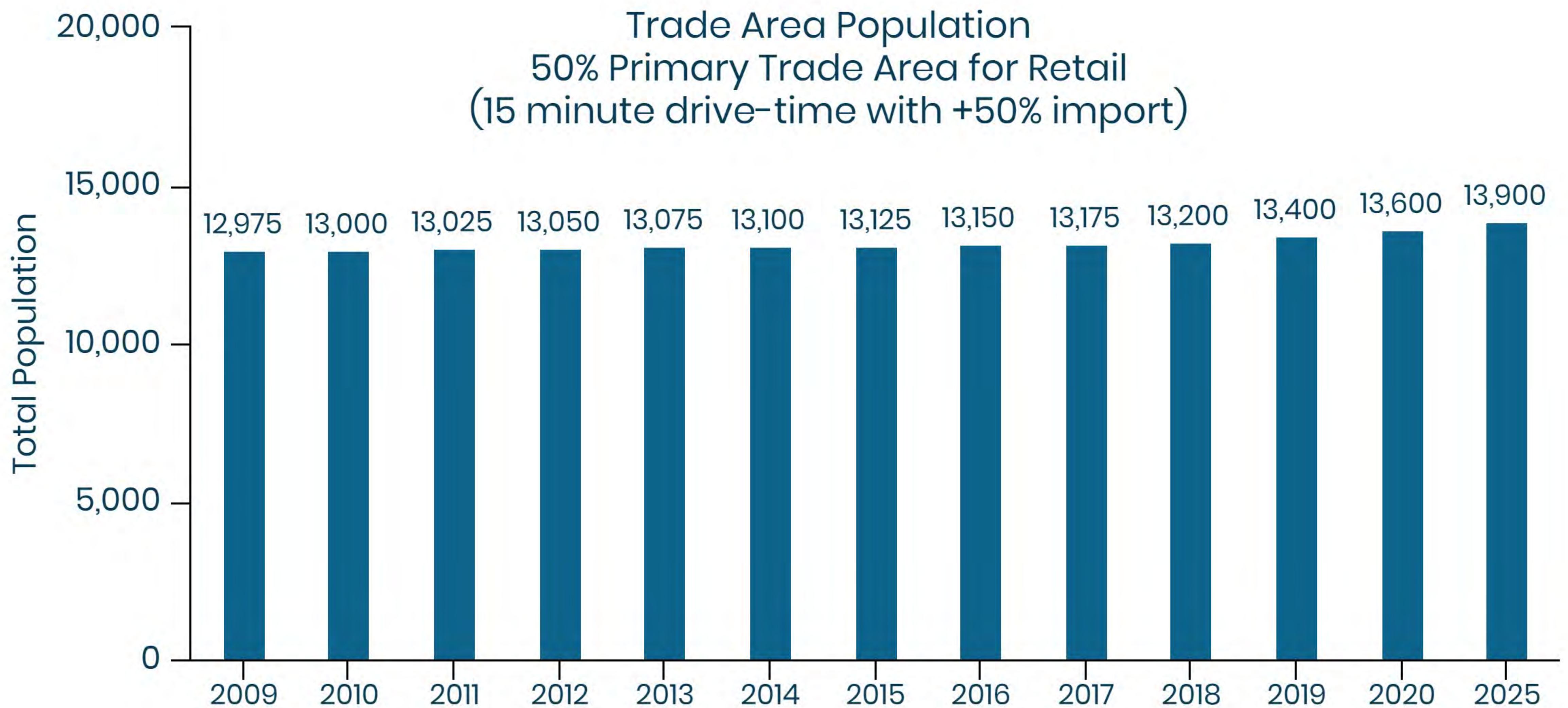
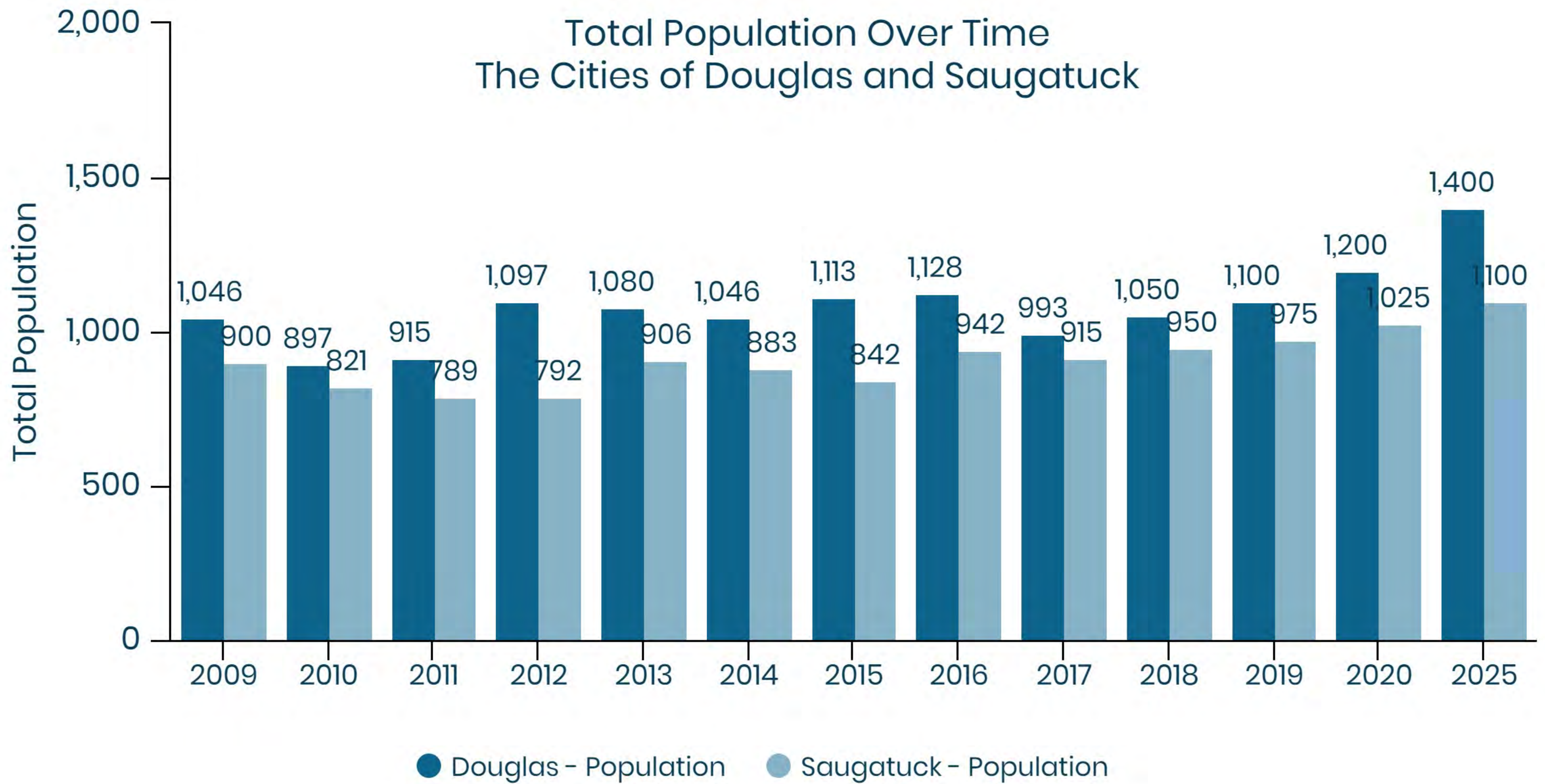


Underlying map licensed from Delorme; trade area delineation, forecasts, and exhibit prepared by LandUseUSA | Urban Strategies (c) on behalf of the City of Douglas, 2019.



Trade Area Population | Douglas

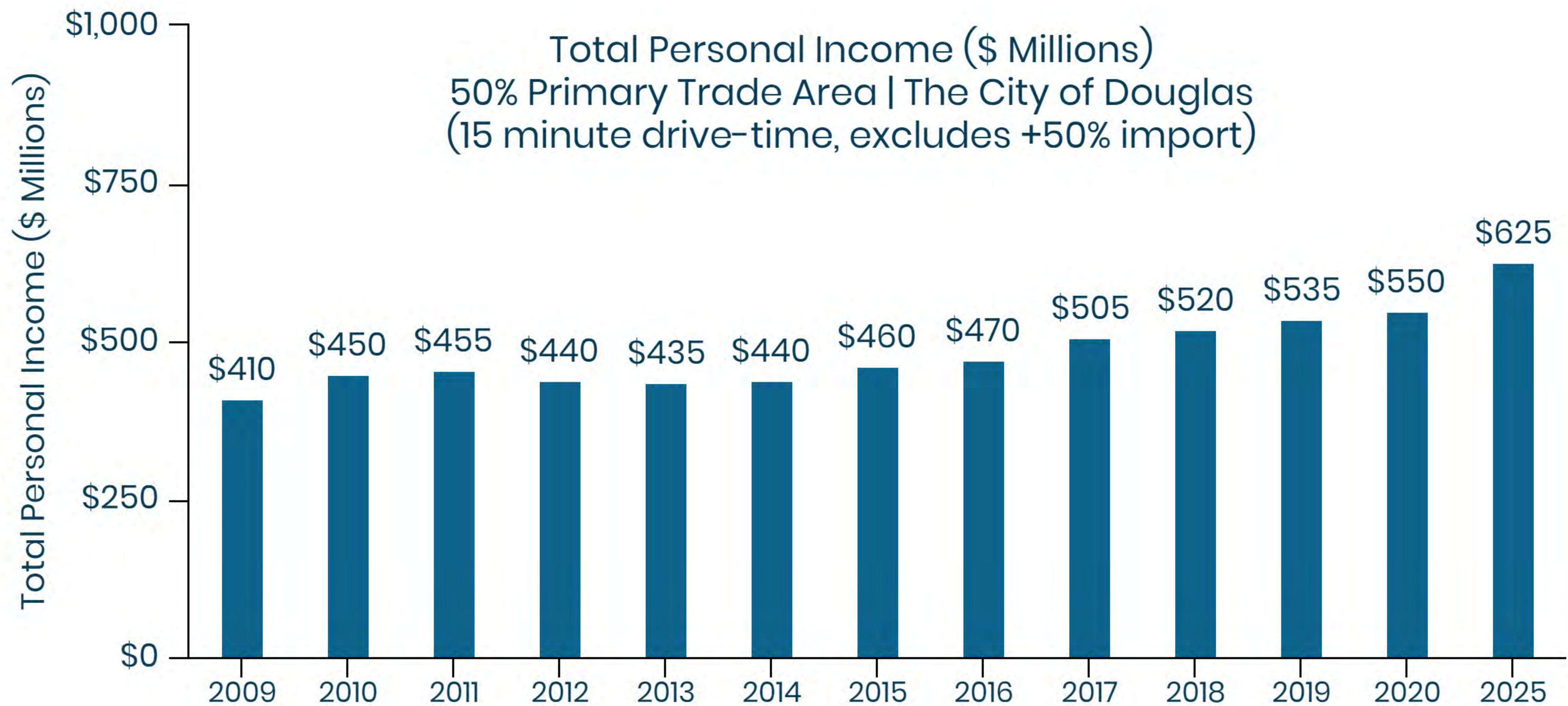
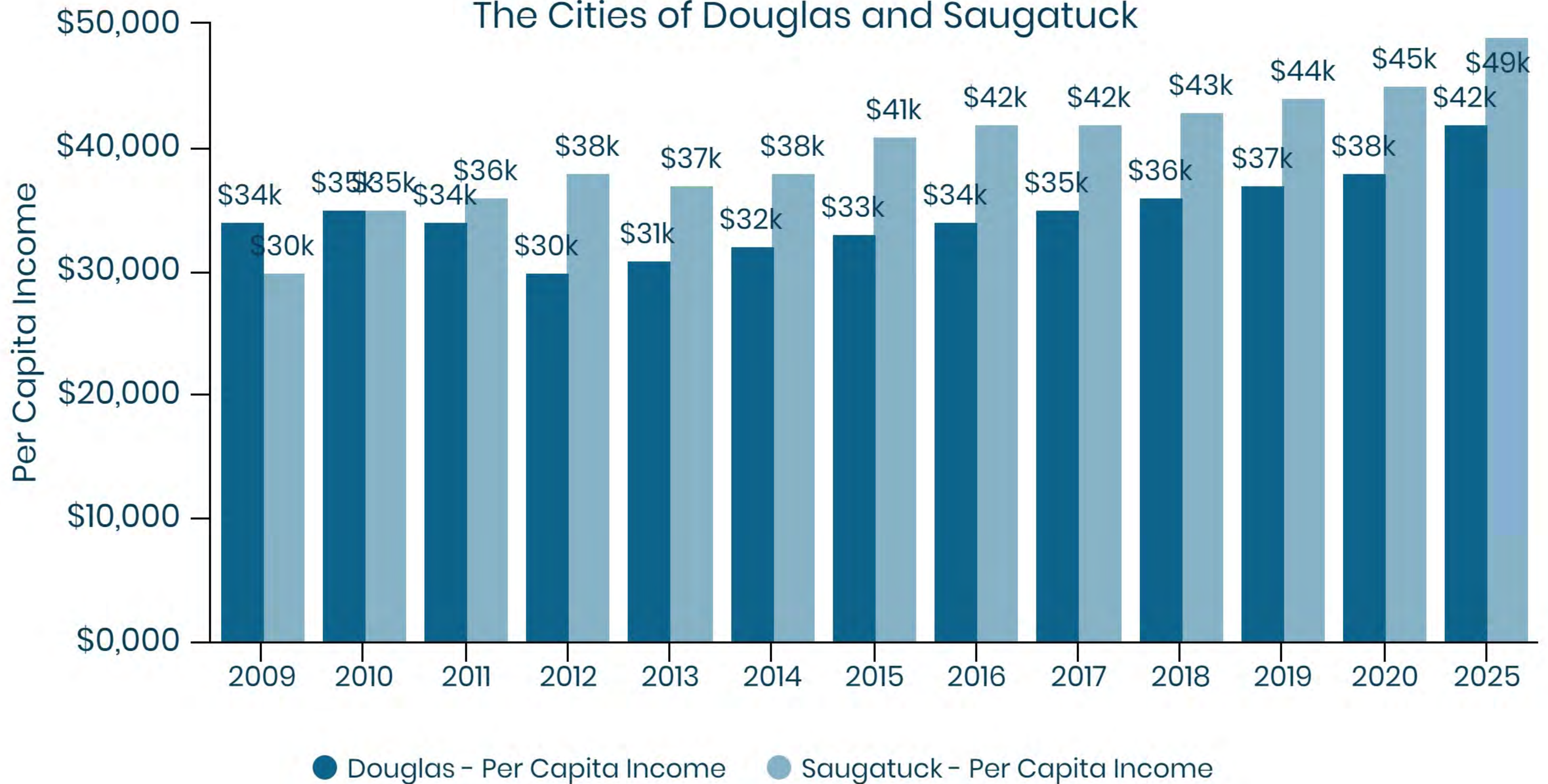
Population is used to compute resident expenditure potential for retail sales.



Total Personal Income | Douglas

Income is used to compute resident expenditure potential for retail sales.

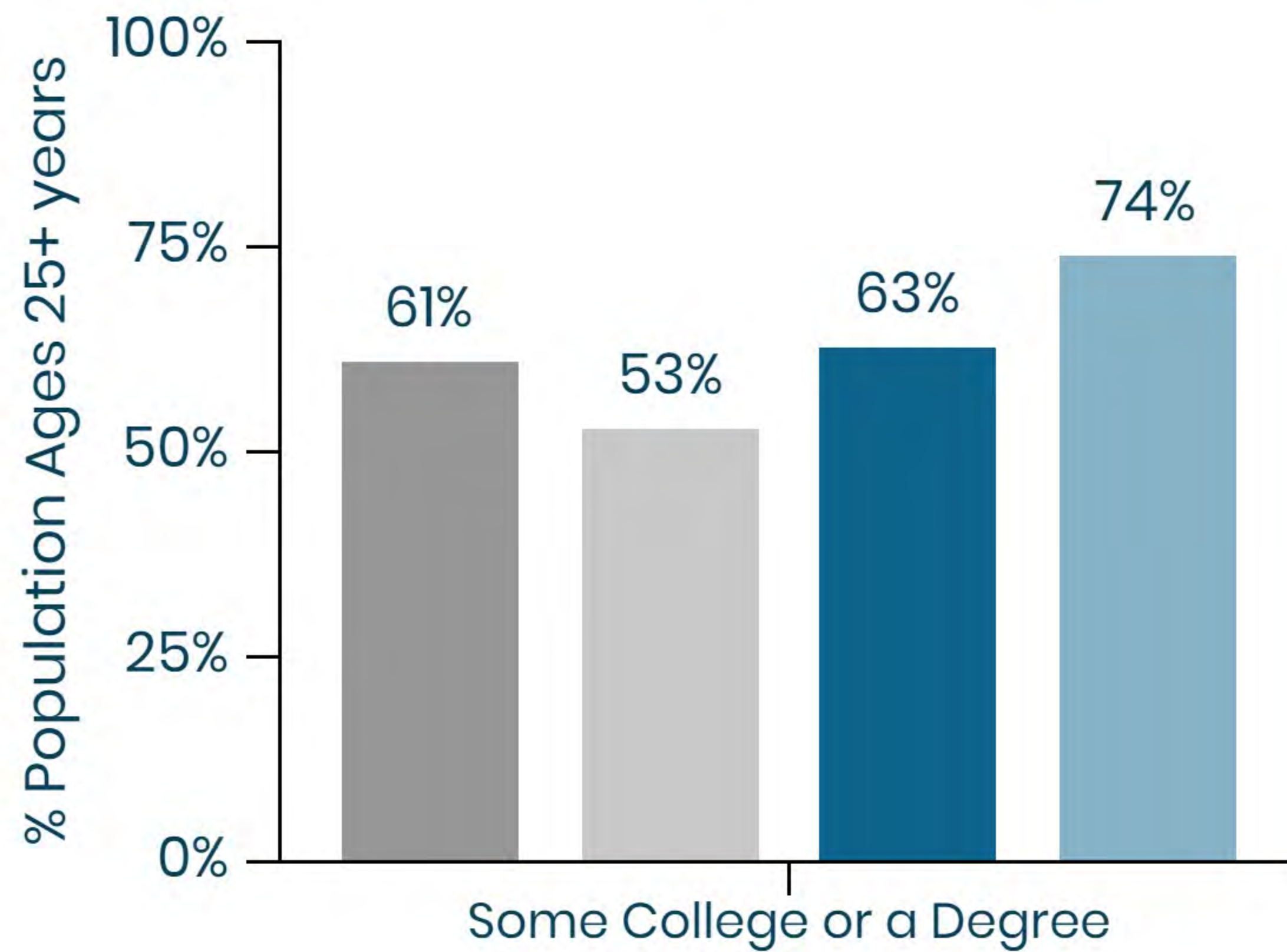
Per Capita Income Over Time
The Cities of Douglas and Saugatuck



Education, Occupation & Cars | Douglas

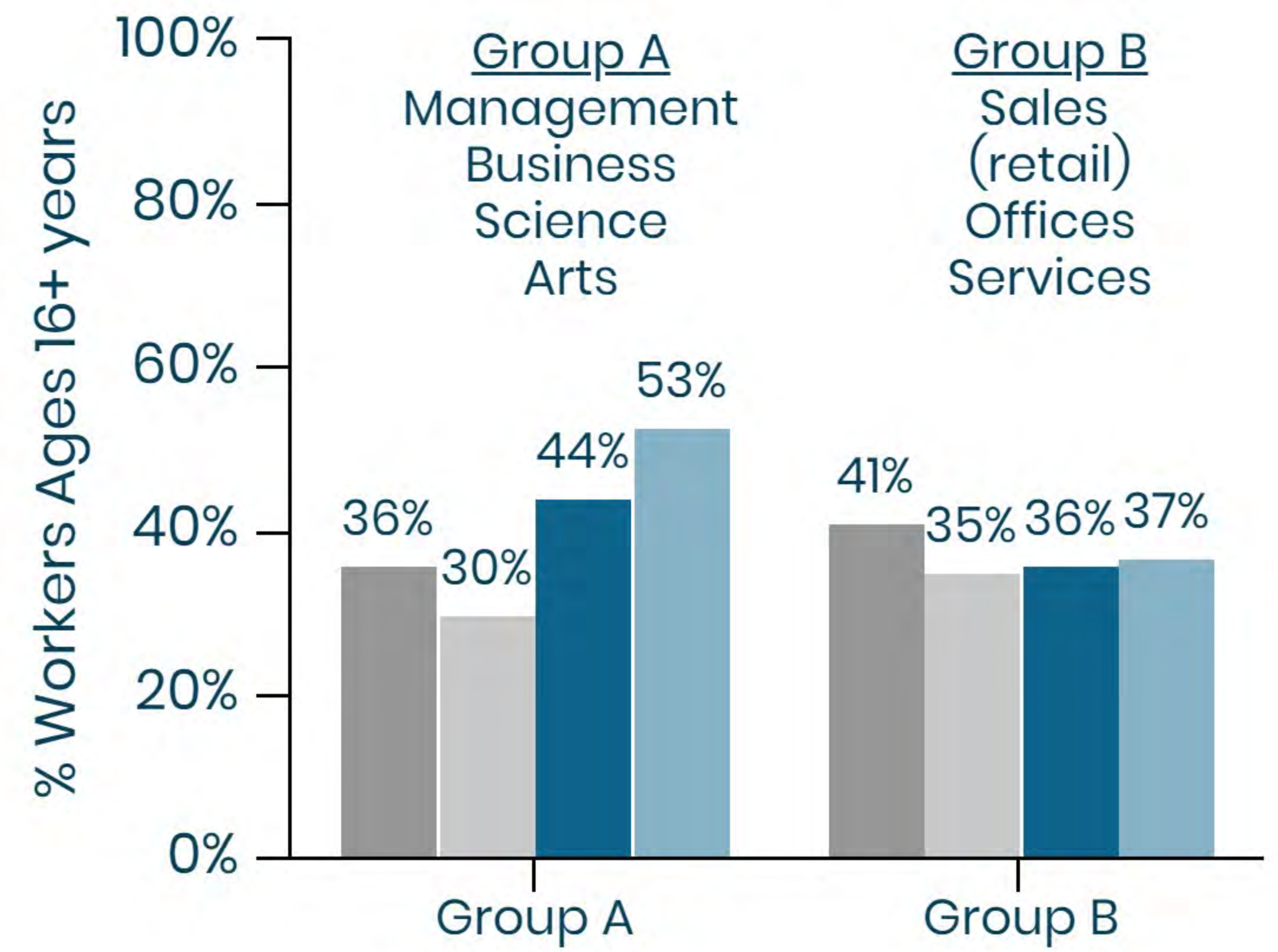
Educational attainment, white collar occupations, and automotive use.

Some College or a Degree



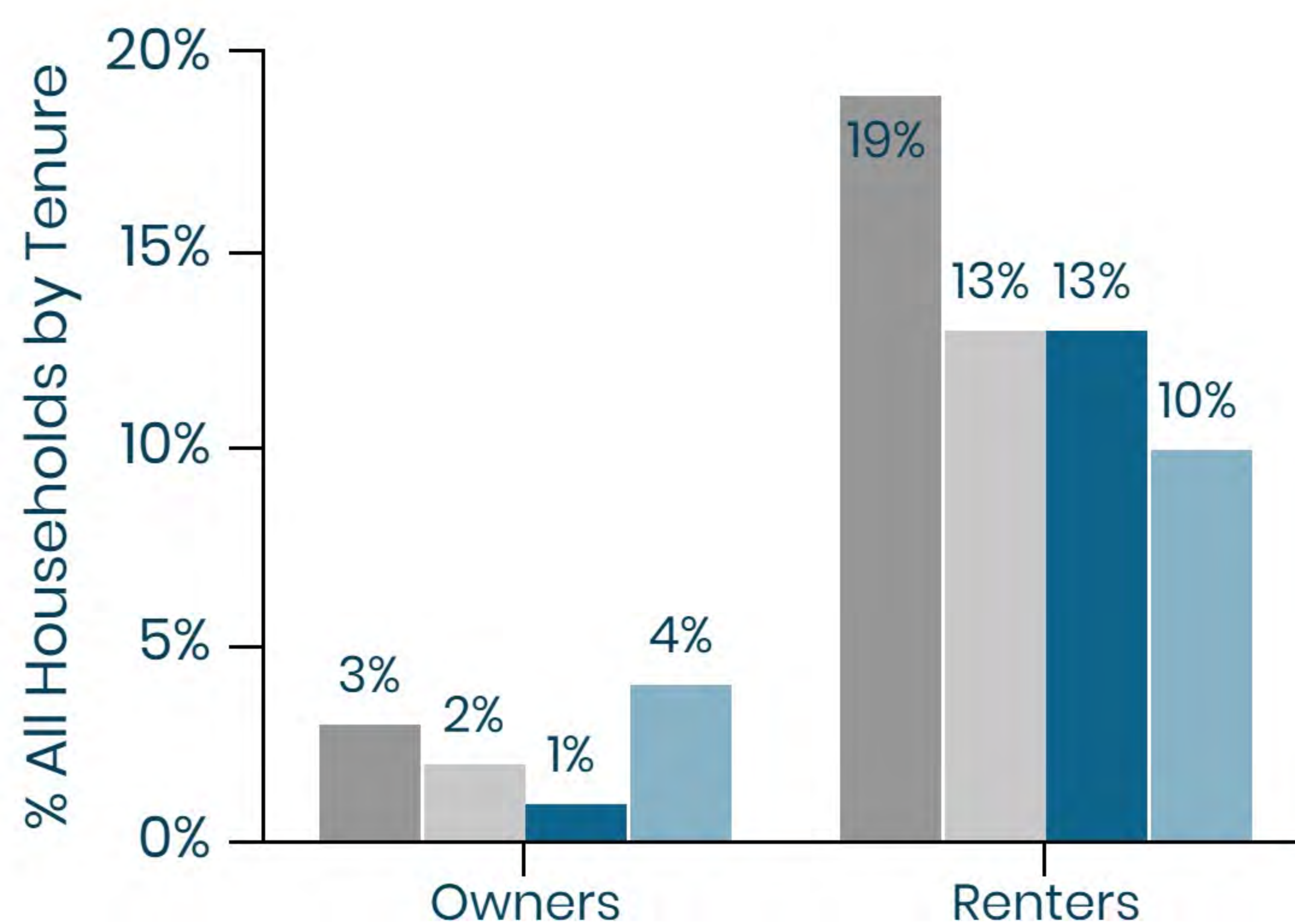
● MICH ● Allegan Co. ● Douglas ● Saugatuck

Employment by Occupation



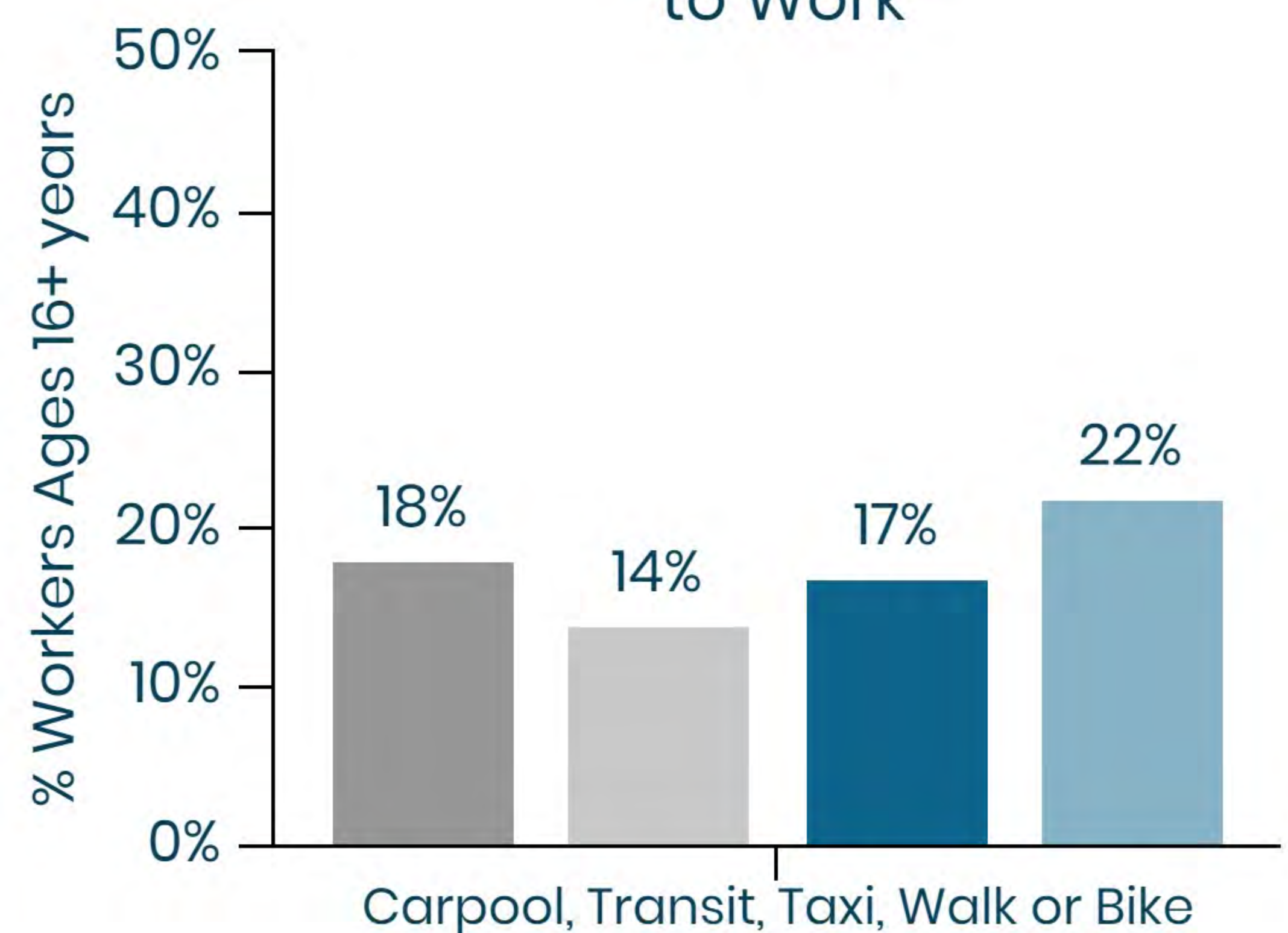
● MICH ● Allegan Co. ● Douglas ● Saugatuck

Getting by Without a Car



● MICH ● Allegan Co. ● Douglas ● Saugatuck

Alternative Mode of Travel to Work

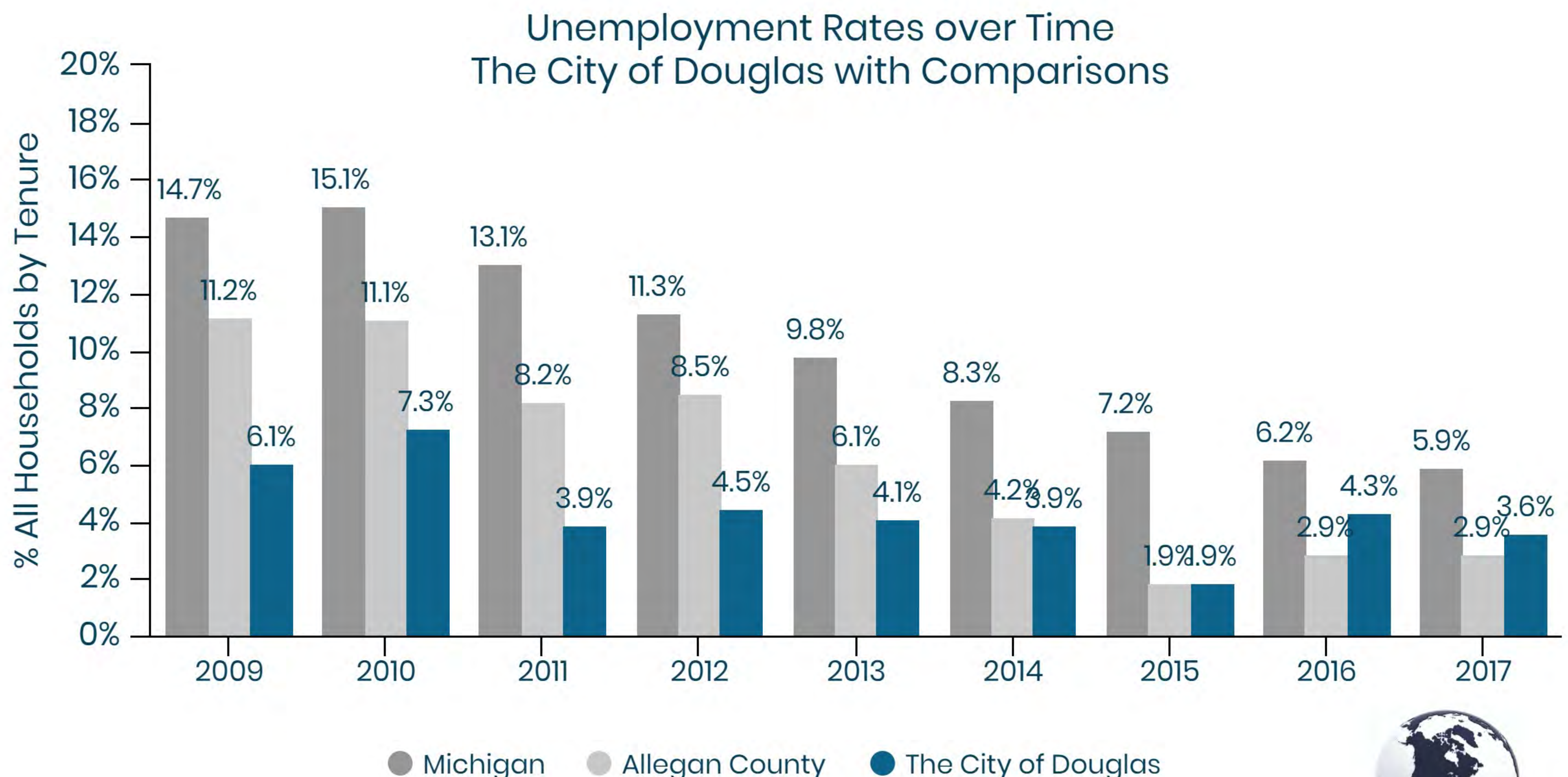
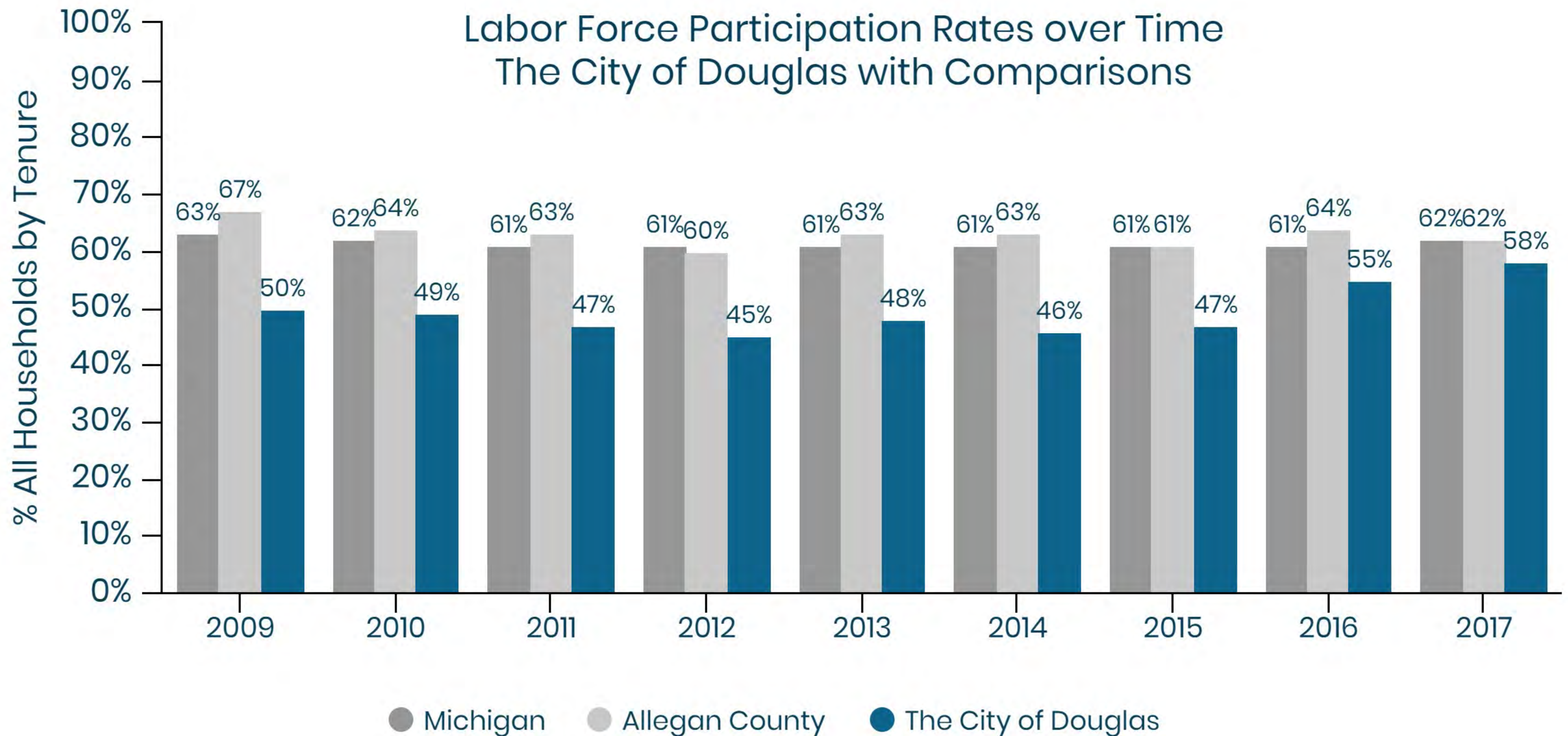


● MICH ● Allegan Co. ● Douglas ● Saugatuck



Labor Force and Employment | Douglas

A comparison of labor force participation and unemployment rates over time.



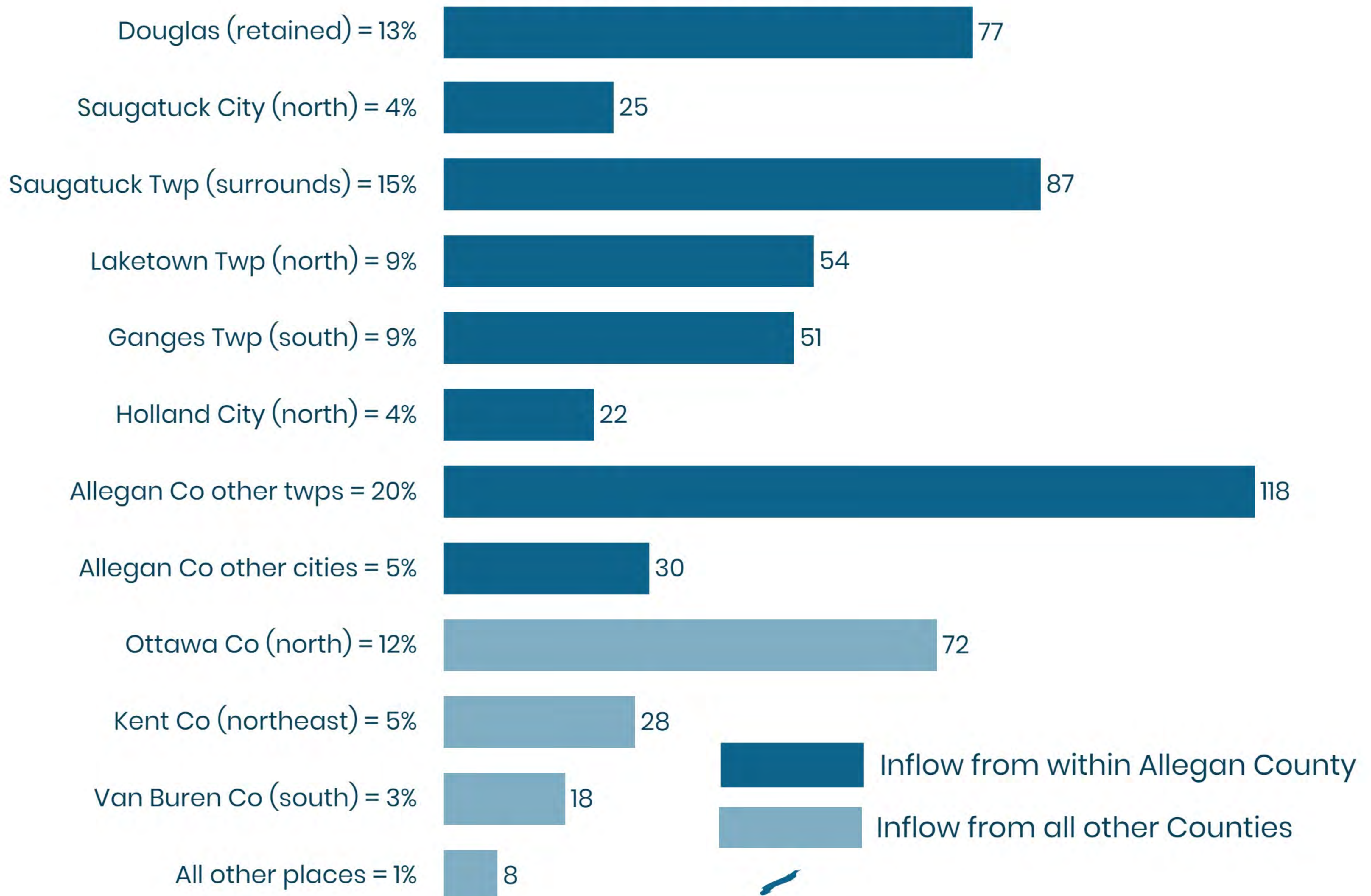
Underlying data by the American Community Survey with one year estimates through the year 2017.
Analysis & exhibit prepared by LandUseUSA | Urban Strategies © on behalf of the City of Douglas, 2019.

LandUseUSA
UrbanStrategies

Inflow of Daytime Workers | Douglas

The sources of workers commuting into the city each day, unadjusted for outflow.

Share and Number of Daytime Workers



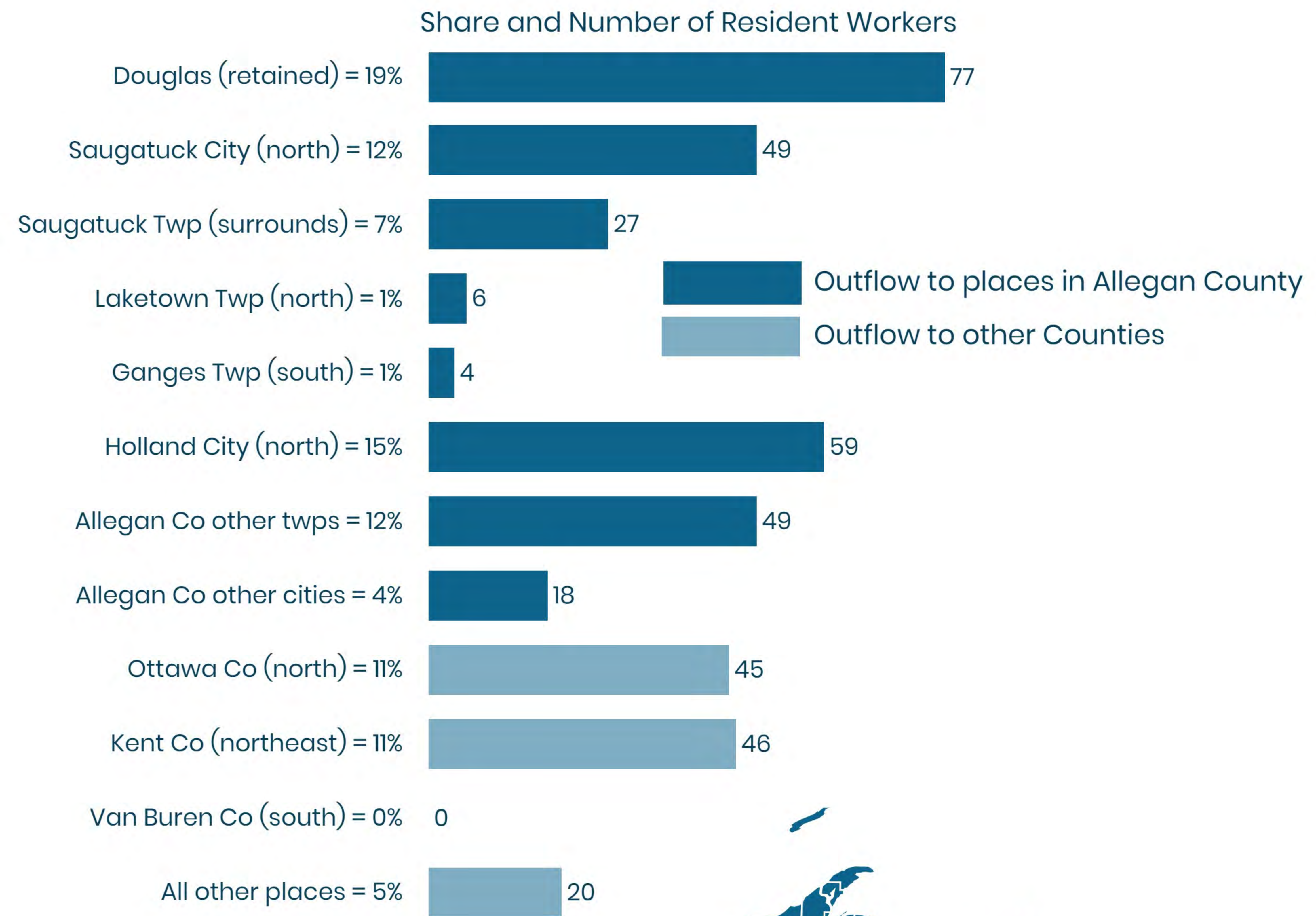
The City of Douglas is located in Allegan County, which is in Southwest Michigan. The city has a net daily inflow of +190 workers, representing 32% of its total daytime workers. In general, its residents are willing to drive farther out for jobs; whereas its daytime workers tend to live relatively close.

Total Inflow = 590
 Total Outflow = 400
 Net Inflow = +190
 Net Inflow = +32%



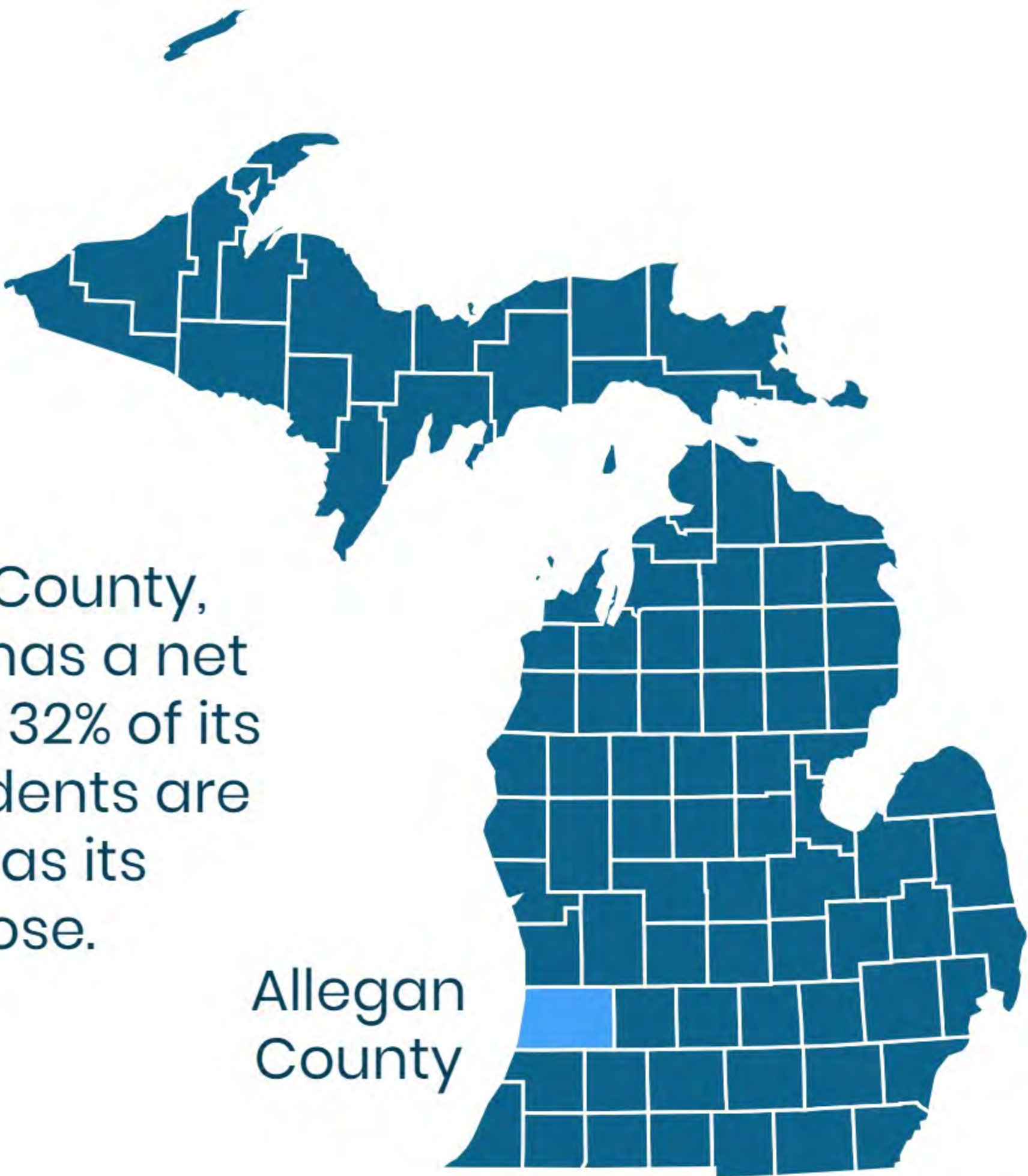
Outflow of Resident Workers | Douglas

The destinations of workers commuting from the city each day, unadjusted for inflow.

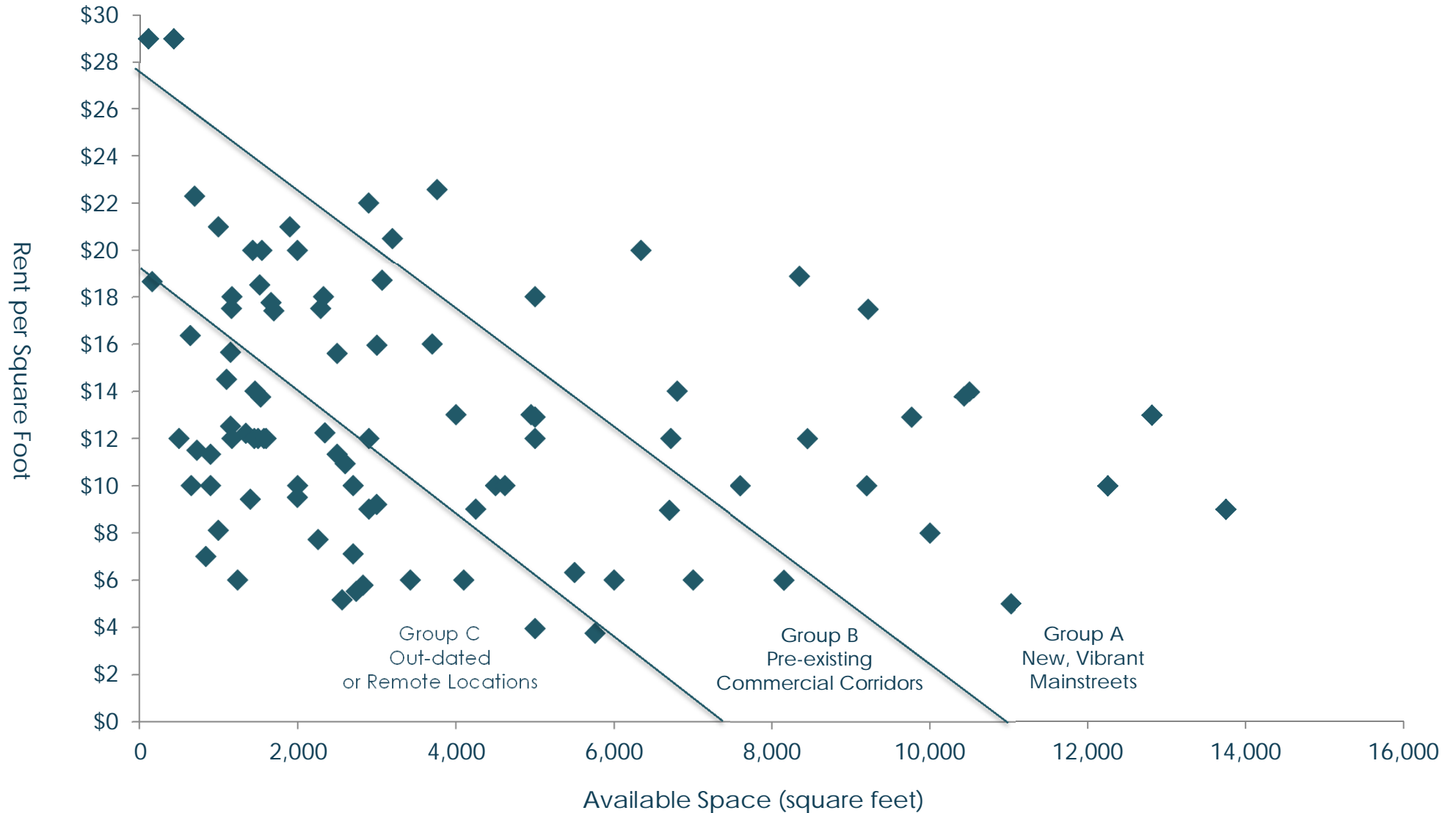


The City of Douglas is located in Allegan County, which is in Southwest Michigan. The city has a net daily inflow of +190 workers, representing 32% of its total daytime workers. In general, its residents are willing to drive farther out for jobs; whereas its daytime workers tend to live relatively close.

Total Inflow = 590
Total Outflow = 400
Net Inflow = +190
Net Inflow = +32%



Retail and Office Space
Michigan Great Lakes Shoreline Communities
Through March 2019



Source: Underlying data is based on county assessor's records, plus field analysis and phone interviews conducted by LandUseUSA | Urban Strategies through March 2019.

section **i**

PlaceScore™
Analysis

PlaceScore™ | Douglas

An assessment of downtown placemaking, progress, and strategies.



Total PlaceScore = 19
Population ~ 1,200

PlaceScore Summary

The City of Douglas has an overall PlaceScore of 19 points, which rivals Saugatuck (20 points) and is exceptional relative to its small size. However, Douglas is also a unique waterfront community with 50% import by non-residents; so additional points will be important in retaining and attracting both residents and visitors. With this in mind, the city should implement some of the strategies described below and strive for a higher score of 22 to 26 points over the next few years.

Highly Preliminary PlaceScore and Marketing Strategies

1. Use the results of the new residential target market analysis and retail study to guide the development of a downtown subarea plan, with a focus on vacant parcels along Center Street.
2. Use WalkScore's application and user interface on hand-held devices to register attractions and amenities, including all retail merchants, art galleries, restaurants and cafes, playgrounds, kayak launch, grocery stores and other traveler conveniences, museums, libraries, etc.
3. Collaborate with the Saugatuck-Douglas Visitor's Bureau to redesign the website URL and email addresses, placing an equal emphasis on both cities (Saugatuck.com is not a balanced brand for the twin cities). Conduct a membership drive in Douglas to recruit retailers, galleries, and restaurants; with stakeholder input on strategies to support the chamber's efforts.
4. In all new public-sector developments along Center Street, include free public parking that is available to all shoppers and visitors - regardless of their destination within the downtown. Avoid the development of privatized parking lots along Center Street.
5. Improve the number and quality of downtown maps and brochures that can be downloaded or printed from online sources. Consider maps of historical buildings, shopping choices, galleries, parks, recreational resources, etc. Always show the city's relationship to Saugatuck and highway interchanges.
6. Provide a more transparent link between the city's main website page and the Downtown Development Authority. Similarly, the DDA website should provide a link to city resources, and particularly its most recent studies, plans, and new maps.
7. Avoid using the city's Facebook page for public notices, safety precautions, emergencies, collection day announcements, and non-retail ads. Ensure that every single post is about a merchant, gallery, restaurant, entertainment venue, event, celebration, and related content. The Facebook page must be used to engage residents, visitors, and shoppers in ways that encourages them to visit and spend in the downtown. Administrative announcements should be posted on the city's website and in printed media releases through local newspapers, and/or a separate Facebook page for the police and safety divisions.

PlaceScore™ | Douglas

Used to track Placemaking progress and formulate Downtown strategies.
Attributes must be discoverable and evident through online sources.

PlaceScore 30-Point System | Address the red Items

Local-Level Planning Documents

1. Local or Municipal Master Plan (not County)
2. Adopted Zoning Ordinance or underway
3. Pursuing a Form-Based Code or Hybrid
4. IncDev workshop or bootcamp planned
5. Parks & Recreation Plan or Commission

Downtown Planning and Related Initiatives

5. Established BID, DDA, or Similar Organization
6. Downtown Master Plan or Subarea Plan
7. Streetscape, Transport. Improvement Plan
8. Facade Improvement Program is active
9. Retail Market Study and Strategy
10. Residential Market Study and Strategy

Downtown Organization and Marketing

11. Redevelopment Ready Community Certificate
12. Engaged in Michigan Main Street program
13. Has an Active Facebook Page, Social Media

Unique Amenities & Destinations

15. Waterfront Access with Parks, Paths
16. Established Farmers' Market
17. Summer Concert Series
18. National or Other Major Festival
19. Cinema, Theater, and/or Playhouse

Downtown Street and Environment

20. Total Reported Walk Score is 50+
21. Walk Score per 1,000 Population is 40+
22. Pedestrian Cross-Walks at Signaled Lights
23. Angle Parking on Main Street (not parallel)
24. Off-Street Parking is Evident & Signed
25. Two-Level Scale of Historic Buildings
26. Balanced Scale on Both Sides of the Street
27. Two-Way Traffic Flow, not One-Way

Listings or Maps of Merchants & Amenities

28. Listing or Map on Municipal Website
29. Listing or Map on DDA or Downtown Website
30. Listing or Map on Chamber or CVB Website

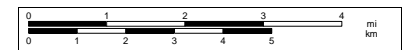


section j
**Geographic
Setting**

Geographic Setting, Lakes, and Highways The City of Douglas, Michigan

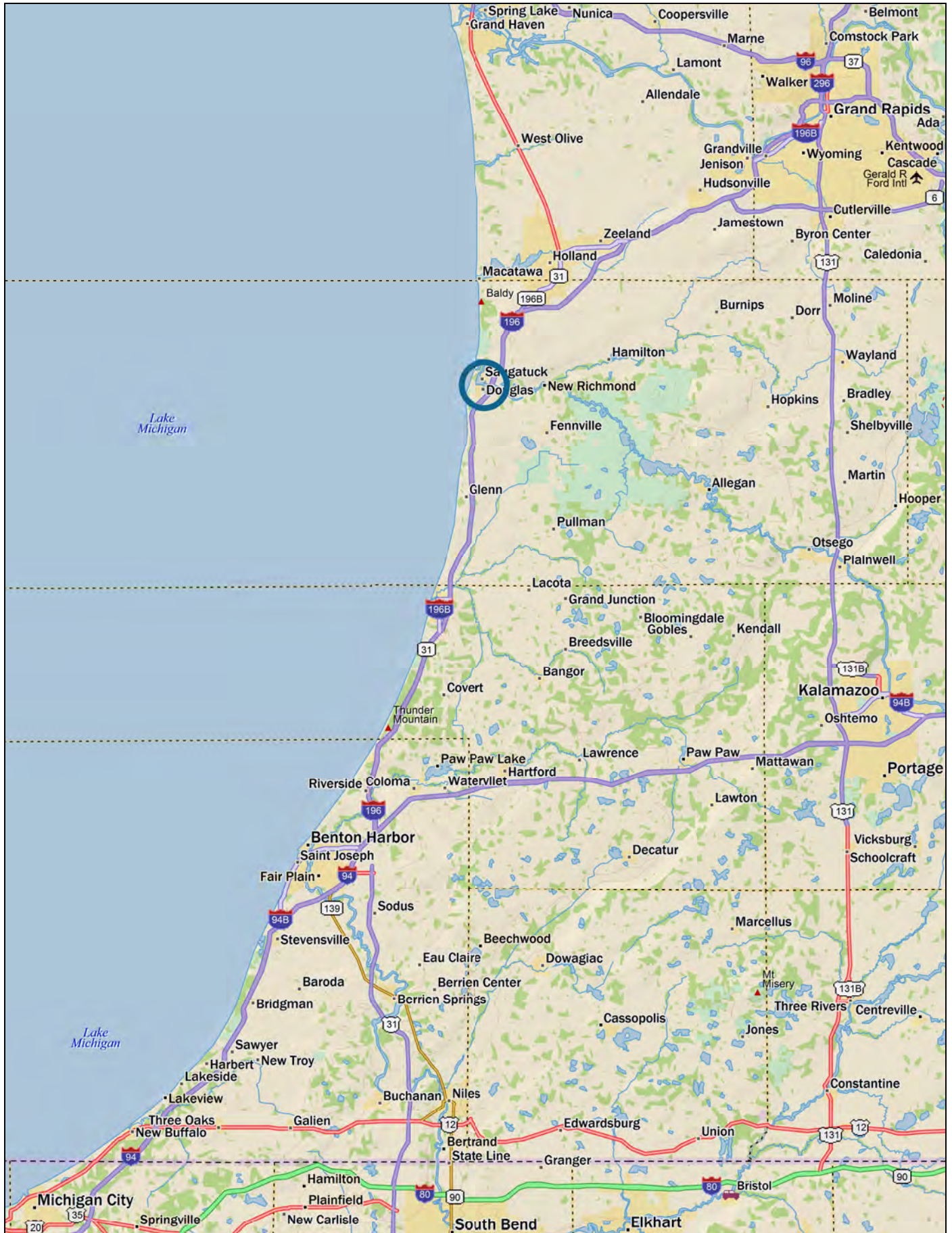


Underlying map provided by DeLorme XMap; exhibit created by LandUseUSA | Urban Strategies ©
on behalf of the City of Douglas, 2019.

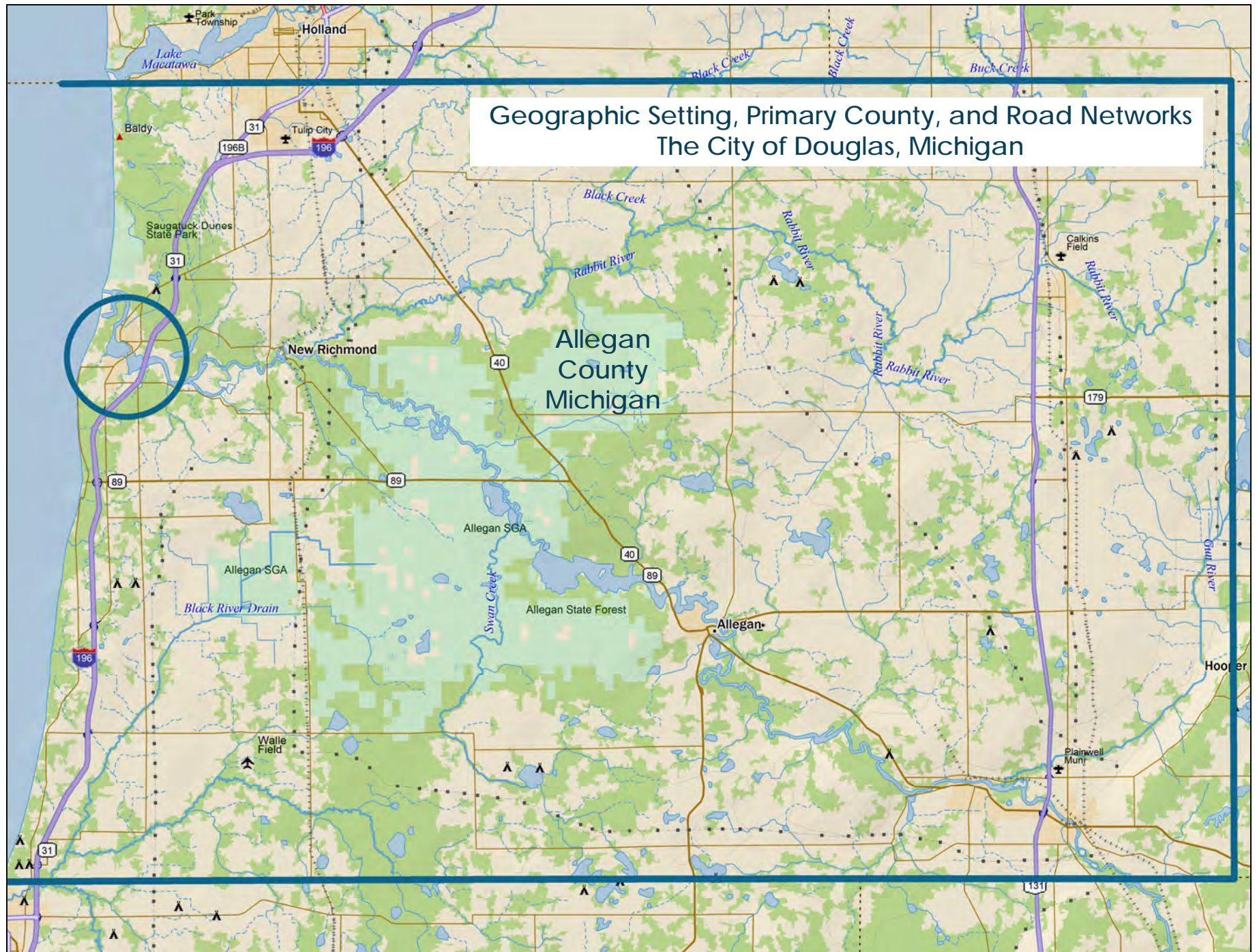


Geographic Setting, Lakes, and Highways

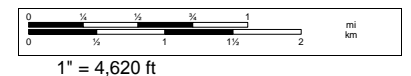
The City of Douglas, Michigan



Underlying map provided by DeLorme XMap; exhibit created by
LandUseUSA | Urban Strategies © on behalf of the City of Douglas, 2019.

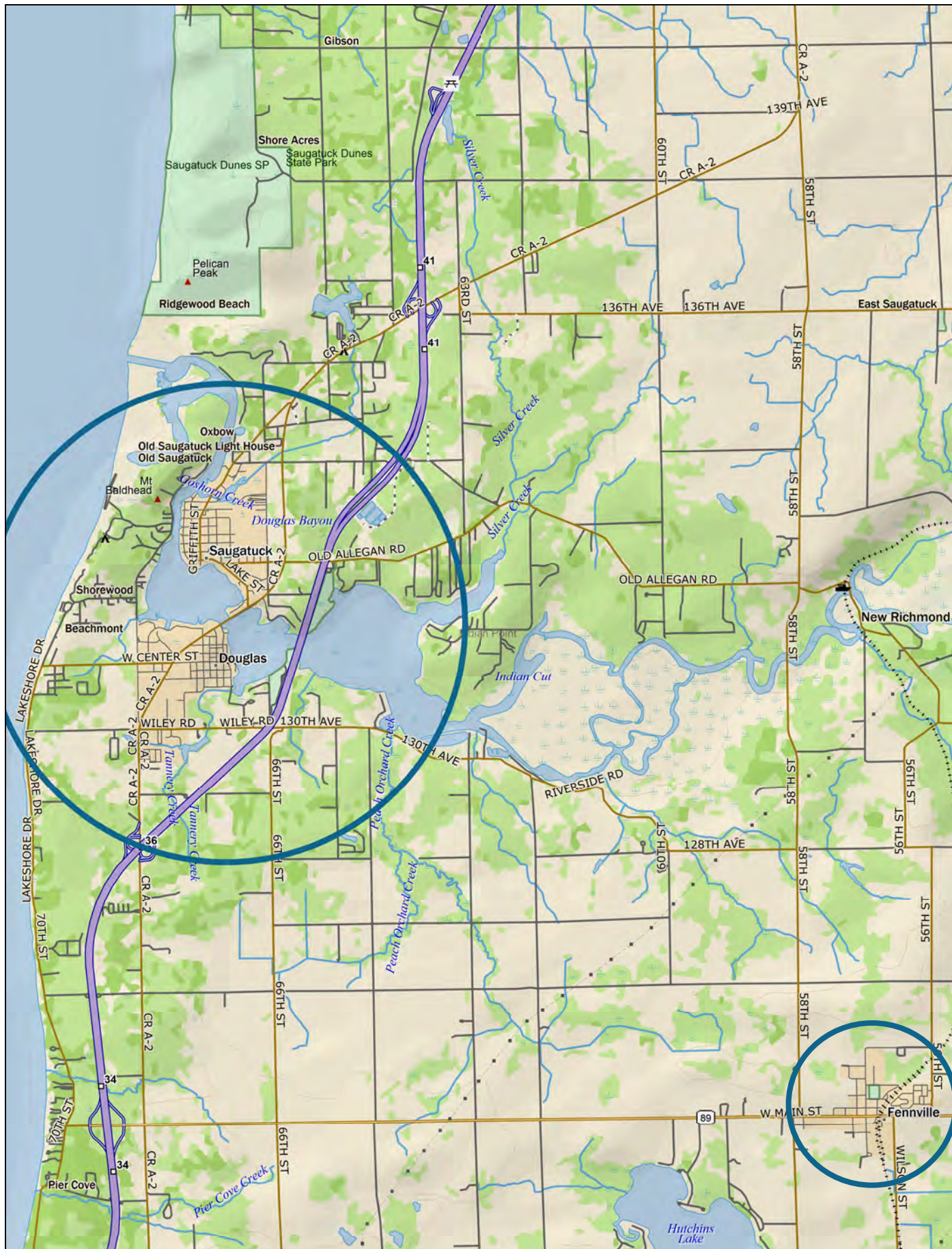


Underlying map provided by DeLorme XMap; exhibit created by LandUseUSA | Urban Strategies ©
on behalf of the City of Douglas, 2019.

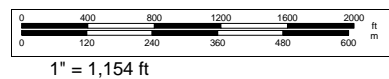


Geographic Setting and Local Street Networks

The Cities of Douglas, Saugatuck, and Fennville, Michigan

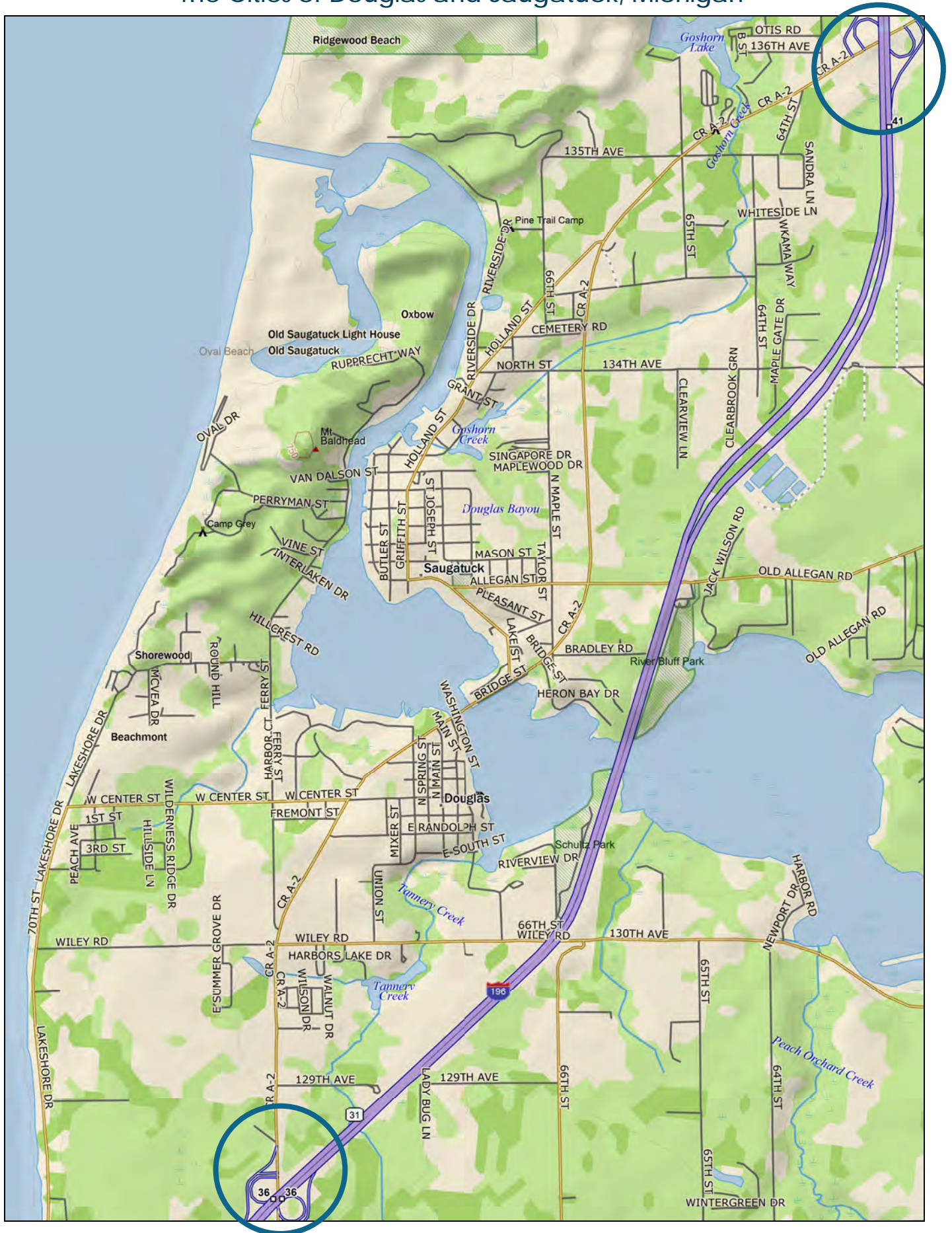


Underlying map provided by DeLorme XMap; exhibit created by LandUseUSA | Urban Strategies © on behalf of the City of Douglas, 2019.

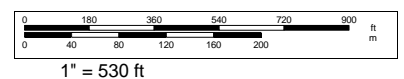


Geographic Setting and Highway Interchanges

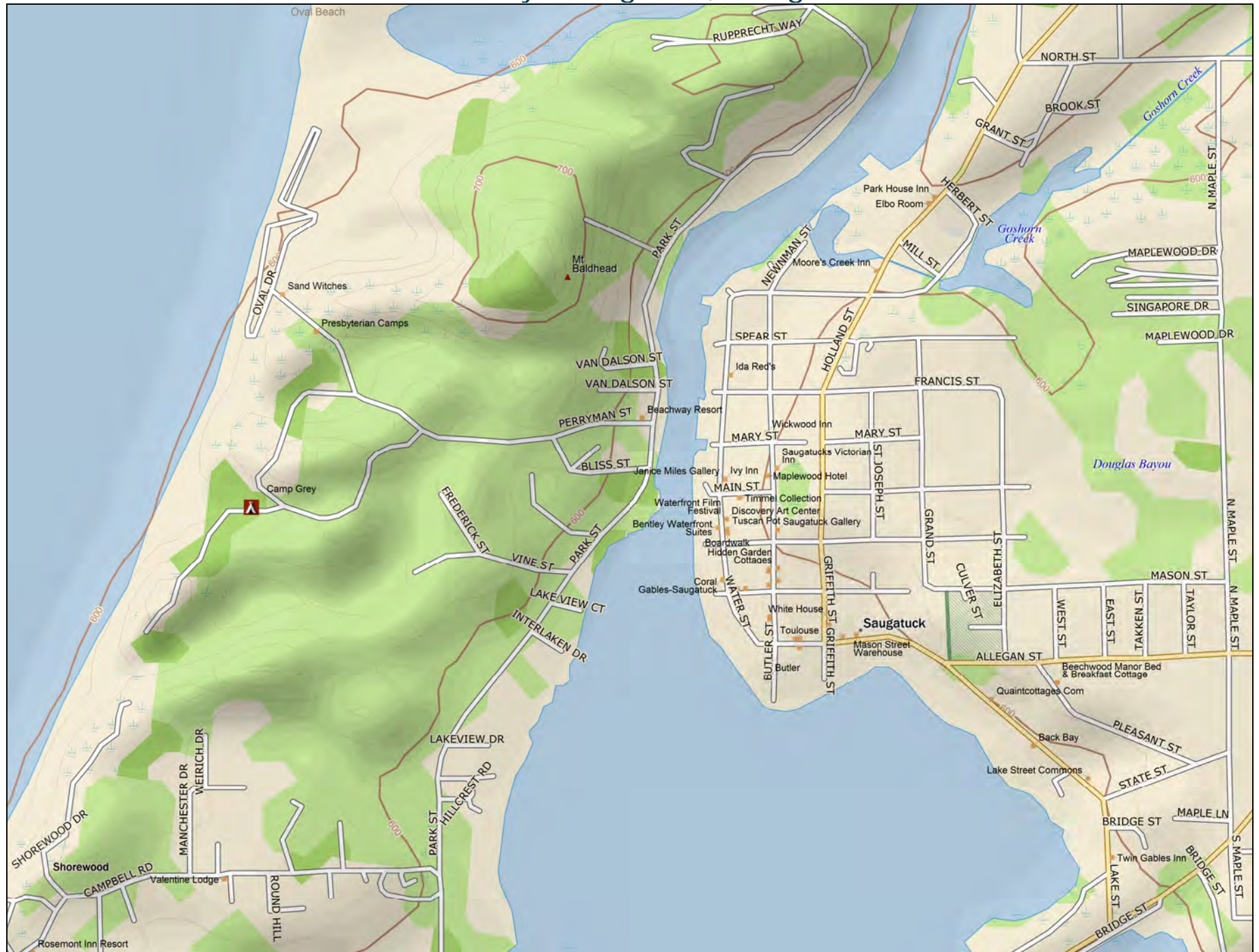
The Cities of Douglas and Saugatuck, Michigan



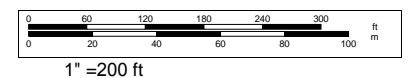
Underlying map provided by DeLorme XMap; exhibit created by
LandUseUSA | Urban Strategies © on behalf of the City of Douglas, 2019.



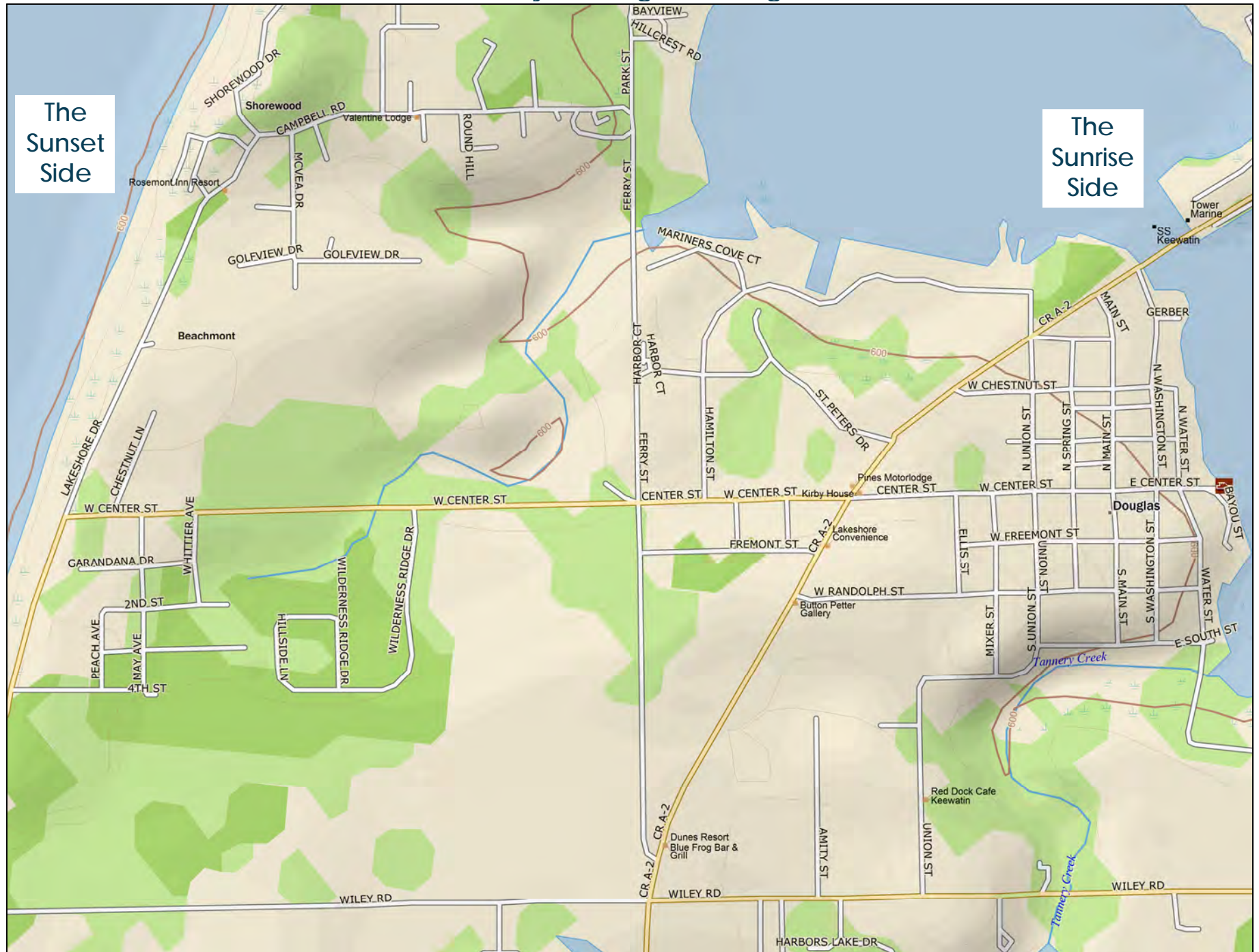
Geographic Setting, Shorelines, and Street Grids The City of Saugatuck, Michigan



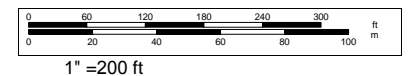
Underlying map provided by DeLorme XMap; exhibit created by LandUseUSA | Urban Strategies ©
on behalf of the City of Douglas, 2019.

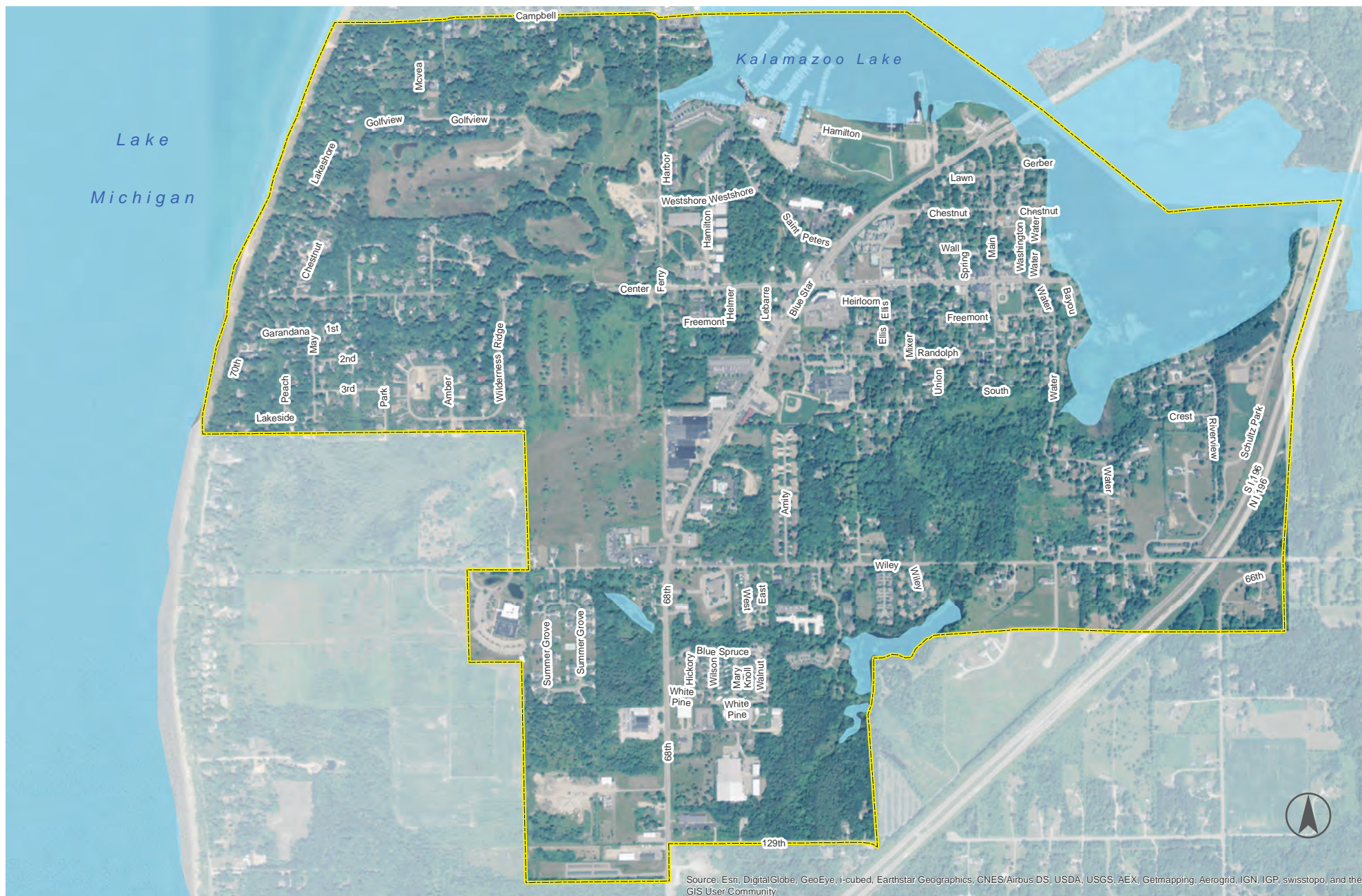


Geographic Setting, Shorelines, and Street Grid The City of Douglas, Michigan



Underlying map provided by DeLorme XMap; exhibit created by LandUseUSA | Urban Strategies ©
on behalf of the City of Douglas, 2019.





Aerial Photo with Primary Streets and Water Bodies The City of Douglas, Michigan | 2016

Source: Excerpted from the 2016 Master Plan (prepared by Williams & Works) with permission from the City of Douglas.

section **K**

Master Plan Review

Prioritization of Prospective Development and Urban Infill Sites

The City of Douglas, Michigan | Retail with or without Urban Lofts



Underlying aerial photo provided by Google and licensed to LandUseUSA | Urban Strategies through eSite Analytics. Exhibit prepared by LandUseUSA | Urban Strategies on behalf of the City of Douglas, 2019. City boundary and site lines are imprecise and intended only for demonstrative purposes.

Waterfront Master Plan | Revised to Keep Retail in the Downtown The City of the Village of Douglas | Concept Alternative/Option F

Recommendations:
A Trolley takes the shortest route to the downtown, where visitors are converted into shoppers. Free bicycles loaners all have baskets. Trolley and bicyclists can cross the Blue Star Highway safely to reach the downtown. They are not re-routed along the shoreline and away from the downtown. The marina has only one new waterfront bar and grill. Patrons craving other culinary experiences must go into the downtown. All cafes, novelty restaurants, and gift shops are in the downtown, and not permitted in the hotels or along marina boardwalks. The Farmers' Market must stay at Beery Field.

Revised by LandUseUSA

1. Tower Marine - supplies, repairs
2. Tower Marine - the marina
3. Convenience snacks/ice Only
Bicycle loaner kiosk #1
4. Hotel, public outdoor pool
5. Parking
6. New municipal marina
7. Indoor boat storage
8. Picnic pavilion, kayak rental
9. Bar & grill, bike Kiosk #2
10. Natural area/park
11. Hotel, weekly townhouses
12. Day cruises, playground
13. Waterfront trail
14. Park, open space
15. Intersection improvements
16. Hotel, weekly townhouses
17. Natural area (no buildings)
- xx. No privatized housing units



- ROUTE for FREE TROLLEY and FREE BIKE LOANERS with baskets
(The best route for converting boaters into shoppers)
- - - - - PATH of Least Resistance for Boaters walking to Wade's Bayou
(Diverts visitors away from the downtown, discourages shopping)

Page	check	Recommendations and Strategies with Benefits for RETAIL
15, 32	<input type="checkbox"/>	Formulate quick-response strategies for filling the window displays of merchant spaces that close seasonally or turn-over often.
15	<input type="checkbox"/>	Collaborate with the Saugatuck-Douglas Visitors' Bureau on a membership drive to improve participation by Douglas' merchants.
added	<input type="checkbox"/>	As the Visitors' Bureau to reciprocate by adjusting its branding, marketing, advertising, and related strategies be include both cities equally.
30	<input type="checkbox"/>	Allow for flexibility of compatible building types and heighst in the downtown, which will help offset development costs.
92, 95	<input type="checkbox"/>	Allow building heights up to three levels with the upper level having set-backs of at least 20' from the second level.
30	<input type="checkbox"/>	Create a form-based code to regulate building types within the downtown.
92, 95	<input type="checkbox"/>	Update the zoning ordinance and implement a form based-code, plus storefront design requirements.
31	<input type="checkbox"/>	Create a food truck ordinance. Revise the zoning ordinance if necessary to ensure that food trucks are allowed in the downtown.
92, 95	<input type="checkbox"/>	Allow food trucks in the downtown.
32	<input type="checkbox"/>	Add events that are clearly designed to celebrate the community's cultural diversity and especially in the LGBTQ+ communities.
46, 47	<input type="checkbox"/>	Experiment with the event calendar and program to attract visitors earlier and later in the year. Coordinate with neighboring jurisdictions.
32	<input type="checkbox"/>	Aggressively advertise and promote the downtown as a free wi-fi zone with high-speed internet connections.
47, done	<input checked="" type="checkbox"/>	Planned: Develop a new library with high-tech connectivity.
43	<input type="checkbox"/>	Use vacant parcels and strategic infill opportunities to expand the physical footprint of the downtown west and all the way to Ferry Street.
46	<input type="checkbox"/>	Create a free temporary permit program with participating property owners allowing temporary events and pop-up activities.
92, 95	<input type="checkbox"/>	Allow and encourage pop-up retail on vacant lots; and allow public art exhibits on public and private properties.
88	<input type="checkbox"/>	Pursue acquisition of vacant and underutilized preproperties for use as temporary activity space.
95	<input type="checkbox"/>	Pursue acquisition or work with owners to lease storefronts of vacant or underutilized properties for development of tempory activity space.

Source: Original recommendations (as indicated by the page numbers) have been garnered from the city's 2016 master plan prepared by Williams & Works. LandUseUSA | Urban Strategies has made refinements with additions, clarifications, and other notations based on the findings of the 2019 market studies.

Page check Recommendations and Strategies with Benefits for RETAIL

PARKING and ACCESS

- | | | |
|---------|--------------------------|---|
| 60 | <input type="checkbox"/> | Amend the zoning ordinance to reduce parking requirements for retail (and office) uses and strive to reduce the parking ratios. |
| 60 | <input type="checkbox"/> | Create and implement a parking wayfinding plan that encourages parking along side streets and in clearly marked municipal lots. |
| 60 | <input type="checkbox"/> | Provide special overnight on-street parking passes for existing and new residents who are living in and near the downtown. |
| 92, 95 | <input type="checkbox"/> | Eliminate parking requirements for any new retail buildings that are developed in the downtown. |
| 59 | <input type="checkbox"/> | Develop a street design manual and pedestrian-first philosophy that improved crossings, sidewalks, bike lanes, and related amenities. |
| 80 | <input type="checkbox"/> | Add a bike lane on the west-bound (north) side of Center St; from the Blue Star Highway west to Lakeshore Dr (Douglas Beach Park). |
| 88, 96 | <input type="checkbox"/> | Improve and enhance pedestrian connections to waterfronts via Washington, Water, and Center Streets. |
| refined | <input type="checkbox"/> | Improve and enhance pedestrian connections from the waterfronts into the downtown, via Washington, Water, and Center Streets. |
| 97 | <input type="checkbox"/> | Create and implement a shuttle or trolley system that transports residents and visitors between destinations. |
| refined | <input type="checkbox"/> | Create a shuttle or trolley system that transports visitors from downtown Saugatuck and waterfronts into downtown Douglas. |

BLUE STAR HIGHWAY & CENTER STREET

- | | | |
|----|--------------------------|--|
| 43 | <input type="checkbox"/> | Significantly improve the intersection of the Blue Star Highway at Center Street, and focus on improving the pedestrian environment. |
| 59 | <input type="checkbox"/> | Eliminate the right turn lane from Center Street to Blue Star, and in both directions. |
| 80 | <input type="checkbox"/> | Redesign the Blue Star Highway intersection at Center Street to minimize the crosswalk distances. |
| 80 | <input type="checkbox"/> | At the intersection of the Blue Star Highway and Center Street, consider bump-outs, roundabouts, and other design strategies. |
| 97 | <input type="checkbox"/> | Improve pedestrian safety with bump-outs, crosswalks, raised pavements, landscaped medians, safety islands. |

Source: Original recommendations (as indicated by the page numbers) have been garnered from the city's 2016 master plan prepared by Williams & Works. LandUseUSA | Urban Strategies has made refinements with additions, clarifications, and other notations based on the findings of the 2019 market studies.

Implementation Plan and Progress Tracking | 2016-2019

The City of the Village of Douglas, Michigan

DRAFT
04/07/19

Page check Recommendations and Strategies with Benefits for RETAIL

WATERFRONT - GENERALIZATIONS

30	<input type="checkbox"/>	Invest in economic development at the Douglas Waterfront and a municipal marina.
47	<input type="checkbox"/>	Create, advertise, and promote businesses and public spaces as pet-friendly places.
52	<input type="checkbox"/>	Treat the waterfronts as public frontages that require public access easements and trails/boardwalks within all new developments.
55, vague	<input type="checkbox"/>	Develop an illustrative plan of the waterfronts on which a future form-based code can be based.
94, 96	<input type="checkbox"/>	Add tactical placement of signage, wayfinding, and visual cues that guide residents and visitors to the waterfronts.
refined	<input type="checkbox"/>	Add tactical placement of signage, wayfinding, and visual cues that guide residents and visitors into the downtown.
95, vague	<input type="checkbox"/>	Expand recreational offerings at waterfronts to attract both residents and visitors.
96	<input type="checkbox"/>	Construct a continuous multi-use trail from Douglas Harbor to the Blue Star Highway underpass.
priority 1	<input type="checkbox"/>	The bayou is most important because it links with the downtown retail, so its visitors can be converted into shoppers.
priority 2	<input type="checkbox"/>	The municipal marina project should take second place as a priority because boaters can also be converted into retail shoppers.
priority 3	<input type="checkbox"/>	The Blue Star Highway underpass takes third place in the list of priorities, and should be addressed after the harbor/bayou and marina projects.

DOUGLAS HARBOR / WADE'S BAYOU

31	<input type="checkbox"/>	Improve pedestrian access and walkways along the riverfront and Douglas Harbor.
51	<input type="checkbox"/>	Re-envision Douglas Harbor, improve the entry with signage and landscaping; enhance the parking; build a focal point; connect with trails.
51	<input type="checkbox"/>	Maintain the quiet, non-motorized recreational use of the Memorial Park with passive recreation like fishing, picnics, docks, launches.
refined	<input type="checkbox"/>	Allow and encourage revenue-generating small businesses like a bait & tackle shop, kayak and jet ski rental, and refreshments.
88	<input type="checkbox"/>	Remove the "No Outlet" sign into the Douglas Harbor because it discourages access.
96	<input type="checkbox"/>	Create a focal point at the Douglas Harbor.
added	<input type="checkbox"/>	Wayne's Bayou Memorial Park and Bayou Street are names that should be cross-branded to create intrigue with the "harbor".
added	<input type="checkbox"/>	Rename the harbor to Wade's Bayou & Harbor. This is unlikely to be confused with Douglas Beach Park, Harbor Rd, or a future marina.

MUNICIPAL MARINA

31	<input type="checkbox"/>	Secure a public marina that has revenue-generating slips available for rent, and for both seasonal and transient boaters.
55	<input type="checkbox"/>	Outline a cost-effective strategy for creation of a municipal marina; conduct a feasibility study; and formulate a framework plan.
added	<input type="checkbox"/>	At the public marina, include a boater's convenience store with boating supplies, fishing gear, bait, snacks, refreshments, and ice.
added	<input type="checkbox"/>	Test the feasibility of other revenue-generating amenities like boat and jet ski rentals, charter boats, day cruises, and vintage boat tours.
added	<input type="checkbox"/>	Create and identify clearly marked lots for boat maintenance, repairs, and seasonal storage. Consider a municipal boat storage area.

BLUE STAR HIGHWAY UNDERPASS (at Washington Street)

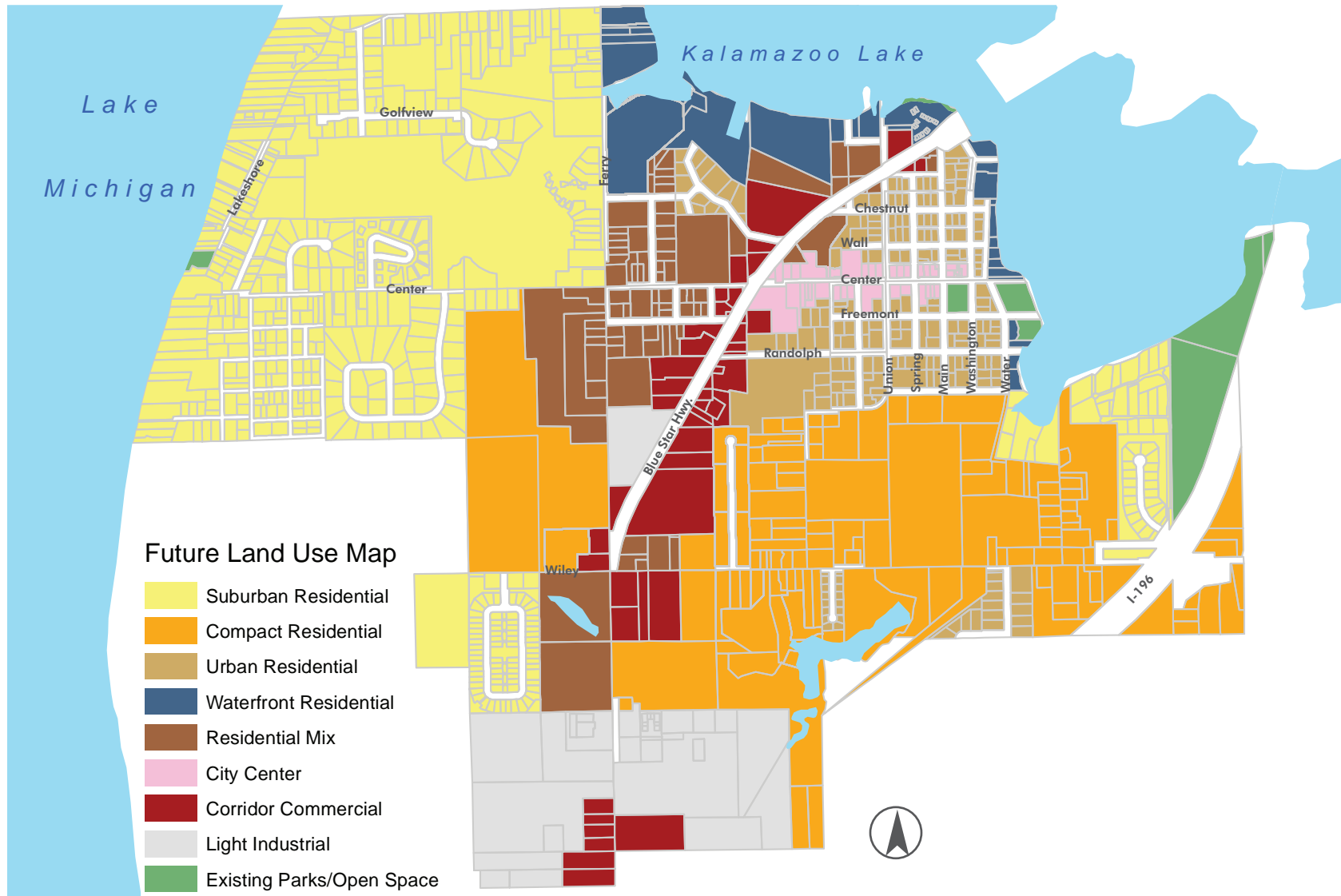
52	<input type="checkbox"/>	Enhance the public parking area adjacent to the Blue Star Hwy underpass (ast Washington St) as community space, including water access.
84	<input type="checkbox"/>	Convert the Blue Star Highway underpass into an area of activity with seating under the bridge, trail, crosswalk, art/murals, lighting, etc.
96	<input type="checkbox"/>	At key focal points like the Blue Star Highway underpass, enhance the lighting, signage, and pedestrian amenities.

Source: Original recommendations (as indicated by the page numbers) have been garnered from the city's 2016 master plan prepared by Williams & Works.

LandUseUSA | Urban Strategies has made refinements with additions, clarifications, and other notations based on the findings of the 2019 market studies.

Future Land Use Map

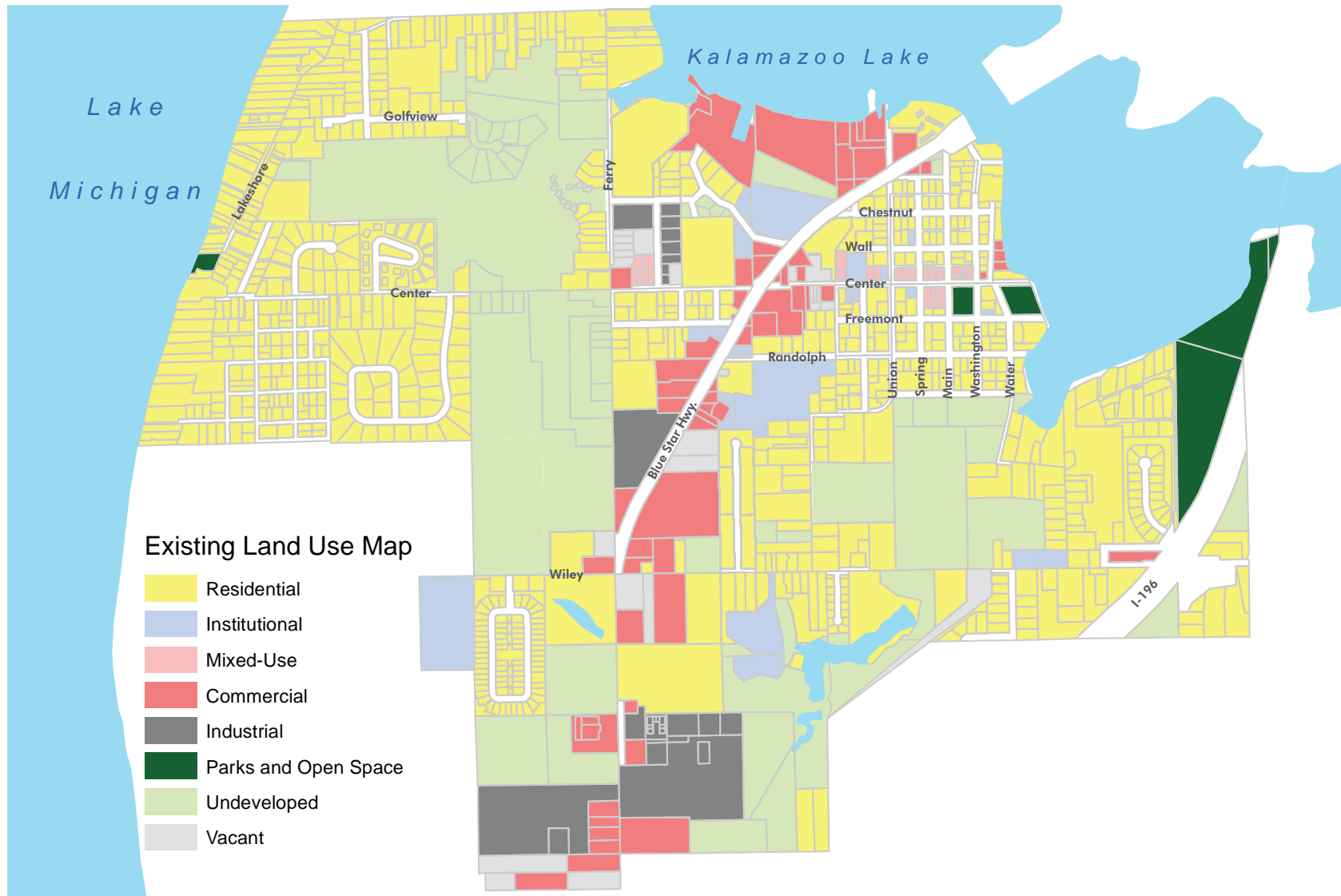
The City of Douglas, Michigan | 2016



Source: Excerpted from the 2016 Master Plan (prepared by Williams & Works) with permission from the City of Douglas.

Existing Land Use Map

The City of Douglas, Michigan | 2016

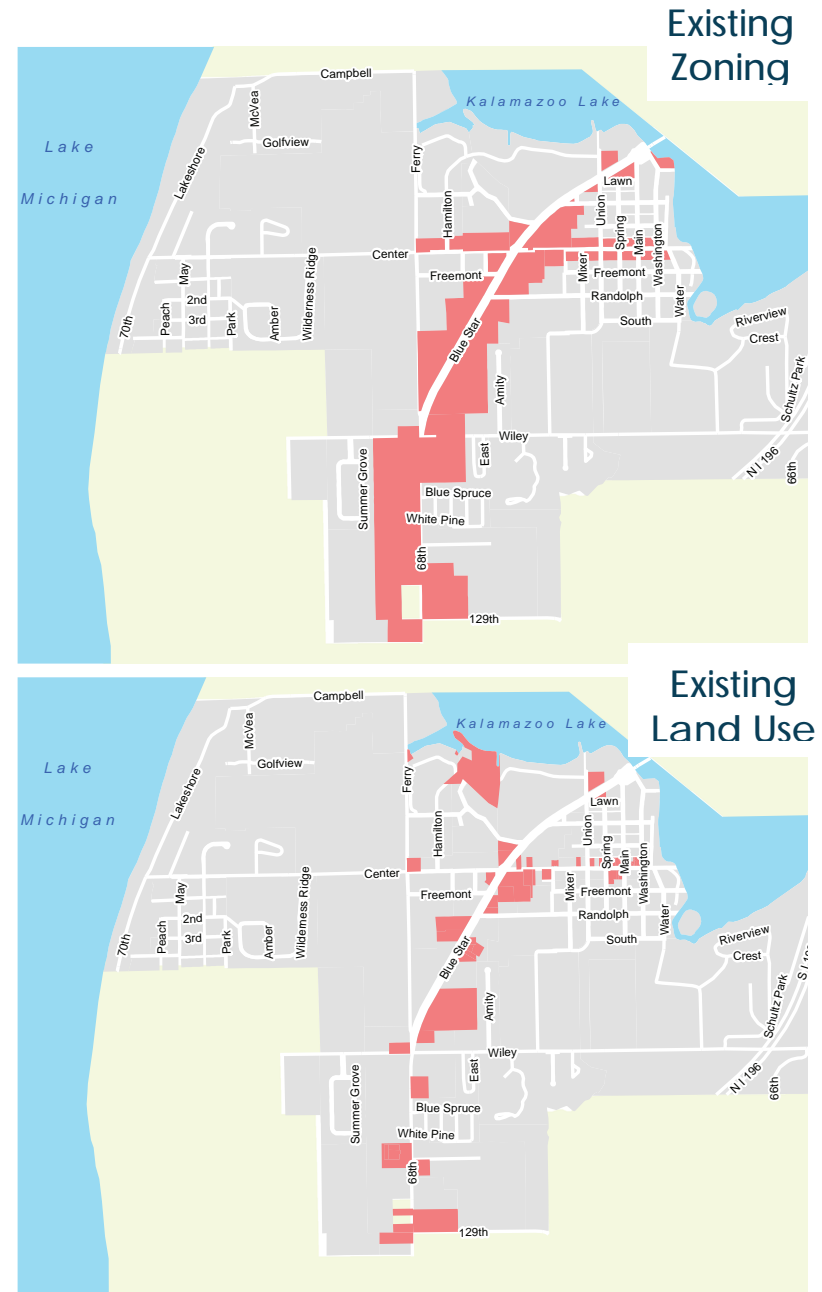


Source: Excerpted from the 2016 Master Plan (prepared by Williams & Works) with permission from the City of Douglas.

Current Commercial Zoning | 2016 The City of the Village of Douglas

Much of Douglas' retail and service based economy is focused on Blue Star Highway, dividing the City from east to west. Residents wish to see infill development, along with new business opportunities along Blue Star Highway, creating a regional business corridor that serves the primary needs of year-round residents along with "gateway" features that promote the entrance to Downtown Douglas.

The maps shown at right display the current commercial zoning for the City, top (commercial areas shown in red), and current business uses. There is great potential for infill development not only in the Downtown area east of Blue Star Highway, but south of Center Street and Wiley Road. The intersection of Wiley Road and 68th street shows promise for expanding existing industries and exploring new economic opportunities.



Recommended Retail Zoning | 2016

The City of the Village of Douglas

ECONOMIC REVITALIZATION

- Allow building heights up to three stories (third story step back)
- Implement a form-based code and storefront design requirements
- Less restrictive parking requirements for new buildings
- Allow food trucks downtown
- Consider recessed doorways for future commercial buildings to avoid disrupting pedestrian traffic flow
- Consider pop-up businesses on vacant lots

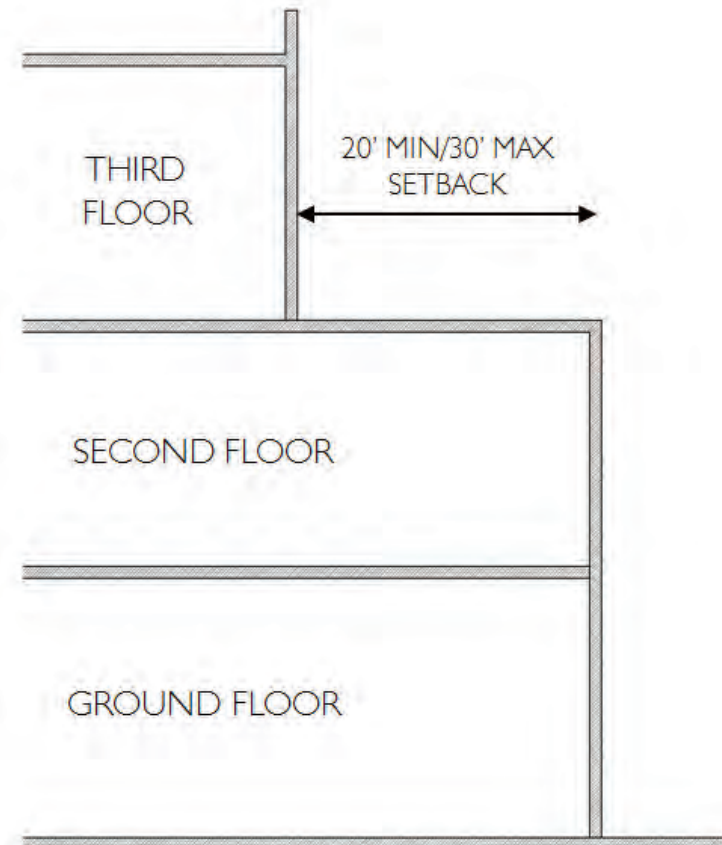


Recommended Retail Zoning | 2016

The City of the Village of Douglas



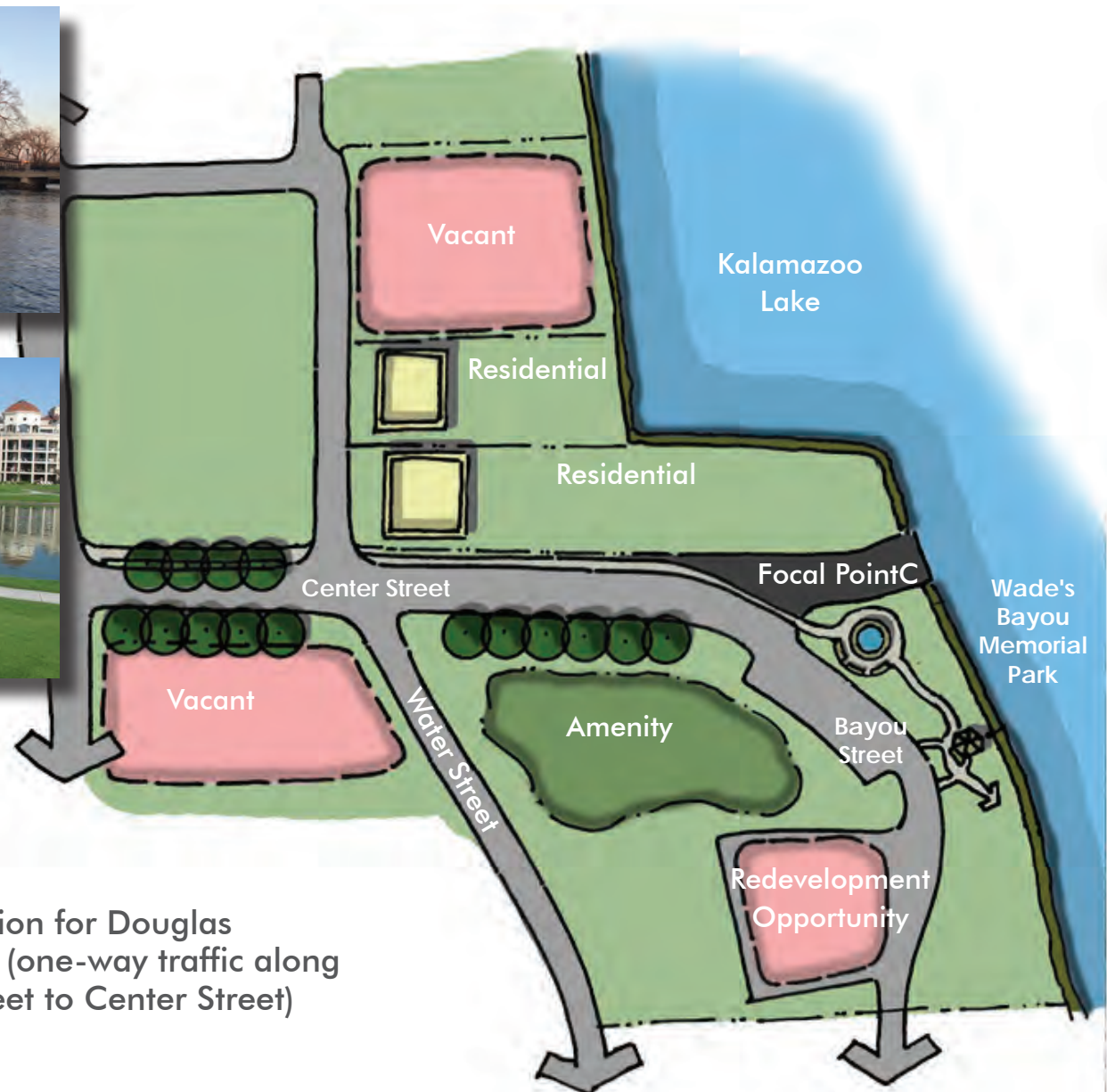
Examples of three story (step back) mixed-use building types



Source: Excerpted from the 2016 Master Plan (prepared by Williams & Works) with permission from the City of Douglas.

Vacant Land and Enhancements at Douglas Harbor

The City of Douglas, Michigan | 2016



Possible recommendation for Douglas Harbor enhancements (one-way traffic along southbound Water Street to Center Street)

Source: Excerpted from the 2016 Master Plan (prepared by Williams & Works) with permission from the City of Douglas. LandUseUSA | Urban Strategies recommends re-branding the harbor to "Wade's Bayou and Harbor", to create intrigue while clearly differentiating it from Douglas Beach Park and eliminating possible confusion.