

Downtown Market Strategy

Prepared for:
The City of Escanaba, MI

Final Report

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1.0 Executive Summary

1.1 Introduction

The City of Escanaba and its Downtown Development Authority (DDA) have retained Anderson Economic Group to develop a market strategy for its downtown. This Downtown Market Strategy analyzes the development potential for the community with an emphasis on economic catalysts to benefit retail. Our report also addresses parking options in the downtown and the general practicality of a high-speed ferry.

EXHIBIT 1. This mural in downtown Escanaba portrays the city's history as a lumber and mining port.



1.2 Strategy and Recommendations

Downtown Escanaba holds favorable potential for retail growth and development beyond its current level. The following section will outline the strategy for catalyzing redevelopment in the community. While the strategy focuses on action to be undertaken by the City and DDA, private investment and public/private cooperation will be crucial to achieve the downtown's full potential.

We recommend a three-point strategy for invigorating downtown Escanaba. This three-point strategy wraps multiple elements and recommendations into three categories, listed in order of priority:

1. Find your Focus
2. Find your Identity
3. Find your Niche

Find your Focus

Downtown Escanaba is too long to support retail throughout the entire downtown corridor. The DDA should focus on the core of the downtown, with a focal point at the intersection of Ludington and 11th Street. The following recommendations highlight the key components of this strategy.

Establish the Focal Point. Downtown Escanaba must establish a focal point, a single location that gives the sense of being in the heart of the community. This focal point must be made evident through a prominent structure, monument, or streetscaping that indicates to a visitor that they have reached the community's core. We recommend a combination of decorative streetscaping with a prominent structure such that creates a visual focal point as well as a prominent meeting place that is easily identifiable to residents and visitors alike.

Downtown Size. We recommend a focus on traditional retail businesses in a seven block stretch along Ludington from 14th Street to 7th Street, with the majority of retailers located between 13th and 9th Streets. This does not mean the DDA should abandon or ignore other stretches of Ludington Street or the DDA district. It does mean the DDA should encourage retail clustering to build a critical mass of quality retailers to attract shoppers downtown.

Marina/Waterfront. While the marina and waterfront are valuable attractions for Downtown Escanaba, the DDA's resources should not be diverted to the marina at the expense of the downtown core. The DDA should focus its efforts on the retail core first, then other elements later.

Downtown Parking. Our assessment of parking in downtown Escanaba indicates that there is more than sufficient parking available in the downtown. This aside, we still recommend converting four blocks of Ludington street to angle parking, between 13th and 9th Streets. Switching to angle parking from the current parallel format will create a visual break along the two mile stretch of Ludington Street, provide additional parking in front of retail businesses, and slow down the traffic on Ludington through this four block stretch.

Find your Identity

Currently, Escanaba does not have a clear and distinct identity of its own. Downtown Escanaba must determine its identity and use this identity to shape its design and marketing, thereby creating an Escanaba “brand.”

We recommend that Escanaba focus on its history as a port for the lumbering and mining industries in the upper peninsula. This identity is a connection of both water and land, and allows the downtown to use both elements to build its identity. This identity also works well with the historical buildings located downtown, and tells the story of how the downtown and community came to be.

Find your Niche

With a focus on its core and established identity, the downtown must also find its niche in the retail market. To identify this niche, we have conducted a careful assessment of your current strengths.

Downtown Escanaba has a favorable selection of restaurants and hardline retail, with unique options that attract visitors from outside the community. Escanaba also benefits from tourism, with visitors traveling to the area fishing, hunting, camping, and other outdoor activities. This tourism presents an opportunity to create an outdoor sporting goods destination in Escanaba through a combination of specialty retailers and outfitters. Finally, Escanaba has a mix of residential units downtown. This local population creates a market for convenience items nearby.

Retail Analysis. Downtown Escanaba must also diversify its retail mix and achieve critical mass through aggressive business recruitment to attract shoppers from a wider region. Although retail development continues to be drawn to the intersection of Ludington and Lincoln Streets near the Delta Plaza Mall, a good amount of opportunity remains for downtown growth. While large national chains can be difficult to attract to the downtown, ample opportunity exists for local entrepreneurs, merchants, and businesses.

In completing the supply / demand analysis, we determined that there is opportunity for 112,000 square feet of new growth in 34 unique retail categories, and a clear need to better meet the wants and needs of residents, college students, and visitors. These 34 categories are shown in Exhibit 2 on page 4, and are described in detail in Section 5.0 on page 26 of this report.

EXHIBIT 2. Downtown Escanaba Opportunity by Retail Category

Downtown Escanaba Retail Opportunity		ETA	Downtown
NAICS	Description	Potential Sq. Ft.	Potential Sq. Ft.
44221	Floor Covering Stores	8,000	4,000
442299	All Other Home Furnishings Stores	5,000	3,000
443111	Household Appliance Stores	5,000	2,000
44312	Computer and Software Stores	3,000	1,500
44413	Hardware Stores	6,000	3,000
44421	Outdoor Power Equipment Stores	1,000	500
44512	Convenience Stores	9,000	4,000
4453	Beer, Wine, and Liquor Stores	9,000	4,000
44611	Pharmacies and Drug Stores	30,000	10,000
44612	Cosmetics, Beauty Supplies, and Perfume Stores	2,000	1,000
44613	Optical Goods Stores	2,000	1,000
446191	Food (Health) Supplement Stores	1,000	1,000
446199	All Other Health and Personal Care Stores	2,000	1,000
44811	Men's Clothing Stores	3,000	2,000
44812	Women's Clothing Stores	12,000	5,000
44813	Children's and Infants' Clothing Stores	2,000	1,000
44814	Family Clothing Stores	16,000	6,000
4482	Shoe Stores	4,000	2,000
44831	Jewelry Stores	3,000	2,000
45111	Sporting Goods Stores	20,000	8,000
45113	Sewing, Needlework, and Piece Goods Stores	5,000	2,000
451211	Book Stores	6,000	2,000
452	General Merchandise and Variety Stores	92,000	8,000
4532	Office Supplies, Stationery, and Gift Stores	1,000	1,000
4533	Used Merchandise Stores	8,000	3,000
45391	Pet and Pet Supplies Stores	4,000	2,000
45392	Art Dealers	1,000	1,000
71312	Amusement Arcades	2,000	2,000
71399	All Other Amusement and Recreation Industries	6,000	2,000
7221	Full-Service Restaurants	32,000	12,000
722211	Limited-Service Restaurants	20,000	8,000
7224	Drinking Places (Alcoholic Beverages)	4,000	2,000
812112	Beauty Salons	7,000	3,000
812310	Coin-Operated Laundries and Drycleaners	4,000	2,000
Total Potential Square Feet		335,000	112,000

1.3 Additional Recommendations

Cool Cities Designation. We recommend the City seek designation as a “Cool City,” under the state program to revitalize communities and attract and retain young and creative people to build a knowledge-based economy. The requirements to qualify vary based on the programs included in this initiative, and the benefits include grant fund for specific projects and professional assistance with marketing, planning and design-related elements.

Parking Assessment. Our assessment of public surface lot parking in downtown Escanaba found a sufficient supply of parking space for shoppers, residents, and employees. This was verified through the community survey, in which over 90% of shoppers surveyed indicated they had no trouble finding a place to park.

We do recommend a change from parallel to angle parking in select blocks to create more convenient parking outside storefronts in the retail core of the downtown. We also recommend increasing the size and number of directional signs for parking, and terminating the lease on the gravel parking lot on the southeast corner of 14th Street and 1st Avenue North.

High Speed Ferry. The addition of a high-speed ferry in Escanaba could have significant economic benefits for its downtown, under the best circumstances. If the dock can be located with proximity, walkability, and visibility to the downtown district, it could serve as a retail catalyst for the community. A number of possible ferry routes are listed in section 8 “City of Escanaba - Ferry Proposal” on page 45, and include potential routes to communities in Door County, Wisconsin, the Grand Traverse Bay region, and existing ferry terminals in Ludington and Muskegon, Michigan and Milwaukee and Manitowoc, Wisconsin.

1.4 Implementation Timeline

This Document is structured in an order of priority, with the outlined three-point strategy as a guide to implementation. The following points provide a rough time frame for implementation of this strategy:

Immediate

- Establish consensus and buy-in for the downtown strategy.
- Contact potential ferry operators and partner communities to establish a route
- Establish consensus on the image of Escanaba and the downtown, and use this image in marketing, signage, and streetscaping
- Focus on retail recruitment in the retail core
- Work with developers and building owners to renovate under utilized structures within the retail core
- Terminate lease on gravel parking lot on the corner of 14th and 1st Avenue North
- Enhance the DDA website by providing current news and a calendar of events

Two - Five year goals

- Convert four-block stretch between 13th and 9th Streets to angle parking
- Enhance streetscaping to highlight the downtown focal point at the intersection of Ludington and 11th Street
- Implement the bike path plan with the angle parking and streetscape work
- Enhance the downtown identity through better signage incorporating the new-found identity

Long-Term goals

- Improve physical and visual connections between the marina and the downtown
- After revitalizing the retail core, work outward from the core to revitalize a larger portion of the downtown
- Improve resident and visitor impressions of Downtown Escanaba through a revitalized retail core, a clear community identity, and an effective marketing effort

1.5 Conclusion

Our recommended strategy for Escanaba is aimed at facilitating the long-term economic growth of your downtown. This strategy will not be easy and may not produce immediate results, but is critical for creating and maintaining a favorable business climate.

Economic growth never happens overnight, and considerable time, dedication, human resources, public and private funding, and cooperation are essential to successfully carry out and complete these major objectives. Many project steering committees make admirable attempts at accomplishing far too much with too few resources. For this reason, it is essential that a few key tasks be prioritized, that goals are clear and measurable, and that the DDA board remain dedicated and focused.

Given the recent trends on the local, regional, state, and national levels, the composition of economic structures are changing. Manufacturing has been on a steady decline, as has been witnessed throughout Michigan and the Great Lakes region. The overall economy is shifting to knowledge and service sectors, which places an even greater importance on institutions like Bay College in supporting the community's economic future. The College is essential for preparing workers for skilled jobs in a changing economy.

Meanwhile, retail has the opportunity to expand to meet the demand of local residents and draw in shoppers from a larger region. This is particularly the case given Escanaba's ideal location between Iron Mountain, Marquette and Menominee/Mariette. Rather than viewing nearby cities as direct competitors, Escanaba should consider its role in the region, and capitalize on opportunities to tap into retail activity flowing within the region.

To conclude, the community - The City, DDA, Chamber of Commerce, Bay College, service agencies, businesses, schools, churches, civic organizations, and citizens - all need to work together in this strategy to improve the local economy, community image, and sustain a favorable quality of life in Escanaba.

1.6 About the Authors

Anderson Economic Group, LLC (AEG) provides consulting services in market assessments, feasibility studies, and community and regional economic analyses. AEG has expertise in a variety of planning sectors that include industrial parks, economics, public policy, retail strategies, and residential development. For information about our firm and biographical sketches of the authors, visit www.AndersonEconomicGroup.com.

Disclaimer and Limits

It is recommended that this Downtown Market Strategy not be used as the sole basis for real estate ventures, development, financing or leasing by the City of Escanaba, private developers, or prospective retail tenants and businesses within the area. Actual site, building, parking, utility, environmental, grading, civil engineering, architectural plans and construction documents are not included within the scope of this work. The City should work closely with a professional planning or engineering firm to address these and all related planning considerations.

For additional information or clarification regarding anything in this report, please contact Ms. Sharon M. Vokes or Mr. Cameron L. Van Wyngarden at Anderson Economic Group.

- END OF EXECUTIVE SUMMARY -

2.0 Project Background and Purpose

2.1 Study Purpose

The City of Escanaba, through its Downtown Development Authority (DDA) has retained Anderson Economic Group (AEG) to develop a market strategy for its downtown. This report identifies several significant projects for facilitating future retail growth in the downtown, and related strategic considerations.

This report presents our recommendations and comprehensive strategy for the downtown based on our experience, research, market tour and field analysis, demographic overview, and assessment of local economic factors. Our conclusions are based on current market supply by commercial and business category, qualified by consumer demand, and also reflect the market position of the downtown within the entire local market and region. In addition, we have reviewed and taken into consideration the comprehensive plan that was recently completed for the City.

2.2 Market Overview

Downtown Escanaba is located in the core of the City of Escanaba, between US Highway 2 and Little Bay de Noc in Delta County, Michigan. For the purposes of developing this retail and residential market strategy, we have evaluated several levels of geography, including:

- **State:** Michigan
- **Region:** Delta, Schoolcraft, Alger, Marquette, Dickinson and Menominee Counties
- **Study Area:** Downtown Escanaba and its Effective Trade Area

Based on our evaluation of regional geographies and the location of Downtown Escanaba, we have determined an Effective Trade Area (ETA) for the downtown. Further discussion of the ETA and the methodology for its delineation is discussed later in this report.

For new retail, the ETA will represent 70 percent of retail sales, with the balance being import by visitors. Visitors may include any combination of the following:

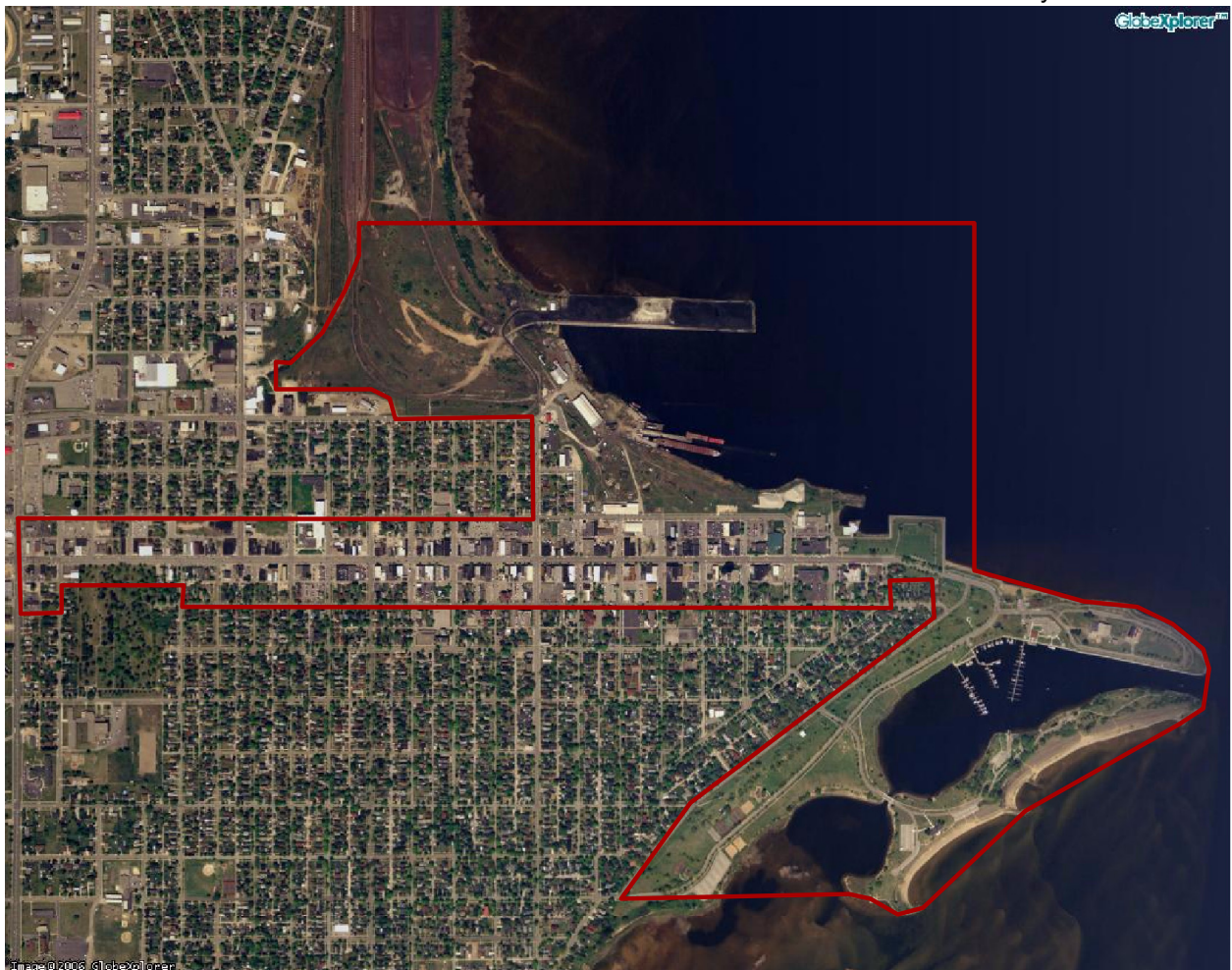
- Tourists traveling through the region to enjoy its natural resources
- Visitors doing business in and around the City
- Shoppers attracted to downtown Escanaba through an effective marketing program.

2.3 Study Area Description

Escanaba is located in the south central portion of Michigan's Upper Peninsula. The community is located along US Highway 2 and M 35, significant traffic routes through the upper peninsula, connecting Escanaba to Manistique, Marquette, Iron Mountain, and Menominee. Escanaba is also located on the west shore of Little Bay de Noc, providing the community a commercial harbor as well as water recreational opportunities.

The study area for this market study is Downtown Escanaba, which encompasses the retail core of the community and stretches from Lincoln Street in the west to the bay in the east, along Ludington Street. This district contains the historic downtown core of Escanaba. Retail and service based businesses are the predominant use throughout, with a mix of apartments and single family homes.

EXHIBIT 3. The Escanaba DDA District extends from Lincoln Street to Little Bay de Noc



2.4 Statement of the Problem

Downtown Escanaba currently has a sluggish retail climate with vacancies and a weak retail mix. The downtown retail environment is not as strong as it has been historically, and many new retailers are showing a preference for locations along Lincoln Street (US Highway 2) instead of Ludington Street downtown.

However, the district benefits from a row of traditional downtown buildings that is well balanced in density and scale, and has symmetry on both sides of the street. The traditional shopping district is primarily aligned along Ludington Street, which is the main east/west thoroughfare through the core of the community.

A declining retail environment in the downtown is not a unique problem to Escanaba. As with many communities across Michigan and the nation, Downtown Escanaba has experienced gradual erosion of its retail base over several decades. The following items highlight some of the specific issues facing downtown Escanaba:

- Residents are traveling to regional shopping destinations in Green Bay and Appleton, Wisconsin.
- The local retail core has “shifted” to Lincoln Street near the Delta Plaza Mall
- The community and region have experienced population decline in recent years
- Economic trends have taken their toll on income, consumer confidence, and retail expenditures.

With these declines over recent decades, Escanaba has lost a number of valued businesses including Wiffletree Men’s Clothier, Jack’s Camera, and Ben Franklin. However, other businesses are also entering the market. Even more notable, an estimated 14 buildings have changed hands in recent months, and local developers have demonstrated interest in some important properties.

Meanwhile, other retail events in the market indicate a positive growth trend overall. Some of the more notable planned or proposed changes include:

- Relocation of Menard's to a new larger store
- New Tractor Supply Store
- Possible new Big Lots store, in former Menard's

This report details our recommended strategy for bringing life back into downtown Escanaba. Our recommendations address the retail potential of the downtown, specific actions that should be taken, and a comprehensive strategy for downtown improvement.

3.0 Find Your Focus

Downtown Escanaba is two miles long, which for the market size is too long to support retail throughout the entire downtown corridor. The DDA should focus its energy and resources on the core of the downtown, with a focal point at the intersection of Ludington and 11th Street. The following recommendations highlight the key components of this strategy.

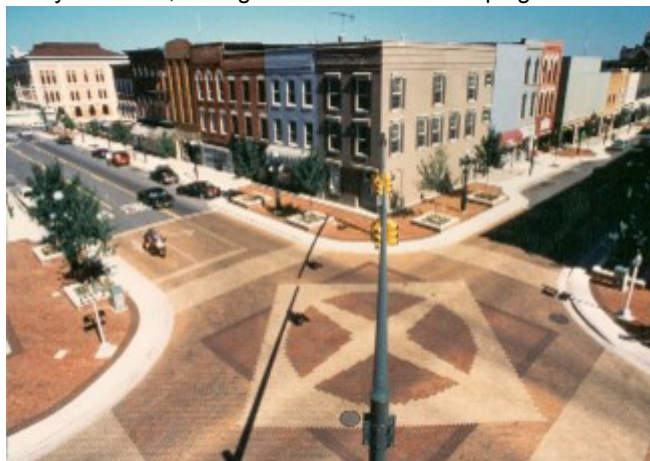
Establish the Focal Point

Downtown Escanaba currently lacks a central focal point. Historically, most downtowns were established at the intersection of two major roads in the center of the community. This made sense then for the same reasons it does today, a location at the crossroads of the two busiest routes has the highest visibility and best access for shoppers and suppliers. Due to Escanaba's unique location on the Little Bay de Noc and the early importance of the port to the city, the downtown was established closer to the water on a street that ended at the bay.

Downtown Escanaba must establish a focal point, a single location that gives the sense of being the heart of the community. This focal point must be made evident through a prominent structure, monument, or streetscaping that indicates to a visitor that they have reached the heart of the community.

Many communities have a prominent civic building such as a courthouse, city hall, or post office in this location. Other cities indicate their center with a park, but this is also not ideal for Escanaba. For Downtown Escanaba, we recommend a combination of decorative streetscaping with a prominent structure such as a monument or a clock tower. This creates a visual focal point and a sense of unity as well as a prominent meeting place that is easily identifiable to residents and visitors alike.

EXHIBIT 4. The City of Adrian, Michigan has used streetscaping and brickwork to indicate its focal point



Downtown Size

The size of Downtown Escanaba was once appropriate for the community, but it no longer makes sense in today's retail environment. National retail chains are now established along the higher traffic corridor of Lincoln street, intercepting shoppers before they can reach the traditional storefronts along Ludington.

We recommend Downtown Escanaba focus its traditional retail businesses in a seven block stretch along Ludington from 14th Street to 7th Street, with the majority of retailers located between 13th and 9th Streets. This does not mean the DDA should abandon or ignore other stretches of Ludington Street or the DDA district. Rather, the DDA should deliberately strive for retail clustering to build a critical mass of quality retailers to attract shoppers downtown.

It is also important to keep non-retail establishments to a minimum in the retail core. Services such as accountants, real estate brokers, and attorneys are valuable to a downtown, but should be clustered together outside the retail core. This is already taking place in the downtown, with a large number of professional service businesses clustered on the east end of the downtown, near the city, county, and state offices. This type of clustering is as important as retail clustering, as businesses that work closely with the government or other professional services will want to be located near each other. Side streets are another good option for service based businesses that do not benefit as greatly from visibility on Ludington.

Private Redevelopment

The downtown has recently received interest from a number of private developers wishing to redevelop portions of the DDA district with new businesses and residential units. One of the most exciting proposals includes the redevelopment of a landmark structure into downtown condos and street-level retail.

We recommend the DDA work diligently with these private investors and provide the assistance needed to make their investment dreams a reality. However, we strongly recommend that the downtown stick to the strategy we have presented, and avoid the temptation to give in to redevelopment plans that do not benefit the downtown, simply to fill a space. If a proposal is made that doesn't fit the downtown's vision or strategy, assist the developer to finding a more suitable location for the project, even if it is outside the DDA district.

Also, focus on recruiting redevelopment efforts for the retail core area and significant buildings first. After the core has been straightened, redevelopment can expand outward to grow the retail core.

Marina/waterfront

While the marina and waterfront are valuable attractions for Downtown Escanaba, the DDA's scarce resources should not be focused on this area. Although the marina and waterfront are situated at the end of Ludington Avenue, they are located too far from the retail core for most visitors to consider walking between the two. The DDA should focus its efforts on the retail core first, then other elements later.

Ideas like an outdoor ice skating rink, hot air balloons and a trolley was brought to our attention. These concepts would be fun additions to the downtown area, and would likely attract residents, but these are not an essential element, and the DDA should first focus on strengthening the core retail environment.

Downtown Parking

There is more than sufficient parking available in Downtown Escanaba. Our observations, assessment, and results from the shopper survey indicate that ample parking options are available downtown, and no additional parking is needed.

We do recommend converting four blocks of Ludington street to angle parking, between 13th and 9th Streets. Switching to angle parking from the current parallel format will serve three primary purposes. First, it will create a visual break along the two mile stretch of Ludington Street. This is important to draw the focus to the retail core of the downtown and create a more visually appealing main street setting.

Second, angle parking will provide additional parking in front of retail businesses. During the course of our study, we heard many merchants complain about a lack of parking, but our observations and shopper survey results indicated no parking problems in the downtown. It is our belief that what merchants really mean is that there is a lack of prime parking right outside their front door. A change to angle parking should ease this problem and create more parking opportunities for shoppers who would like to make a quick stop at a downtown business.

Third, angle parking will slow down the traffic on Ludington through this four block stretch. While this may be seen as an annoyance to some, it is a proven tactic for increasing retail visibility, especially in a downtown setting. By slowing down the through traffic, motorists will have more time to observe stores as they pass by.

Creating angle parking along Ludington will likely require the reduction to one lane of traffic in both directions, with one shared turning lane in the middle. Due to Escanaba's climate and the snow removal concerns of the City maintenance staff, we do not recommend installing planters or any raised curbs in the center lane to ease the snow removal

process. However we highly recommend extending the curbs at intersections to create a safer and more inviting crossing for pedestrians, as well as enhanced visual appeal for the downtown.

4.0 Find your Identity

Currently, Downtown Escanaba does not have a specific identity of its own. The downtown is situated near the bay, yet it doesn't feel like a waterfront downtown. Escanaba is located in the midst of vast natural resources, but this also is not evident in the downtown. Downtown Escanaba currently has little to differentiate it from other communities of similar size. Downtown Escanaba must determine its identity and use this identity to shape its design and marketing to create an Escanaba "brand."

We recommend that Downtown Escanaba focus on its history as a maritime port for the upper peninsula. This identity is a connection of water and land, and allows the downtown to use both elements to build its identity. This identity also works well with the historical buildings located downtown, and tells the story of how the downtown and community came to be.

We encourage the DDA to establish visual representations of this theme downtown, without going overboard. Retired ships, such as the old Chicago fire boat that currently sits to the north of the downtown should be repaired and displayed prominently along the waterfront. The DDA could search for a retired U.S. Navy vessel or a Great Lakes commercial ship to sit in port for visitors to explore. The DDA should also look for opportunities to bring maritime history as a focal point to the downtown.

To further incorporate this identity into the downtown, we recommend placing a strong emphasis on your facade program to restore historic buildings to their original design. It is important that these buildings retain a historic look, rather than a relatively modern facade to create this cohesive historic identity. To further enhance this identity, encourage new construction to blend in with the existing historical architecture.

New buildings should be similar in height and scale, use similar materials with an emphasis on brick, and use similar architectural styles as the existing historical buildings. We recommend that a professional planning firm be retained to help establish and refine the guidelines for the city. LSL Planning, Nederveld Associates, Hamilton Anderson Associates, and JJR Smith are all reputable planning firms in Michigan that could help with this task.

This identity should present visitors with a clear sense that this is a maritime port; a center of commerce, but not a sailboat and pleasure cruise destination. Trying to identify Escanaba as a yachter's paradise similar to Charlevoix or Petoskey will fall flat, because that is not what Escanaba truly is.



In addition to the major objectives and recommendations, we suggest incorporating the following marketing tools to improve and promote the downtown:

- Regularly update the DDA web site with news and upcoming activities in the downtown, promoting merchants, and marketing the downtown to area residents and visitors
- Continue to be pro-active and creative with promotions to make the district attractive to existing tenants and prospective retailers
- Continue efforts to market Escanaba to visitors from outside the region using print, television, and radio advertising
- Pursue business retention before recruitment to make it clear that existing merchants are valued and wanted
- Talk to your existing retailers and valued businesses to improve retention and recruitment efforts
- Carefully consider our recommended retail mix for the downtown and identify and pursue market niches to improve the retail mix
- Keep inventories of local resources and amenities up-to-date as a tool to impress potential new businesses
- Tune in to the competition (Marquette, Iron Mountain, Menominee, etc.) and learn from their efforts
- Maintain a current consumer guide with a map, coupons, and information on downtown businesses
- Recruit and utilize volunteers routinely for successful promotional efforts
- Utilize matchmakers and local business expertise to approach prospective developers and businesses
- Advertise in any vacant windows to increase visibility

- Build a network of referrals for business recruitment efforts
- Practice cross-promotion among businesses by directing customers to other stores where their needs will be met
- Consider creative adaptive re-use of older buildings to preserve historic charm
- Hold merchant workshops to discuss methods and techniques and solve problems
- Create and enforce strict sign ordinances to improve the aesthetic appeal of the downtown.

Enhance the Identity through Downtown Signage

Downtown Escanaba is a charming location with historic structures, friendly salespeople, and views of the Little Bay de Noc. The problem is, not enough people know about it. The City of Escanaba along with the and downtown merchants need to create a consistent plan to market the City and its downtown.

Once the City has decided on its image and phrase, it should be used to update all signs throughout the community. Street signs and directional signs could carry the new logo, as well as wayfinding signs throughout the downtown.

The following pictures are examples of downtown wayfinding signs from Marquette that should be implemented in downtown Escanaba. Notice the consistency, friendly font, and use of a City logo.

EXHIBIT 5. Downtown Signage in Marquette, Michigan



The Escanaba DDA has done well by placing a large directional sign at the intersection of Ludington and Lincoln Streets to lead visitors to the downtown. Visitors must be aware of the downtown before it can become a destination. Now that the sign is in place, the back of the sign should be completed with a phrase like “Thank You! for visiting Downtown Escanaba. Come Back Soon!” Wayfinding signage should also be placed at other locations along Lincoln Street to guide visitors downtown.

EXHIBIT 6. This sign welcomes residents and visitors to discover Downtown Escanaba



We observed that the street signs throughout the community are too small to be read by motorists that are unfamiliar with the community. We recommend replacing street signs with larger signs that incorporate Escanaba’s logo to present a uniform identity throughout the community. We also observed that the banners along Ludington, while attractive, were set too high to be visible by pedestrians. We recommend hanging the banners at a lower level to achieve their full desired affect.

Wayfinding signage should also be implemented to lead Bay College students downtown. Signs can indicate to students, parents, and visitors the desired pedestrian route downtown and lead them to various destinations. These signs could also include informational or historical plaques that inform visitors of interesting items such as the mural advertisements on downtown buildings or the history of structures along the way.

Enhance the DDA Website

The internet is a growing source of information for businesses and shoppers. The marketing done on a web site can be as crucial as any other marketing for the downtown. The Escanaba DDA has a very good website with a full listing of every business located within the DDA boundary. The website also has useful information about grants and loans available to businesses in the downtown.

The Escanaba DDA has an excellent website. However, we have a few recommendations to further enhance its potential as a marketing and information sharing tool. This website should be used as a tool to keep merchants, shoppers and visitors up-to-date about the latest events and happenings in downtown Escanaba. One option is to include an events calendar that gives website viewers a glimpse of events that are to come. These event names can include links for viewers to find out more details about the event.

Another option is a “news” page, that is frequently updated with the latest news and events from downtown Escanaba. This may include profiles of new businesses that have recently opened, new development plans that are in the works, grants or awards the City has received, or other noteworthy news that is relevant to the downtown.

The website should provide maps and guides to visitors as well as inviting photographs of events and activities. Maps of business locations, public parking lots, and other attractions should be included to help visitors navigate to and through the downtown. Photographs help visitors visualize the downtown. Capturing the right settings in a picture can provide a powerful visual appeal to attract visitors and local shoppers alike.

Finally, the website should also include links to all other websites of community groups and institutions, including Bay College. This type of guidance and cross-marketing can better inform website visitors of the community amenities Escanaba has to offer.

Continue Promotional Efforts

The DDA should continue the variety of promotional efforts downtown and coordinate promotional efforts with retailers on Lincoln Street. These promotions do not have to be large scale events, but could include smaller promotional efforts such as a “Fall Sales Fest” where merchants extend their hours on a Friday and Saturday and offer promotional discounts to attract shoppers.

In approaching promotional efforts, the DDA and downtown businesses need to think of themselves as an open air mall, working in conjunction to set store hours and promotional efforts. The DDA Director should be authorized to serve as the “mall manager,” guiding special sales and promotions and negotiating best business practices among the various merchants.

The Downtown should also work to coordinate promotional efforts with businesses on Lincoln Street and elsewhere in the community. For example, if the auto dealers join together for a city-wide promotion, the downtown should be holding a promotion on the same day. The auto dealers’ promotion and advertising will likely draw shoppers from a wide region, hoping to find a good bargain on a car. Even if they don’t find the auto deal they were looking for, they shouldn’t leave Escanaba empty-handed.

Utilize the Waterfront

The Little Bay de Noc is a recreational asset for the City of Escanaba, and can be useful in attracting some curiosity seekers to Escanaba’s downtown. It is evident through the numerous waterfront parks that the community recognizes this fact.

While we believe that the waterfront should be better utilized as an attraction to downtown Escanaba, it is of lower priority than the other recommendations in this report. The waterfront can serve as an attraction, but only after other items have been addressed to make the downtown more appealing to residents, students, and visitors. We recommend that the City of Escanaba continue efforts to improve the utilization of the waterfront through clean beaches, trails, parks, and boat launches throughout the City.

We also recommend the creation of a wooden boardwalk along the waterfront, similar to the one in Manistique. A boardwalk would allow residents and visitors to walk right along the water and enjoy the bay. This would create another compelling reason for residents and visitors to pass through the downtown, increasing traffic and visibility.

Downtown Marketing Tools

This section of our report addresses several specific action items that apply generally or to larger portions of the downtown, but are highly recommended to catalyze economic growth and improvements for the community. These projects may not be entirely new to Escanaba, but it is essential that they be documented as specific action items that should be addressed proactively.

1. *Be organized:* Before a concerted marketing or business recruitment and retention effort can start, the community should get organized. Active and motivated merchant groups can accomplish more with a single focus than with multiple, overlapping efforts.
2. *Be pro-active and creative with promotions:* An active downtown organization should have an identity and logo, and should produce events and organize promotions that make the downtown attractive to existing tenants and prospective retailers. Events should be prominently marketed and connected to the downtown, and maps for the event should clearly denote the downtown shopping district.
4. *Pursue business retention before recruitment:* Even more than recruitment, retention is critically important to downtowns. Before new tenants are recruited, it must be clear that existing merchants are valued and wanted.
5. *Talk to your existing retailers and valued businesses:* One way to work on retention and recruitment simultaneously is through effective communication with existing merchants. Focus group sessions are helpful, but sometimes it is necessary to go door-to-door for one-on-one discussions, or to conduct phone interviews. This way, you can discover wants and needs, and learn of the biggest challenges confronted by current retailers.
6. *Carefully consider the appropriate retail mix:* Use the information from your existing retailers to think carefully about tenant mix. Downtown Escanaba currently has a mix of retail and service based businesses. The location of these businesses relative to one another is also important. Strong retail corridors have a number of stores in a row without being broken up by too many service based businesses. Business clustering is important for getting visitors to become cross-shoppers.
7. *Recruit and pursue new retailers:* Retailers consider a variety of criteria when choosing a location, including population and income, parking options, community image, traffic counts and vehicular speed, proximity to other retail and competition, access and visibility, and jurisdictional growth policies. All of these and related factors should be considered when approaching new tenants.

8. *Inventory local resources and amenities:* Continue to inventory your resources so you can impress potential new businesses. The community should be prepared to brag about its active downtown merchants group, market strategy, water resources, recreation and parks, redevelopment plans, streetscape and scenescape facade program, high school, library, museum and other resources.

9. *Tune into the competition:* Competing markets are often pursuing the same prospective retail recruits. You not only need to be aware of them, but also to learn from them as well. The City leaders, DDA Director, Chamber Director and downtown merchants should know Marquette, Menominee and Iron Mountain. They should be very aware of events, organizations and agencies, and promotional web sites in the surrounding communities.

10. *Maintain a current consumer guide:* Another excellent recruitment and retention piece is a consumer guide which is distributed to all downtown employees and visitors. Such a guide is often accompanied by a map, and can provide coupons and information on downtown restaurants, entertainment and retailers, their hours of operation and location. Publication costs can be paid for through advertising. These consumer guides should be distributed to incoming first-year College students as part of a “Welcome to Escanaba” packet.

11. *Recruit and utilize volunteers routinely:* Several successful business recruitment and retention programs use volunteers to visit businesses, in addition to salaried city staff members. Volunteers may be downtown merchants, or leaders from local libraries, museums and associations. High school or college students may even be recruited as part of a class program.

12. *Utilize matchmakers and local business expertise:* Consider retaining a licensed and professional local broker to approach prospective developers, tenants and businesses. A commercial real estate broker with interest in the downtown’s success will maintain a catalogue and brochures (cut-sheets) of all the available properties and their size, condition, sale price or rent structure, prior use, duration of vacancy, and other pertinent information of interest to potential tenants. The broker may collect a commission from the representative landlords or sellers to include their property on a flyer, brochure or in facility tours.

13. *Advertise in any vacant windows:* Instead of leaving bare and dirty windows in vacant space, create a city-wide and easily recognizable Information Poster in the window with a general description of the available space/property and place the poster in the window for passersby. Also, with the permission of the property owner, the

vacant window space can be used for holiday decorations, showcasing art from local artists or from children at the area schools, or advertising events occurring at Bay College.

14. *Build a network of referrals:* When volunteers are conducting interviews with existing businesses and merchants, they should always ask, “Do you know anyone who might be interested in locating downtown?” Volunteers can then follow up by contacting such prospects for in-person meetings. After contacting referrals on the phone, they should be invited for a general tour of available properties, but with no pressure to disclose intentions.

15. *Practice cross-promotion:* Merchants and businesses should engage in friendly conversation with approachable customers, and invite them to visit other shoppes and establishments within the downtown. If existing merchants do not have a specific item that a customer is seeking, it is always much better to send them across the street to the “competition” than send them away from the downtown. Better yet, offer a coupon for 10% off one purchase at a complementary store. In a downtown setting, any dollar spent will benefit all, and hopefully generate return trips and longer shopping excursions.

16. *Identify & pursue market niches:* Developing downtown niches takes thinking about retail mix a bit further. Niches are special market segments that can be based on several things:

- A group of customers such as teens, college students, independent entrepreneurs, young professionals, impulse shoppers, and pass-by visitors
- Specific kinds of goods or services, such as furniture, home furnishings, children’s clothing, or entertainment
- Shopping environments like a pedestrian mall, a unique museum, or the waterfront are a destination in and of itself.

17. *Consider creative adaptive re-use:* As the prime location of older or historic buildings in their regions, many downtowns are anxious to capitalize on their ambiance by adaptively re-using the space within. When recruiting you might want to think about what kind of businesses might benefit from the special spatial benefits or situations offered by older buildings. For example, warehouse buildings are often successfully converted into galleries and artist’s live/work units and renter-occupied condominiums.

18. *Merchant Workshops:* A variety of workshops should be held on a regular basis to discuss methods and techniques merchants can use to increase sales. Topics to be covered include store hours, leaving the best parking for customers, customer service

techniques, marketing techniques, etc. These workshops can be led by a local merchant(s) or outside experts can be brought in. Time should be provided for an open discussion for merchants to share ideas.

19. *Improved Signage*: Better signs are needed to guide visitors around downtown. This includes signs for parking, public amenities (public bathrooms, pay phones, etc.), gateway signs, etc. These signs should include a common color theme and logo, preferably one that represents the City and its identity. In addition, sign ordinances should be created and enforced to ensure that signs are uniform and attractive and enhance the downtown aesthetics.

20. *Streetscaping and Scenescaping*: Continue the streetscaping and scenescaping efforts throughout the downtown. Push for a distinct, uniform look throughout the downtown by addressing not only signage (as described above), but also pedestrian-friendly amenities like benches, bike racks, small urban parks or pocket-parks, etc.

21. *Avoid Negative Signage*: Negative signs such as “No dogs allowed” or “No rollerblades in store” create a negative atmosphere that can effect the shopping experience for a patron, even if the sign does not apply to them. Consider rephrasing these signs in a positive manner to present a more welcoming entrance to the store.

22. *Media Marketing Campaign*: Launch a media marketing campaign, including weekly stories or a dedicated column in the local newspaper promoting the downtown and informing residents of recent changes and upcoming events. Continue this media campaign with similar stories on local radio and television news shows. Use this campaign to keep Downtown Escanaba fresh in the minds of potential shoppers.

5.0 Find Your Niche

Introduction

With the “Find your Identity” portion of the strategy, we recommended that Escanaba establish itself as a historic Marina City with a modern Ferry and Port-o-Call, enhanced by beaches with boardwalks and natural vegetation. The downtown can play off of this theme to visitors, travelers and vacationing families. With this identity, a small amount of tourist shops, boutiques and gift shops may be supportable within a short walking distance of the ferry docks and marinas. However, they will not represent the retail core.

The retail core or ‘niche’ for Escanaba will depend upon the daily, weekly, monthly and yearly needs of its resident families. The most loyal resident shoppers will be seeking the basics like food, clothing, and furnishings to run the household smoothly. Other essentials and staples may include office and school supplies, pet supplies, appliance and tools.

Hardlines - Overview

One of the greatest strengths in the downtown is the number of existing hardlines retailers. These retailers draw shoppers from a wide region, especially for big-ticket items such as appliances, electronics, and furniture. These businesses are enhanced by compatible retailers such as paint and wall coverings and sewing and upholstery. Some of the current businesses dealing with hardlines include:

- T&T True Value Hardware
- Mammoth Granite Countertops
- Pioneer T.V. and Appliance
- Schwalbach Kitchens
- Industrial Sewing & Upholstery
- Totally Custom Cabinetry
- Sviland Paint and Wall Coverings, Inc.
- Sherwin Williams

We recommend that the Escanaba DDA actively recruit new business to fill gaps and niches among this same retail mix, and with a clear and deliberate focus on categories already proven to work. The focus should be on:

- Furniture
- Home Furnishings
- Electronics
- Appliances
- Automotive Supply
- Office and Home Supply
- Home Improvement

Automotive - Overview

The length of the downtown creates the opportunity for multiple nodes of activity. An automotive cluster makes sense near Northern Motors on the western end of the DDA district. This does not interfere with the retail core, and creates another destination to attract shoppers downtown. A few of the current automotive-related businesses include:

- A-1 Auto Paints & Supplies
- Auto Value
- Brian's Auto Glass
- Econowash
- Hot Rods
- Jerry's Automotive
- Ludington Auto
- Northern Motors
- Performance Audio & Restyling

Automotive retailers are not typically considered 'ideal' for a traditional and historic downtown district. However, they can also contribute significantly to the regional draw, as customers are more willing to drive further for these and related services.

For a large retail district the size of Escanaba's, automotive dealerships, supply stores and services are certainly complimentary and valued - as long as they don't lock up prime space that might be suited better for other businesses, as long as the properties are highly maintained, and as long as the owners follow best business practices.

Restaurants and Eateries - Overview

Downtown Escanaba has a favorable selection of restaurants and eateries, with unique options that attract visitors from outside the community. These restaurants serve as destinations, pulling potential shoppers into the downtown. A few of the notable dining establishments include:

- Hereford & Hops
- D & M Subs
- Babaloons
- Hong Kong Buffet
- House of Ludington
- The Stone House
- Ramido's Subway Shop
- Muellers Pizza
- Fernand's Mexican Cantina
- Schooners Cafe
- Baron's Bar
- Downtowner Restaurant
- Swedish Pantry
- 8th Street Coffee House
- Rosie's Dinner

Apparel and Softlines - Overview

The current retail mix in downtown Escanaba is heavily weighted in a few categories like restaurants, limited service eateries, and services, but relatively light in other categories like apparel. This is mostly attributed to attractive 'choices' that chain stores have along Lincoln Street, together with a preference for clustering and access to drive-by traffic.

The Morrison Shop is a long-time and valued merchant, but the downtown lacks a cluster of similar businesses that would typically encourage cross-shopping and multiple shopping trips.

Clothing stores in particular will rely upon drive-by traffic, impulse shopping and brand-name recognition, and are not generally considered 'destination' stores. In comparison, automotive supply, furniture, electronics, home improvement and appliance stores are all regional destinations, and rely less upon drive-by traffic.

There is a clear and measurable gap and opportunity for quality family, men's and women's apparel stores in Escanaba. In fact, it is reasonable to expect that the community could attract stores like TJMaxx, Marshall's, Burlington Coat Factory, Old Navy, Lane Bryant and even a brand new, larger JCPenney. However, these brands are likely to prefer locations along the main thoroughfare through town, and will also seek to cluster near existing apparel stores and discount department stores.

It is possible that some apparel stores could be attracted into the downtown district, particularly if they are in specialty categories (like Bras that Fit). However, we prefer to recommend retail categories that are most likely to be successful in the downtown district, and that will benefit by cluster together with established businesses, creating synergy and critical mass. For this reason, our recommendations for the downtown focus on hardlines.

Sporting Goods - Overview

Escanaba benefits from a local and regional enthusiasm for sports, particularly outdoor sporting. The Upper Peninsula is well known for its sporting appeal in fishing, boating, hunting, snowmobiling, skiing, biking and camping. Even with national sporting good chains like Dunham's in Escanaba, there is still a clear opportunity for another sporting goods destination retailer, with a specialty outfitter.

In completing the supply /demand analysis, we determined that there is opportunity for as much as 112,000 square feet of additional retailers among 34 categories, and significant opportunity to better meet the wants and needs of residents families, as well as college students and visitors. We elaborate on these opportunities later in our report.

Conclusion

New business recruitment can be difficult and time consuming, potential and existing businesses will need local support and encouragement to see the opportunity and assume the inherent risk of opening a new establishment. We recommend that the DDA work to encourage retail clustering in the downtown. In other words, the DDA should encourage businesses that work well together to locate near one another to create better cross-shopping opportunities.

As an example, a specialty store selling lamps and illumination would do well located near store selling kitchen cabinets, and a store selling flooring and tile would do well next to other stores selling draperies, blinds, curtains and quality linens. Similarly, a fabric store would do well next to an upholstery store, and a sporting goods would perform well next to an embroidery or silk screening shop.

These types of clustering leads shoppers to make unplanned stops at stores they walk past on their way to their destination. Or, that shopper may decide to make a return visit to the downtown based on something they saw in a window. This type of marketing uses the drawing power of each individual business to create better visibility for neighboring businesses, similar to a shopping mall.

The length of Ludington Street creates the opportunity for a number of small clusters in the downtown. These clusters should not be exclusively one type of retail, in fact, some mixing of retail types is beneficial for introducing shoppers to new stores. However stores in a particular cluster should be located near each other to make it easy for shoppers to walk from one store to another of the same retail type.

Downtown Escanaba should also focus on the needs of Bay College students, who often are unaware of the retail options that are available downtown. These students are seeking value in the basics needed to furnish a dormitory room or small apartment. This may include value-prices small electronics, bargain books, ready-to-assemble furniture, bunks and bedding, bicycles and skateboards, and video entertainment equipment.

5.1 Retail Opportunity - Details

Our recommendations for Downtown Escanaba reflect our analysis of the retail expenditure data for 34 unique categories and an assessment of the downtown's ability to intercept sales from its own area residents and surrounding communities. We evaluated the share of income that 'typical' shoppers spend in each category, and compared this resident expenditure potential to the retail supply within the project's effective trade area to identify any market *gaps*.

We have also qualified the opportunity for a variety of other unique market considerations, including site and locational characteristics, local economics, and significant retail events. We also examined strategic considerations and retail concepts like clustering, critical mass, synergy, connectivity, merchandise mix, import / export, and sales transfer, impact or "cannibalization."

Based on the results of our supply - demand analysis and qualified by our visits to the market, we have determined that there is support for over 112,000 square feet of additional retail space in the trade area. Table 7 displays the category and potential square feet of new or expanded space for various retail categories that present opportunity for growth in the downtown.

The results of our analysis represent the best opportunity for a successful new store or expansion. However, this opportunity is based on the assumption that the business is well-run and follows the recommendations presented in this report. In addition, while this analysis identifies the best opportunity for new or expanded retail, it does not mean that retail categories not mentioned in this section will necessarily be unsuccessful. The success of any business depends on a number of factors and market conditions, especially the management of the operation.

A good cluster of quality restaurants and hardlines like home furnishings, electronics and appliances, hardware, and sporting goods help create a regional draw, whereas convenience retail primarily meets the needs of local residents and nearby neighborhoods. Therefore, we consider categories like restaurants and hardlines to hold the highest potential and should be given the highest priority.

Our retail analysis also found strong opportunity for other categories such as apparel, pharmacy, and general merchandise, but these categories may be more difficult for the downtown to attract due to the competition and available space near the mall. New apparel stores can succeed downtown, but only if a critical mass of 4 to 5 quality apparel stores are clustered together in the downtown.

EXHIBIT 7. Downtown Escanaba Opportunity by Retail Category

Downtown Escanaba Retail Opportunity		ETA	Downtown
NAICS	Description	Potential Sq. Ft.	Potential Sq. Ft.
44221	Floor Covering Stores	8,000	4,000
442299	All Other Home Furnishings Stores	5,000	3,000
443111	Household Appliance Stores	5,000	2,000
44312	Computer and Software Stores	3,000	1,500
44413	Hardware Stores	6,000	3,000
44421	Outdoor Power Equipment Stores	1,000	500
44512	Convenience Stores	9,000	4,000
4453	Beer, Wine, and Liquor Stores	9,000	4,000
44611	Pharmacies and Drug Stores	30,000	10,000
44612	Cosmetics, Beauty Supplies, and Perfume Stores	2,000	1,000
44613	Optical Goods Stores	2,000	1,000
446191	Food (Health) Supplement Stores	1,000	1,000
446199	All Other Health and Personal Care Stores	2,000	1,000
44811	Men's Clothing Stores	3,000	2,000
44812	Women's Clothing Stores	12,000	5,000
44813	Children's and Infants' Clothing Stores	2,000	1,000
44814	Family Clothing Stores	16,000	6,000
4482	Shoe Stores	4,000	2,000
44831	Jewelry Stores	3,000	2,000
45111	Sporting Goods Stores	20,000	8,000
45113	Sewing, Needlework, and Piece Goods Stores	5,000	2,000
451211	Book Stores	6,000	2,000
452	General Merchandise and Variety Stores	92,000	8,000
4532	Office Supplies, Stationery, and Gift Stores	1,000	1,000
4533	Used Merchandise Stores	8,000	3,000
45391	Pet and Pet Supplies Stores	4,000	2,000
45392	Art Dealers	1,000	1,000
71312	Amusement Arcades	2,000	2,000
71399	All Other Amusement and Recreation Industries	6,000	2,000
7221	Full-Service Restaurants	32,000	12,000
722211	Limited-Service Restaurants	20,000	8,000
7224	Drinking Places (Alcoholic Beverages)	4,000	2,000
812112	Beauty Salons	7,000	3,000
812310	Coin-Operated Laundries and Drycleaners	4,000	2,000
Total Potential Square Feet		335,000	112,000

Floor Coverings and Home Furnishings Stores

Downtown Escanaba has opportunity for up to 7,000 square feet of new or expanded space in floor coverings and home furnishings. Home Furnishings are defined as merchandise that is used to decorate or furnish a home, but does not include furniture. This does include floor covering, window treatments, lighting fixtures, cabinets and hardware, etc.

This opportunity would be best met through an expansion of current home furnishing stores, or with one new specialty store. This new store could specialize in carpet, tile, laminate and vinyl flooring, illumination, window treatments, etc. This store should focus on service and unique product to compete with larger national chain stores that will be able to offer products at a lower price.

Electronics and Appliances

Downtown Escanaba has opportunity for up to 3,500 square feet of new or expanded space in electronics and appliances merchandise lines. This opportunity could be met through one new store, or the expansion of current stores. We recommend that any new or expanded business emphasize service and selection to their customers.

An overlooked electronics merchandise line are items like personal digital music players, commonly known as MP3's. These items are popular with college and high school students as well as mature shoppers that desire the latest technology.

Currently, the most popular and widely recognized MP3 player is the iPod, developed by the Apple Corporation. Our research indicates that there are currently no locations in the upper peninsula to purchase Apple products, with the closest stores in Green Bay, Wisconsin. While Apple does have their own retail store chain, many of their retail locations are independent merchants. We recommend a new independent computer dealer with a full line of Apple products open a store in the downtown. This unique and highly desirable merchandise line would draw shoppers from across the upper peninsula in search of the latest technology.

Hardware Stores and Outdoor Power Equipment

Downtown Escanaba has opportunity for up to 3,500 square feet of new or expanded space in hardware and outdoor power equipment. We recommend this opportunity be met through an expansion of current hardware, power equipment, and building supply stores in the downtown. With the anticipated opening of an expanded Menard's building supply store, a new hardware store would struggle to compete in the market.

Convenience Stores and Beer, Wine, and Liquor Stores

Downtown Escanaba has opportunity for over 8,000 square feet in convenience and beer, wine, and liquor stores. We recommend this opportunity be met through one new neighborhood convenience and specialty grocery store to serve residents on the eastern end of the downtown. This store should offer convenience items, but could also offer specialty items not found in larger grocery stores including a wide selection of organic produce, fine cheeses, and a wide wine selection. This store should position itself upscale from existing grocery stores without alienating the large working-class population of the city.

Pharmacy, Health, Nutrition, and Personal Care

Downtown Escanaba has opportunity for up to 14,000 square feet of new or expanded space for pharmacy, health, nutrition, and personal care items. This includes cosmetics, beauty supplies, optical goods, health foods, and other personal care items. We recommend that this opportunity could be met through one new store offering a wide variety of health and personal care items, or through a few smaller specialty stores.

A larger store would be optimal, as it could serve as an anchor tenant to attract shoppers to the downtown. This store could be a traditional pharmacy, or it could emphasize one or two specialties while offering a variety of other items.

Apparel

Downtown Escanaba has opportunity for up to 18,000 square feet of new or expanded apparel retail. This opportunity is spread across a variety of sub-categories, including men's, women's, children's and family clothing stores. This opportunity could be met by up to six stores, or could be combined into a few, larger retailers.

Family clothing presents the greatest apparel opportunity in the market. A number of apparel categories could be combined to provide opportunity for up to 9,000 square feet in family apparel with items like menswear, infants and children's clothes, fleece and flannel, sporting apparel, and youth fashions. These stores should also cater to the college crowd that often prefer items like jeans, t-shirts, fleece, and casual brand names.

There is opportunity for one or two new or expanded women's clothing stores. These stores should offer modern and trendy apparel, without overlapping with the merchandise in existing stores. Any new stores should be located within walking distance of existing women's stores to create a cluster effect and draw in more shoppers that will take advantage of the opportunity to cross-shop between multiple stores, just as they would at a mall.

The key for small, independent apparel stores is to offer higher levels of service, unique selections of merchandise, and special promotions. Independent and local clothing stores need to give shoppers a compelling reason to shop the traditional downtown district as well as more contemporary malls.

In addition, up to 2,000 square feet of shoe store space is possible, but only if other new apparel stores have also opened downtown. This opportunity could be met in an expanded existing store offering athletic, dress, or casual shoes, or work boots.

There is opportunity for a new or expanded jewelry store in the downtown. Independent jewelers can compete effectively against large chain jewelers by focusing on service and knowledgeable sales staff. A jeweler that takes the time to educate their customers on the way to judge a diamond or other fine merchandise will build trust that will lead to customer loyalty in the future.

Sporting Goods Store

Downtown Escanaba has opportunity for up to 8,000 square feet of new or expanded space for a sporting goods store. This opportunity should be filled by a store that specializes in fishing, hunting, and outdoor gear. The region is known as a top-notch fishing destination and should have the equipment to outfit local anglers and visitors alike. Again, this store should focus on quality service and knowledgeable sales staff to satisfy the needs of their customers.

Sewing, Needlework, and Piece Goods Stores

Downtown Escanaba has opportunity for up to 2,000 square feet of new or expanded sewing, needlework, and piece goods stores. This store should provide selection that isn't available in larger chain and general merchandise stores, and offer the customer service and knowledge to back it up.

Book Stores

Downtown Escanaba has opportunity for up to 2,000 square feet of new or expanded space selling books and similar items. We recommend that this opportunity be met through one new store that specializes in merchandise catered to a specific category of shoppers.

Existing and new bookstores should also cater to College students, offering books covering a number of interests including art, architecture, science, technology, travel, sports, etc. These stores should also compete with the College bookstore by selling new and used textbooks for students, and offering to buy back used textbooks at the end of the semester.

General Merchandise

Downtown Escanaba has opportunity for up to 8,000 square feet of general merchandise. This opportunity would be best met through a dollar store, however the DDA should be careful to recruit a store that is willing to fit in with the downtown fabric and architecture instead of a typical one-story prototype chain store. This store can serve as a downtown anchor and provide convenient general merchandise for local residents.

The DDA presented us with the idea of a community-owned mercantile store. This concept might be supportable, depending upon the merchandise mix, management structure, location, etc. However, we do not feel that this concept is a solution for the downtown, and the DDA should not exert too much time and effort into this concept.

Office Supply and Stationery

Downtown Escanaba has opportunity for up to 1,000 square feet of new or expanded space for office supplies and stationery. We recommend this opportunity be met through the expansion of current stores already located downtown.

Pet and Pet Supply Stores

Downtown Escanaba has opportunity for up to 2,000 square feet of new or expanded space for pets and pet supplies. We recommend this store focus on service, with knowledgeable staff ready to answer questions regarding the needs of a wide range of pets.

Art Dealers

Downtown Escanaba has opportunity for up to 1,000 square feet of new or expanded space for an art gallery. This new or expanded store should find creative ways to display art for sale, including displays in restaurants, professional offices, and other retailers downtown. A new art gallery should attempt to cluster with existing art galleries or home furnishing stores to gain benefits from cross-shoppers.

Entertainment and Recreation

Downtown Escanaba has opportunity for up to 4,000 square feet of new or expanded space for entertainment and recreation. This opportunity could be met through a number of venues including a video arcade and laser tag facility. This new store can offer recreation opportunities to residents and visitors, as well as host parties. While this facility would be a valued tenant for the downtown, it should not be located in the retail core of the district. A better location would be along Ludington Street between Lincoln and 13th Streets, preferably near the Jr. High School.

Full-Service Restaurant

Restaurants are currently one of the biggest strengths of Downtown Escanaba, still there is opportunity for up to 12,000 square feet of new or expanded space for a full service restaurants. We recommend this opportunity be combined with the opportunity for a drinking establishment (listed below) to create 3 or 4 new fine dining restaurant in downtown Escanaba. These restaurants should focus on a cuisine that is not currently featured in the area.

This restaurant should serve the finest food in the community without becoming too costly or extravagant. This restaurant should cater to business lunches and dinners, couples celebrating anniversaries and other occasions, as well as other patrons who enjoy fine dining in an upscale atmosphere.

The facility should be attractive in a quiet atmosphere, with white tablecloths and cloth napkins. We recommend utilizing an existing historic structure in the downtown and revitalizing its aesthetic charm and appeal.

Limited-Service Establishment (Deli, Coffee Shop)

Downtown Escanaba has opportunity for up to 8,000 square feet of new or expanded space in limited service dining. We recommend this opportunity be met through up to 4 new establishments, including a new downtown coffee shop to compliment the 8th Street Coffee House. This establishment should also serve bagels, muffins, sandwiches, etc. and provide a warm and cozy seating area. This facility should also consider providing free wireless internet access, otherwise known as a “wi-fi hotspot.”

This type of establishment can bring new energy to the downtown through the increased foot traffic, attracting new shoppers downtown. This facility could serve to introduce new patrons to the downtown, including College students and faculty that may not normally visit the downtown or think of it as a place they would like to shop. This increased traffic and flow of new patrons will help neighboring businesses by increasing the visibility of the downtown.

Drinking Establishments

Downtown Escanaba has opportunity for up to 2,000 square feet of new or expanded space for drinking establishments. We recommend this opportunity be met in conjunction with the opportunity for full-service dining through the creation of a new fine dining restaurant, as explained above.

Personal Care Services (Hair Salons)

Downtown Escanaba has opportunity for up to 3,000 square feet of new or expanded space in personal care services. This opportunity should be met by one or two new businesses that offer services such as hair care or weight loss services.

Dry cleaning & Laundry Services

Downtown Escanaba has opportunity for up to 2,000 square feet of new or expanded space in dry cleaning and laundry services. Because this category is a service, and does not sell retail merchandise, it does not make sense for an existing business to expand its store area. Therefore, we recommend this opportunity be met through existing businesses, through an expansion of hours or services provided such as delivery or pick-up to residents to meet the opportunity for expanded dry cleaning and laundry services.

6.0 Recommendation - Cool Cities Designation

We recommend that the City of Escanaba seek designation as a “Cool City.” In June of 2003, the governor initiated the “Cool Cities” program for the State of Michigan. The program’s initiative is to utilize an urban strategy to revitalize communities, build community spirit, and retain the State’s “knowledge workers.” The program has since expanded to include several targeted programs, which include “Cool Cities Michigan Main Street Program,” “Cool Cities Blueprints for Michigan’s Downtowns,” “Cool Cities Blueprints for Michigan’s Neighborhoods,” and “Cool Cities Neighborhoods in Progress.”

Why Escanaba?

The City has what it takes to attract and retain young and creative people to build a knowledge based economy. There is a concentration of State of Michigan employees in Escanaba, in addition to Bay College and numerous independent entrepreneurial endeavours. The City is well positioned along Little Bay de Noc and has a strong outdoor sports and leisure feel to compliment its historic charm and friendly people.

Benefits

There are numerous benefits to being awarded a Cool Cities grant, the grant can be used towards:

- Project Funding
- Marketing
- Neighborhood and Historic Preservation
- Economic Development
- Business Climate Improvement
- Arts and Culture Support and Development
- Image and Identity Creation and Support
- Transportation Improvements
- Tourism Promotion
- Resident attraction / retention

Requirements

Cool Cities is a model economic tool for the State and involves a high level of training and education. State of Michigan staff and consultants are required to obtain a minimum of three years of training and technical assistance. The requirements for a municipality to qualify for a Cool Cities grant vary from program to program under the Cool Cities umbrella of programs, however the over arching requirements of the program include a local commitment of staff, organization, and financial support.¹

Case Study - Iron Mountain

The City of Iron Mountain has been designated a “Main Street” City as part of the State’s Cool Cities Initiative. As a Main Street City, Iron Mountain will hire a Main Street Coordinator whose purpose will be to enhance the immediate downtown.

The City will receive \$300,000 worth of services over the next three years, including more than \$200,000 in technical assistance and training as part of a long-term management approach to revitalizing and maintaining a successful downtown through organization, promotion, design, and economic restructuring. The primary focus for Iron Mountain is to create a sense of community and to become an economic hub for the region.

1. More information on program requirements and Request for Proposals can be found on the Cool Cities website at <http://www.coolcities.com/>.

7.0 Parking Assessment

7.1 Current Downtown Parking Situation

Downtown Escanaba currently has parallel parking on both sides of Ludington for the entire two miles through the DDA district. In addition, side streets offer a mix of parallel and angle parking, and 10 DDA parking lots and 4 municipal lots provide additional parking options. We have created a map of public parking lots and included it in the appendix to this report.

During our assessment of the parking conditions downtown, we did not observe any parking deficiencies in any part of the DDA district. While parking activity was heavy along Ludington Street, spots were usually available within a block of any store, and most parking lots remained mostly vacant. In fact, we only observed two out of fourteen parking lots that were more than half full. The following table shows the results of our assessment, and the utilization rate of the fourteen lots we observed.

EXHIBIT 8. Parking Assessment Table

Parking Lot	DDA Lots										City Lots			
	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Objective Counts														
Access Points (#)	3	4	4	3	4	2	4	2	2	1	2	4	4	3
Access to Stores (#)	1	2	1	3	5	1	1	1	1	2	0	0	2	1
Handicap Spots (#)	2	0	1	0	0	0	3	0	0	0	0	0	4	4
Spaces (#)	46	56	58	40	59	15	50	24	24	18	30	44	80	83
Usage (#)	30	14	11	13	54	5	3	11	4	3	6	15	31	28
Utilization (%)	65%	25%	19%	33%	92%	33%	6%	46%	17%	17%	20%	34%	39%	34%
Scoring Assessment (0=Poor, 1=Fair, 2=Good, 3=Excellent)														
Visibility	1	0	2	0	2	0	2	0	1	2	1	0	2	0
Landscaping	0	0	0	0	0	0	0	0	0	0	0	0	2	0
Signage	2	1	1	1	2	0	1	0	1	0	0	0	1	0
Illumination	2	2	2	1	2	1	2	0	0	1	0	0	3	2
Surface Condition	1	1	2	2	2	1	1	1	1	0	2	1	1	2
Totals (15 Points Possible)	6	4	7	4	8	2	6	1	3	3	3	1	9	4

The conditions of the lots were adequate, with only minor repairs and fresh paint needed for most lots. However, the visibility of these lots was poor, as most are located 1st Avenue North and 1st Avenue South behind the businesses fronting on to Ludington Street. These lots are difficult to find for those who are unfamiliar with the downtown.

7.2 Parking Recommendations

We firmly believe that Downtown Escanaba has sufficient parking for today's retail environment and for years to come. This conclusion is based upon our observations over the course of several days during multiple trips to the market, as well as the results of the shopper survey, which indicated that over 90% of shoppers surveyed had no trouble finding a place to park.

This aside, we also recommend reconfiguring the parking on Ludington Street from parallel to angle parking between 13th and 9th streets. This change should increase street parking in the core retail area, the area that had the highest parking utilization in our assessment. While this change is recommended for retail reasons, it will also alleviate parking problems in this four block area.

We do not recommend converting any portion of Ludington Street into a boulevard. While we recommend that a four block section change from parallel to angle parking with one lane of traffic in each direction, we recommend the rest of Ludington Street remain four lanes of traffic to maintain the current traffic flow to and from the core retail area. Converting large portions of Ludington Street to a boulevard will require resources that should be prioritized on other projects in the downtown.

When implementing any changes to the structure and layout of Ludington Street, we recommend integrating the bike path plan that has been created for the city. These changes should be done simultaneously to minimize any disruption and to ensure angle parking and bike paths work well together.

We recommend discontinuing the lease of the gravel parking lot located at the southeast corner of 14th Street and 1st Avenue North. Our observations indicate that this lot is underutilized, and its location does not support the retail core of the downtown. In addition, its poor surface condition creates an unattractive appearance for the downtown, and does not present the appropriate image for visitors, especially those visiting for the first time. We recommend the DDA end their lease of this lot, and put their funding to better use elsewhere in the downtown.

We also recommend increasing the size and number of directional signs to parking lots. During our assessment, we made numerous trips down Ludington Street, watching for parking signs. While we consistently saw signs on Ludington directing us where to turn, once we were on the side streets there were no more signs to navigate us to the lots. While some of these lots were visible and evident from the sidestreets, others were not, with access points located in the middle of a block on 1st Avenue North or South.

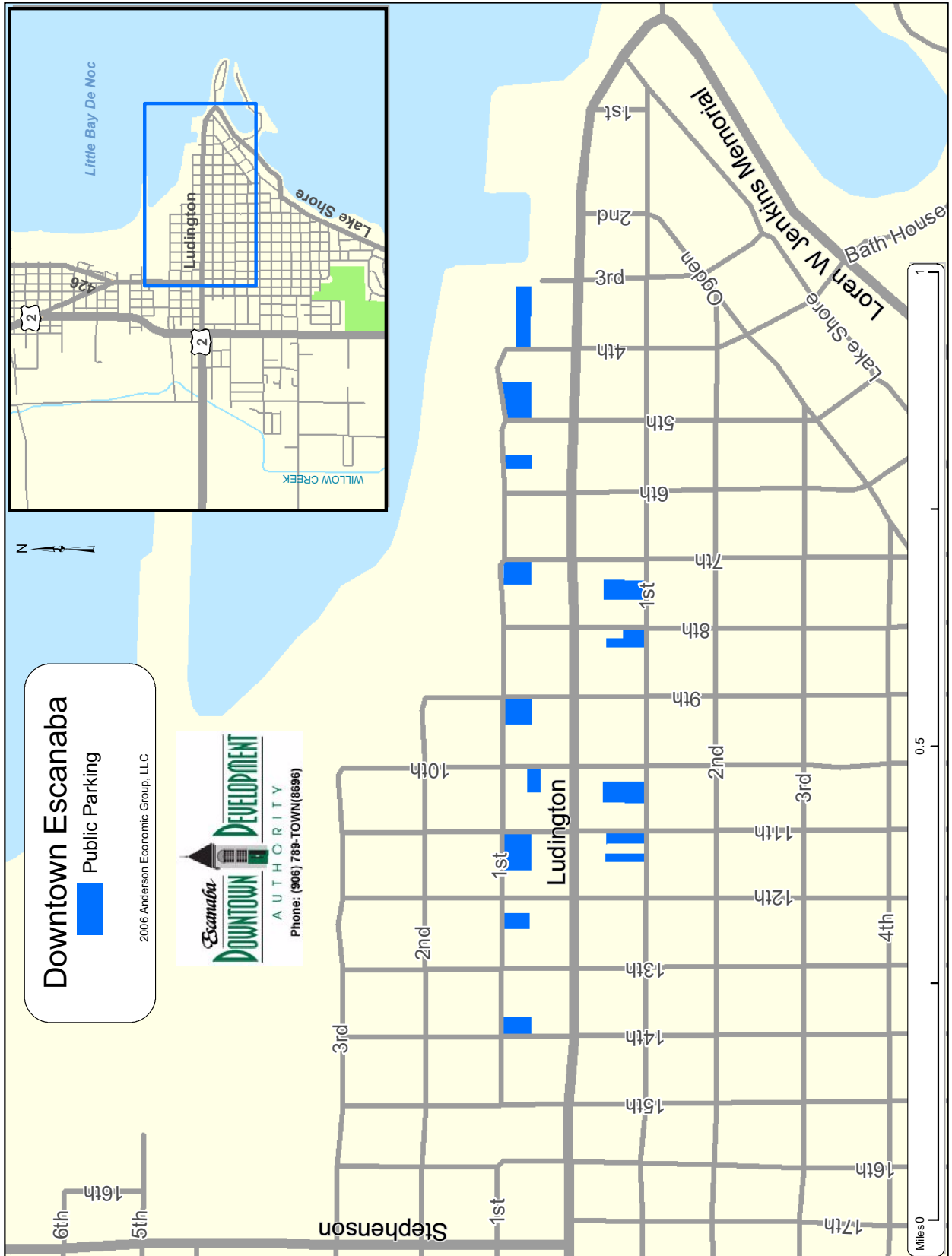
Parking lot directional signs should be obvious and ubiquitous, creating comfort for a visitor unfamiliar with the City. These signs should lead the driver all the way into the lot, and assume the driver has no knowledge of the city. Proper signage should increase parking lot utilization, increase shopper satisfaction, and decrease complaints of inadequate parking in the downtown.

Handicapped parking spaces appeared to be non-existent in most of the DDA lots. We recommend including more clearly marked handicapped spaces to accommodate those with limited mobility, especially as the large baby boom generation begins to face this problem. Some angle parking on Ludington should also be reserved for the handicapped to provide convenient service to this population.

We recommend eliminating all one-way streets in the downtown, unless there is a compelling traffic control reason to keep them. One way streets are confusing to those unfamiliar with the community, and may lead to frustration and a negative visitor experience in Escanaba.

Finally, we do not recommend establishing a trolley route in Escanaba. While a trolley would be a good solution for the length of the downtown, we do not believe that ridership will be sufficient to support its use. We recommend the DDA's resources be used elsewhere, and the focus be placed on retail clustering in the retail core to combat the problem of an oversized main street.

MAP 1. This map shows the location of public parking lots in Downtown Escanaba.



8.0 City of Escanaba - Ferry Proposal

8.1 Introduction

The addition of a high-speed Ferry in Escanaba could have significant economic benefits for its downtown, under the best of circumstances. For a dock location, we highly recommend that the City explore the feasibility of utilizing shorelines proximate to the existing City Administrative Offices. If the dock can be located with proximity, walkability and visibility to the downtown district, then the preliminary concept holds merit.

8.2 Planning and Research

In exploring the logistical feasibility of a high-speed ferry for the City of Escanaba, considerable research and due diligence is recommended, and as early as possible. The first steps should be to study the history, attributes, challenges and successes of other ferry projects. To assist with this step, we have conducted some preliminary research on four case studies, with results summarized in the following sections of this document.

If the City of Escanaba finds these case studies intriguing, then the next step is to conduct phone interviews with companies that already have demonstrated some interest in the ferry industry. During these interviews, Escanaba should seek to understand some of the biggest challenges and possible obstacles to launching a high speed ferry project. To assist with this step of the research, we have collected contact information for key names and companies that Escanaba should interview, as follows:

Contact Names and Addresses

Bob Manglitz
President
Lake Michigan Carferry Inc. - The Badger
South Williams
Ludington, MI 49431
Phone: (231) 845-5900

Jeff Fleming, Spokesperson
Lake Express Ferry, LLC
2330 S. Lincoln Memorial Dr.
Milwaukee, WI 53207
Phone: (866) 914-1010

David Lubar and Oyvind Solvang
Lubar & Co Inc. Investment Bankers
700 North Water Street
Milwaukee, WI 53202
Phone: (414) 291-9000

Mr. Robert Ruleau
Ruleau Robert & K
7256 M-35
Menominee, MI 49858
Phone: (906) 863-7082

Mr. Brian McCaughrin
McCaughrin Maritime Marine Systems Inc.
34660 Elm St., Suite 1001
Wayne, MI 48184
Phone: (734) 729-9362
FAX: (734) 729-7724
Mobile: (313) 418-6573
E-Mail: mmmsi@voyager.net

During these interviews, Escanaba should ask questions that would reveal the biggest challenges to a new ferry, and should also carefully consider the importance of partnerships with other communities in both Michigan and Wisconsin. If challenges identified early on appear to be surmountable, then the next step is preparation and prioritization of next-steps. We have identified just a few of the most important items that Escanaba should consider, as follows:

- Collaborating with other Ferry services
- Identifying possible regional and inter-state linkages
- Collecting funds and finances
- Recruiting support from partner communities
- Contacting port authorities and federal agencies
- Recruiting community input; conducting surveys and focus groups
- Reviewing regulations and legal restrictions
- Identifying a probable dock location
- Considering seasonality, pricing, etc.
- Formulating an aggressive marketing plan
- Forecasting ridership and revenues
- Conducting a financial pro forma analysis

- Developing a formal proposal
- Identifying a ferry manufacturer or existing vessels
- Securing insurance policies, developing exit strategies
- Identifying traveler accommodations, rental cars, hotels, shuttles
- Weighing trickle-through economic benefits, region-wide
- Seeking City, State and Federal approval
- Securing State funding for a financial feasibility study.

The first item is collaboration with other ferry services and communities in Wisconsin and Michigan. By pooling resources, time and effort with other communities, the challenges associated with such an undertaking should become more manageable. Partnerships will be essential for regional economic growth. Here are some of the communities that Escanaba should consider contacting and interviewing, including city managers, economic development corporations, chambers of commerce, downtown development authority, planning officials, port authorities and other stakeholders.

Partner Communities

- Escanaba, Michigan
- Algoma, Michigan
- Menominee, Michigan
- Traverse City, Michigan
- Frankfort, Michigan
- Sturgis Bay, Wisconsin
- Green Bay, Michigan
- Door County, Wisconsin
- Ludington, Michigan
- Muskegon, Michigan
- Milwaukee, Wisconsin

There may be a real opportunity for more than one ferry connection throughout the region, and the objective should be the creation of a ferry 'loop' that connects Michigan, its Upper Peninsula, Wisconsin, and Door County together. Ideally, a vacationing family would be able to complete the entire loop during a one- to two-week vacation. A variety and combination of linkages must be considered, with the overall objective of optimizing the appeal to patrons and vacationing families. Here are some of the possible linkages:

- Charlevoix to Escanaba
- Charlevoix to Algoma
- Charlevoix to Manistique
- Charlevoix to Menominee

- Escanaba to Charlevoix
- Escanaba to Sturgis Bay
- Escanaba to Frankfort

- Menominee to Sturgis Bay
- Menominee to Charlevoix
- Menominee to Frankfort

- Frankfort to Escanaba
- Frankfort to Menominee
- Frankfort to Algoma

- Algoma to Franfort
- Algoma to Escanaba
- Algoma to Traverse City
- Algoma to Ludington

- Ludington to Algoma
- Ludington to Escanaba
- Ludington to Manitowoc

- Muskegon to Milwaukee
- Milwaukee to Muskegon

8.3 Case Study #1: Muskegon to Milwaukee

The Lake Express Ferry is perhaps the best analog or case study for Escanaba. The ferry is relatively new and has been reported to be successful. A quick study of the Lake Express Ferry's attributes may provide some initial ideas for the City of Escanaba, and should also point to some of the questions that should be addressed during the planning stage for additional ferries:

- The Muskegon Lake Express takes 2 hours and 20 minutes, which is less than one-half the time of a conventional ferry. On this basis, it would take at least 3 hours for a ferry ride between Escanaba and Door County.
- Spacious, comfortable seating is configured to allow you to relax, socialize, read, eat, or work.
- The ferry could offer two round trip passages daily throughout the spring and summer, and one round trip daily in the fall.
- A high speed ferry is typically capable of holding 45 vehicles and 250 passengers for each passage.
- Car rental services are recommended at both terminals, as well as taxi and/or shuttle services to nearby hotels.
- Modern efficient terminals. The ferry will need newly built terminals in Escanaba and Door County, with ample parking and easy access at both locations.
- The Lake Express is typically in service from May 1 through December 31.
- For funding, the U.S. Department of Transportation, Maritime Administration approved Lake Express' Title XI Application for loan guarantees to support financing for its new vessel. Since the 1930s, the Maritime Administration has assisted shipbuilding in the United States through its Title XI loan guarantee program.
- High speed ferries are basically vehicle and passenger-carrying catamarans.
- The Muskegon ferry was build at a shipyard in Mobile, Alabama, by Austal USA. Austal USA is jointly owned by Austal Ships Pty, an Australian-based company that is the world's leading fast-ferry naval architect and shipbuilder and Bender Industries, a leading US shipyard.
- Lake Express, LLC was organized by Lubar & Co., a Milwaukee based investment firm. Government and tourism officials in both Michigan and Wisconsin both offered support for the new service.
- Austal, USA is manufacturing the Lake Express high-speed ferry at its facility in Mobile, Alabama. The Lake Express was the first high-speed vehicle/passenger vessel constructed to serve ports within the continental United States. The vessel is a modern catamaran built with marine grade aluminum alloy.
- Speed: A high speed ferry can maintain a speed of about 34 knots (about 40 miles per hour). There are four main diesel engines manufactured by MTU Detroit Diesel. Their 4000 series engines are designed for commercial vessel applications.

- Propulsion: It has four Rolls-Royce Kamewa water jets equipped with steering nozzles. This specialized propulsion system is found in many of the world's high-speed ferries.
- Motion Control: The Lake Express vessel will be equipped with a state-of-the-art motion control system. This computerized system continuously monitors any motion of the ship and adjusts the hydrodynamic control surfaces to provide a smooth ride.
- Safety: The ship will meet or exceed all appropriate U.S. Coast Guard regulations. The design includes fire detection and extinguishing systems. The vessel is fully equipped with adult and child life jackets and life rafts. The high-speed ferry also carries a rescue boat with an outboard motor.
- The ferry cost an estimated \$18 million as a total project and undertaking.
- The Lake Express service began on June 1 and shut down on Oct. 31 in its first year, attributed to slow bookings for November and December. But even after shortening its first season from seven months to five, the Lake Express still exceeded its 2004 ridership projections. Although the projections have not been released, officials reported that the ferry carried more than 100,000 passengers that first partial year.
- Since service started June 1, the Lake Express has canceled a higher-than-expected number of trips, mostly because of rough water on Lake Michigan. Through Sept. 8, the ferry canceled 11 of 295 round trips, nearly four times the projected 1% cancellation rate.
- Officials stated that rough seas and resulting cancellations are not a factor in the decision to end the first season early. Rather, inadequate marketing was set to blame, with statements travelers assume the service is available only in summer and fall. The ferry resumed service on April 30 for its first full year of 2005.
- Entrepreneurs, David Lubar and Oyvind Solvang, principals at Milwaukee venture capital firm Lubar & Co., had worked for more than two years to establish a Lake Michigan ferry connecting Milwaukee and Muskegon.
- Lubar and Solvang raised \$8.5 million for their Lake Express project and pursued a federal government loan guarantee from the U.S. Maritime Administration that would have enabled them to borrow an additional \$14.5 million. However, the federal loan guarantee faced opposition from a republican U.S. representative of Wisconsin.
- Battling to keep its hold on the newly competitive Lake Michigan ferry market, the parent company of the S.S. Badger (Manitowoc, Wisconsin to Ludington, Michigan) then invested more than \$100,000 in renovations to its 52-year-old vessel that runs at about 18 miles per hour.
- In its first partial year of 2004, passenger ridership for the S.S. Badger was down, attributed to the new Lake Express, bad weather and high gas prices that impacted travelers. The Badger and Lake Express don't release specific passenger figures, but both claim to carry more than 100,000 passengers a year.
- The slower S.S. Badger also stresses that it didn't miss any scheduled sailings during 2004, compared to the Lake Express, which cancelled 11 of 295 round trips through

Sept. 8 of last year, mainly because of rough seas. The Lake Express is now spending \$450,000 on new stabilizers to provide a smoother ride.

- Lake Express has also talking about adding a second boat. They believe the market's there.
- Neither the Lake Express nor the Badger discloses exact passenger figures, but each has said that it carries about 100,000 passengers a year.

8.4 Case Study #2: Menominee to Sturgeon Bay

The Sturgeon Bay to Menominee Ferry is a proposed service presented by Robert Ruleau, owner of a Menominee commercial fishing business. Here are some of the project attributes, as reported by local media and newspapers:

- Ruleau has reported plans to purchase two passenger-only vessels for the ferry line.
- Ruleau said he was investing about \$2 million in the ferry line and planned to hire six to 12 employees to run it.
- In addition to the vessels, Ruleau owns the Menominee dock that the ferries would use. He also owns the Ruleau Brothers Inc. fishery and is opening a restaurant, Catch of the Bay Fish and Chips, in nearby Marinette.
- Ferry service would run from mid-May to mid-October, with up to four round trips daily at the height of the tourist season and two daily round trips in slower periods.
- Adults would pay \$20 one way or \$35 for a round trip, with discounts for children, older adults and multiple-ride packages. The 16-mile trip across the bay would take about an hour.
- Ruleau reports to have purchased the Isle Royale Queen III, which was shuttling tourists between Isle Royale National Park and Copper Harbor, in Michigan's Upper Peninsula, until a newer vessel replaced it.
- The ferry can hold about 100 passengers, and may have already been delivered.
- The second vessel was already in service in Mobile, Alabama. Although it is much larger, it will probably be licensed for 149 passengers to avoid stringent federal security rules for ferries with 150 or more passengers.
- In Sturgeon Bay, the ferries would dock at the Stone Harbor resort's 800-foot pier, although that deal hasn't been negotiated yet.
- The City of Sturgeon Bay has not yet approved the proposal, but view the plan as a serious venture that could boost tourism. It is generally agreed that linking Door County to the Upper Peninsula would be a tourist boon for both areas, allowing easy day trips for what would otherwise be a 200-mile trip around the bay.
- Ruleau said he was not projecting a passenger total, but could break even with as few as 35,000 passengers a season.

8.5 Case Study #3: Algoma to Frankfort

The Algoma to Frankfort Ferry is proposed by a Michigan business executive, Brian McCaughrin, owner and president of McCaughrin Maritime Marine Systems, Inc., a freighter line in Wayne, Michigan. Here are some of the proposed project attributes, according to various media reports:

- McCaughrin said he could attract 175,000 to 200,000 passengers a year to his Algoma-to-Frankfort line without detracting from the SS Badger, which runs from Manitowoc to Ludington, or the Lake Express, from Milwaukee to Muskegon.
- McCaughrin said he could do better than 100,000 passengers a year because his line would be closer to the prime tourist areas of Door County and Mackinac Island in Michigan.
- Both cities might need to dredge harbors to accommodate ferries, which could require state or federal aid.
- Brian McCaughrin has conceded that his concept will take some time, and the Cities of Algoma and Frankfort have said they are cautious but hopeful about the plan. In particular, Frankfort would welcome the return of a ferry service, which it had but lost in 1982.

8.6 Case Study #5: Rochester to Ontario

On June 17th, 2004, the first new border crossing in about 50 years was opened between the United States and Canada. The new ferry crossing linked the Toronto, Ontario with Rochester, New York. The ferry had a very short life before becoming buried under mounds of red tape, quickly leading to cancellation. The project may still represent a good analog for other ferries, and perhaps Escanaba can learn some quick tips from a study of The Breeze's attributes:

- The ferry was officially named The Spirit of Ontario and more commonly known by its nickname, The Breeze. Previously, it had also been known as "The Cat."
- The four deck catamaran can reach speeds of almost 55 miles per hour and can carry 750 people, 220 cars and 10 trucks or tour buses.
- The Breeze was built by Austal Ships, in Perth, Australia.
- The Breeze is five stories tall, 284 feet long and 78 feet wide, and as big as a football field, weighs more than 1,400 tons, and is three times larger than the Lake Express. It is capable of carrying up to 470 tons.
- The interior design is more like a cruise ship than a ferry. Ridership packages were also available. For example, riders could choose a package with one night at a nearby hotel with transfer to and from the hotel. Riders could take a subway to Union Station, and then be dropped off in front of the departure terminal.
- The Breeze is a twin-hulled catamaran recently docked in Hawaii on a round-the-world voyage to its new home port in Rochester.
- The Rochester Mayor is credited with keeping The Breeze Ferry in Rochester, when it purchased the ferry for \$32 million. The ferry's total cost was about \$42 million.
- The nickname "The Breeze" came about with a "Name the Ferry" contest. It drew approximately 30,000 entries in two months. The winning prize was two free life-time passes.
- Instead of operating with a propeller, The Breeze uses a jet water propulsion system that sucks in water and shoots it out to move. The system can fill an Olympic-size pool in about 30 seconds, pumping an amazing 20,000 gallons per second at full thrust.
- Travel time for passengers was 2.25 hours.
- Interior features included a children's area, 2 movie theaters, electronic game room, 38 televisions, fully equipped business lounges, and restaurant.
- The Breeze Ferry has an elevator & a special seating area for wheelchairs.
- The Ferry made two or three round trip voyages daily, with year-round service. The lake never freezes over, and swells rarely rise higher than 10 feet.
- The road trip between the two cities usually takes three to four hours, and far longer during miles-long backups at the border near Niagara Falls.
- In Rochester, The Breeze Ferry Terminal is located on the Genesee River in Charlotte, approximately 1 mile from the Lake Ontario State Parkway and the connecting

national interstate highway system. It is about a 15-20 minute drive to downtown Rochester, N.Y.

- In Toronto, The Breeze Ferry Terminal is located at the end of Cherry Street off of Lakeshore Drive, approximately 1 mile from the Gardiner Expressway and a 1 1/4 mile taxi or shuttle ride to Yonge Street.
- It was estimated to take no longer than 20 to 25 minutes at each end on board The Breeze.
- On Tuesday, January 10, 2006, the City of Rochester made the difficult decision to discontinue ferry service. The ferry lost \$10 million in 10 months and that was deemed too great a financial risk to continue.
- The Breeze is now suspended indefinitely in Rochester after running for just 80 days. An accident caused a seven week start-up delay, and put Rochester's ferry in a financial hole before it even got running.
- Some claim that the Rochester Ferry was a victim of poor marketing. To succeed, it needed to have a high profile in Toronto. Instead it was allowed to accumulate staggering debt and die a slow death.
- The Toronto Port Authority had invested 12 million dollars from it's own budget to build the ferry terminal.

9.0 Supply-Demand Analysis

To determine the retail potential for Downtown Escanaba, we have conducted a rigorous supply - demand analysis of the trade area. In the following sections we will describe our approach to the supply - demand analysis, indicate the supply, define the demand, and present the opportunity for new retail in the downtown.

9.1 Methodology and Approach

The deductive supply - demand analysis assumes that there will be no over-storing in any given market. In other words, it is assumed that each new merchant will reasonably attempt to reach the limit of expenditure potential in each category, but will not exceed a threshold level of market saturation.

A market's saturation level within any given retail category is usually discovered by trial-and-error, as merchants can learn through experimentation if an increase in space or merchandise no longer results in an increase in sales. This process can be both discouraging and costly, but can be mitigated with an accurate supply-demand analysis. This type of opportunity analysis can enable effective retail planning, as existing stores, or new entrepreneurs can back-fill the retail voids, capturing a possible niche market in the area, maximizing sales and creating a sustainable shopping environment.

Up to a certain threshold, expenditures can be influenced by opportunity and competitive levels. If local residents have a capacity to spend, but choose not to because of limited retail selection or quality, they will seek competing destinations, resulting in sales export. If other options do not exist, they may simply curtail spending. This can indicate a considerable opportunity for additional retail space in the market.

Once a market reaches its threshold in retail space, the addition of more space will result in negative sales impact for existing merchants, and cannot be expected to motivate additional spending. Rather, the market share for each retail category is then expected to be redistributed after new stores open, with inevitable negative sales impact on existing units.

The “build it and they will come” principle applies only when local supply does not yet meet the market demand. However, resident expenditure potential does increase with gains in population, households and labor force, and particularly with increases in income levels. These fundamental rules, when applied in our retail analysis, are used to quantify the amount of additional space that is supportable in the downtown, which represents the retail core for the effective trade area.

9.2 Trade Area Delineation

As an essential step in our quantitative supply - demand analysis, we have delineated an Effective Trade Area based on a number of market factors and conditions. These include the locations of competing shopping destinations, distribution of population and income levels, physical and socio-economic barriers, transportation networks and corresponding drive-time distances.

We have generated a drive-time analysis for the downtown at 30, 60, and 90 minute intervals. While the results of this computer-generated analysis tend to be conservative in terms of distance traveled within a certain time frame, they are consistent and provide an accurate basis for delineating the trade area. Map 5 in the Appendix displays the drive time results.

Based on our review of the market, the downtown's full potential, highway linkages, and the drive time analysis, we have determined an Effective Trade Area. As displayed in Map 5, this area includes Gladstone to the north, Manistique to the east, and extends west and south to midway points between Escanaba and the competing markets of Iron Mountain and Menominee.

This trade area has been delineated with consideration of likely shopping patterns. For example, shoppers tend to gravitate toward urban centers that are either closer or provide greater shopping opportunities. For this reason, the trade area boundary lies roughly half way between Escanaba and neighboring urban centers, including Menominee, Iron Mountain, and Marquette. However the trade area has a wider range to the east, as there are few communities with comparable retail draw in that direction.

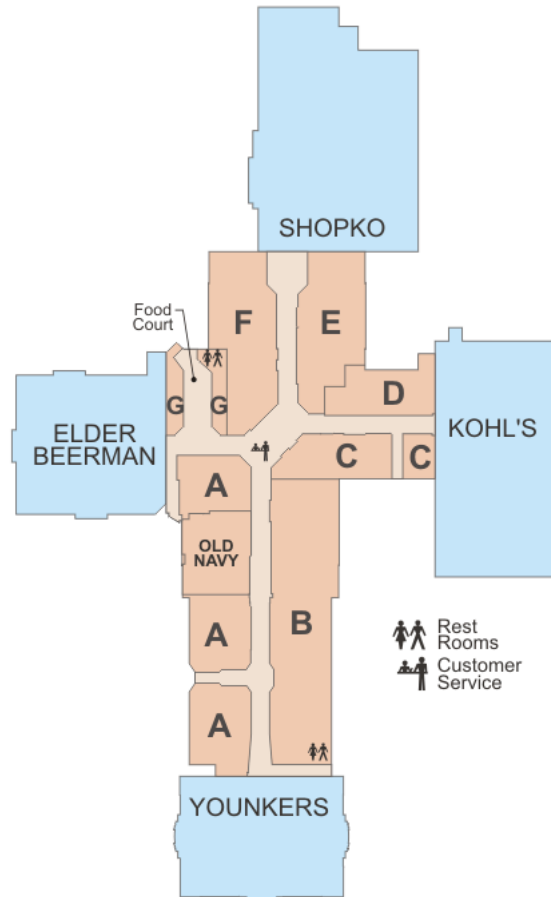
9.3 Supply - Regional Shopping Destinations

Shopping opportunities outside of the trade area attract residents with retail shops that may not be available locally. While some shoppers may head north to Marquette or west to Iron Mountain, a majority of residents that shop outside Escanaba travel to Green Bay and Appleton, Wisconsin. The larger population base of these cities enables more retail options and attracts shoppers from hours away for items they may not be able to find in their home market.

Regional shopping centers such as Bay Park Square Mall in Ashwaubenon (Green Bay) and Fox River Mall in Appleton offer retail choices that are not available in the Escanaba trade area. Stores like Elder Beerman, Macy's, Best Buy and Barnes & Noble

offer higher end merchandise, greater selection, or lower prices that attracts shoppers from a wide region. Figure 9 Displays the store layout of Bay Square Mall in Ashwabenon.

EXHIBIT 9. Store Diagram of Bay Park Square Mall in Ashwabenon



9.4 Supply - Trade Area

Escanaba provides a retail core within its mostly rural trade area. With the exception of retail clusters in Gladstone and Manistique, the majority of retail activity in the area is located in or near Escanaba.

While downtown Escanaba serves as the geographic and civic hub of the region, a large portion of the City’s retail activity is located to the west of the downtown along Lincoln Street near the Ludington Street intersection. This has been a consistent trend over the past few decades as new retailers enter the market and locate where they have the best access to highway traffic and where large tracts of land were available for development. Some of the retailers located in this corridor include:

TABLE 1. Lincoln Street Retail Corridor

Large Chain Retailers		
Wal-Mart	Staples	Super One Foods
Kmart	Menards	Elmer’s Country Market
Shopko	JC Penney	Sears

Retail continues to grow in this area, with expansion west along Ludington Street where large tracts of undeveloped land are available. While this expansion may appear to be a threat to retail downtown, it may actually help the downtown as the addition of large retailers expands Escanaba’s trade area and attracts more shoppers to the city. Downtown merchants must focus on providing the service, selection, and convenience that large retail chains often don’t provide.

We have created a matrix to compare the retail options available in Escanaba to the retail options in surrounding communities of roughly comparable size. As seen on the next page, this grid includes a select list of retailers found in Escanaba and neighboring communities, and indicates that retail in Escanaba is similar to other communities its size.

Big-Box / National Chain Retail Grid

	Escanaba	Iron Mountain	Marquette	Sault Ste. Marie	Marinette/ Menominee	Houghton	Rhineland	Green Bay	Appleton
Wal-Mart	Super Center	Super Center	Super Center	W	W	W	Super Center	Super Center	Super Center
Kmart	K	K	-	K	K	-	K	K	-
Shopko	S	S	S	-	S	S	S	S	S
Target	-	-	T	-	-	-	-	Greatland Target	T
Home Depot	-	H	-	H	-	-	H	H	H
Menards	M	-	M	-	M	-	M	M	M
Kohl's	-	-	K	-	-	-	-	K	K
Sam's Club	-	-	-	-	-	-	-	SC	SC
JC Penny	JC	JC	JC	JC	JC	JC	JC	JC	JC
Sears*	Sears Hometown	Sears Hometown	Sears Hometown	-	Sears Hometown	Sears Hometown	Sears Hometown	Department Store	Department Store
Younkers	-	-	Y	-	Y	-	-	Y	Y
Glik's	G	-	-	-	-	G	G	-	-
Dunham's Sports	D	D	D	D	D	D	-	D	-

Source: Retailer websites; collected and compiled by Anderson Economic Group, LLC

*Sears Hometown Dealers offer a limited selection of merchandise, typically home appliances and hardware items.

9.5 Supply - Downtown Escanaba

As part of our supply inventory, we have assembled lists of traditional retailers and services in Escanaba's downtown. These businesses can be found in the Appendix to this report. As shown in the list, the downtown currently has a mix of retail, services and eating establishments. This mix is important, as residents and visitors that come downtown for one particular store or service may be enticed to cross-shop and extend the duration of their stay.

9.6 Demand - Demographic Analysis

In order to determine the demand potential for Escanaba, we must understand the market demographics of the study area. To accomplish this, we have analyzed key socioeconomic variables for the County and measured those results against the competitive region and the State of Michigan. The complete results of this analysis are in the attached appendix.

Population and Growth

The population of Delta County has declined slightly and has trailed the State of Michigan since 1990. Between 1990 and 2000, Delta County grew at an annual rate of 0.2%, while the State grew at 0.7%. Between 2000 and 2005, Delta County declined at an annual rate of -0.2%, while the State grew at 0.7%. The population of Delta County is expected to continue unchanged, based on 2005 to 2010 projections.

Delta County had a lower growth rate than neighboring Schoolcraft and Alger Counties between 1990 and 2000, however Delta County had a higher growth rate than Marquette County during the same time period. The State of Michigan has outpaced the region from 1990 to 2005, and is forecast to continue this trend from 2005 to 2010.

Per Capita Income and Growth

Growth in Per Capita Income for Delta County outpaced the State and Menominee, Dickinson, and Marquette Counties from 1989 to 1999, at 5.6% compound annual growth rate (CAGR). However, growth in per capita income in Delta County between 1999 and 2005 dipped to 1.9%, trailing all neighboring Counties with the exception of Alger County.

Growth in Per Capita Income for the ETA has mirrored Delta County from 1989 through 2005, however the actual dollar amount remains lower for the ETA than for the County. In 2005, the per capita income for the Escanaba ETA was \$20,281 compared to \$20,928 for Delta County and \$25,633 for the State of Michigan.

Age Profiles

The median age of residents in Delta County was 40.4 in 2000, and is currently 42.2 (2005). This is an indicator of an aging population and possibly an increasing population size of active seniors, retirees, and empty nesters in the County. In comparison, the median age for the State of Michigan was 35.5 in 2000 and is now 36.8 years. Both Schoolcraft and Alger Counties have median ages older than Delta County, while Marquette County has the lowest in the region at 38.3.

Home Values

The average home values in Delta County have increased at rates exceeding the State averages and the majority of the counties in the region. From 2000 to 2005, Marinette County had the highest growth in the region at 5.9%, next to Delta County at 5.6%. Delta County also has the second highest average home value in 2005, at \$122,517, next to Alger County at \$123,193. The 2005 to 2010 forecast for Delta County shows that growth in home values is expected to continue increasing, albeit at a reduced rate (4.7%).

Housing and Vehicle Ownership

As of 2005, the majority of the housing units in Delta County were owner-occupied, single-family detached. The housing vacancy rate in Delta County has decreased over the years going from 18.9% in 1990 to 16.5% in 2005. The vacancy rate is relatively low when compared to other counties in the region such as Schoolcraft (39.3%), Alger (37.5%), and Marinette (39.4%).

On average, households in Delta County have about 2 vehicles (1.8), and nearly 94% of households owned at least 1 vehicle. In Marinette County, 20% of all households had at least 3 or more vehicles, which is the highest share in the region. Inversely, Marquette County had the highest share of households with 0 vehicles at 8.2%.

Educational Attainment

Delta County has a relatively high share of residents with a 4-year degree or more (17.1%) in the region, second only to Marquette County (23.7%). More than half (50.3%) of the residents have at least some college experience. In comparison, 52.8% of State of Michigan residents achieved some college experience, and 21.8% achieved a 4-year degree or more.

9.7 Demand - Lifestyle Clusters

We have utilized a data set provided by ESRI Inc. to better evaluate the demographic makeup of the citizens of Escanaba and the surrounding region. Lifestyle Clusters take into account multiple socioeconomic and demographic variables to determine the “lifestyle” characteristics of a region. Exhibit X in the Appendix illustrates the top 10 lifestyle clusters for Delta County however, we have narrowed the focus and detailed the top 5 clusters with the descriptions for each below.

Salt of the Earth

Blue collar, rural or small town best describe the Salt of the Earth. Hard working, primarily in agriculture, manufacturing or mining, the labor force is slightly older with low unemployment. Household income parallels the U.S. median, \$48,300. Mostly married couples, these households own their homes. The median age is 39.5 years.

Rural Resort Dwellers

Rural Resort Dwellers follow the scenic route. Favoring milder climates and pastoral settings, the population resides in rural nonfarm areas throughout the U.S. Their communities are small, but growing—primarily single-family or mobile homes, including a significant inventory of seasonal housing. The population is older, with a median age of 46.2 years, and most are married with no children at home. Although retirement officially looms for many, most are employed. Many are self-employed.

Heartland Communities

Heartland Communities are preferred by 6.5 million people. The towns are small, located throughout the Midwest and the South. Over 75 percent of the homes are single-family dwellings with median home value of \$65,700. The population and the homes are older, most built before 1960. The median age of the population is 40.9 years; the median age of the homes, 45 years.

Rustbelt Retirees

As the name implies, most of these households reside in the Northeast or Midwest, especially in Pennsylvania and areas around the Great Lakes. Although many householders are still working, labor force participation is low. Over 40 percent of the households draw retirement income. The neighborhoods are typical of the older, industrial cities—owner-occupied, single-family homes in the city with a current market value of \$104,600. Unlike many retirees, those in the Rustbelt are not inclined to move.

Green Acres

A little bit country, the residents of Green Acres enjoy select homes in a pastoral setting. This upscale market represents developing fringe areas, with more in the Midwest. Most of the families are blue collar Baby Boomers, many with children aged 6-17 years. Median household income, \$60,000, and median home value, \$163,000, are high compared to the U.S.

9.8 Demand - Expenditure Potential

The demand evaluation of our retail analysis involves a comparison of resident income levels to those of the region, with the portion of income that is actually spent on each retail category in the trade area (*transacted* expenditures) compared to the portion of income that is more typically spent on each retail category within the region or State (resident expenditure *potential*).

Our demand analysis reflects the propensity of resident shoppers to spend in over 50 retail categories, and is a direct reflection of their income, the state and market that they live in, household composition and lifestyle characteristics. To determine the resident expenditure potential by retail category, we evaluated actual expenditures per capita within Delta County and the State of Michigan.

EXHIBIT 10. This table displays a small sample of the retail categories used in our retail analysis.

2002 Census of Retail Trade		Delta County		Michigan		Marquette County		Dickinson County		Menominee County	
naics	Description	Sales per Establishment	Share of PCI	Sales per Establishment	Share of PCI	Sales per Establishment	Share of PCI	Sales per Establishment	Share of PCI	Sales per Establishment	Share of PCI
441	Motor Vehicle and Parts Dealers	\$3,268,519	11.63%	\$7,504,700	13.2%	\$3,138,091	11.0%	--	--	\$1,391,750	6.1%
4413	Automotive Parts, Accessories, and Tire Stores	\$1,123,923	1.93%	\$1,096,845	0.9%	\$1,140,316	1.7%	\$1,093,200	2.0%	--	--
442	Furniture and Home Furnishings Stores	\$1,316,750	1.39%	\$1,559,061	1.3%	\$1,057,071	1.2%	\$534,300	1.0%	--	--
4421	Furniture Stores	\$1,977,333	0.78%	\$2,194,067	0.7%	\$1,052,000	0.7%	--	--	--	--
4422	Home Furnishings Stores	\$920,400	0.61%	\$1,122,121	0.5%	\$1,063,833	0.5%	--	--	--	--
443	Electronics and Appliance Stores	\$494,750	0.52%	\$1,824,104	1.2%	\$1,670,400	1.3%	\$557,111	0.9%	\$219,667	0.1%
444	Building Material, Garden Equipment and Supplies	\$1,912,815	6.81%	\$2,756,592	3.9%	\$2,157,600	5.1%	--	--	\$938,625	1.6%
4441	Building Material and Supplies Dealers	\$2,077,619	5.75%	\$3,095,692	3.5%	\$2,524,400	5.0%	--	--	--	--
4442	Lawn and Garden Equipment and Supplies Stores	\$1,336,000	1.06%	\$1,473,228	0.4%	--	--	--	--	--	--
445	Food and Beverage Stores	\$2,264,656	9.55%	\$2,202,649	5.5%	\$2,275,676	6.7%	\$2,721,714	7.1%	\$2,962,900	6.5%
4451	Grocery Stores	\$2,652,484	8.04%	\$2,939,581	4.9%	\$2,652,484	6.5%	--	--	--	--
4452	Specialty Food Stores	\$648,219	0.60%	\$648,219	0.2%	--	--	--	--	--	--
4453	Beer, Wine, and Liquor Stores	\$749,143	0.01%	\$749,143	0.4%	--	--	--	--	--	--
446	Health and Personal Care Stores	\$1,327,250	2.10%	\$2,314,379	2.8%	\$1,936,059	2.6%	--	--	--	--
448	Clothing and Clothing Accessories Stores	\$667,667	2.11%	\$1,026,231	2.0%	\$702,483	1.6%	\$557,313	1.7%	\$271,667	0.2%
4481	Clothing Stores	\$857,733	1.70%	\$1,205,062	1.4%	\$867,722	1.2%	--	--	--	--
4482	Shoe Stores	\$733,370	0.01%	\$733,370	0.3%	--	--	--	--	--	--
4483	Jewelry, Luggage, and Leather Goods Stores	\$791,401	0.01%	\$791,401	0.3%	--	--	--	--	--	--
451	Sporting Goods, Hobby, Book, and Music Stores	\$602,615	1.03%	\$1,213,299	1.1%	\$723,542	1.4%	\$425,750	1.0%	--	--
452	General Merchandise Stores	\$11,803,500	9.33%	--	--	\$10,556,310	10.9%	\$14,315,800	13.4%	\$3,621,200	4.0%
453	Miscellaneous Store Retailers	\$676,318	1.96%	--	--	\$357,390	1.2%	--	--	--	--
4532	Office Supplies, Stationery, and Gift Stores	\$2,278,911	1.20%	\$2,278,911	0.3%	--	--	--	--	--	--
71	Arts, Entertainment, and Recreation	\$400,350	1.06%	\$1,347,919	2.0%	\$363,286	0.8%	--	--	--	--
72	Accommodation and Food Services	\$469,500	7.80%	\$641,808	5.1%	\$483,556	6.5%	\$330,917	5.2%	\$313,140	3.4%
721	Accommodation	\$369,800	0.97%	\$1,033,828	0.8%	\$641,552	1.5%	\$316,125	0.9%	--	--
722	Food Services and Drinking Places	\$488,311	6.82%	\$599,550	4.3%	\$450,829	5.0%	\$334,397	4.2%	--	--
8121	Personal Care Services	\$106,455	0.15%	\$200,608	0.3%	\$106,455	0.3%	--	--	--	--
8123	Drycleaning and Laundry Services	\$246,000	0.16%	\$500,702	0.3%	--	--	--	--	--	--

Note: Numbers in sub-categories will not total the parent category due to missing categories.

By calculating the portion of local expenditures being captured by existing retailers, it can be determined which categories have remaining sales potential. A comparison of these results to supply by retail category would enable us to identify opportunities for additional shops, merchants or businesses. The analysis includes the following variables:

Estab.= Number of establishments within that retail category

Sales (\$000)= Total sales in thousands for each retail category

\$/Cap. (\$)= Sales per capita, or total sales divided by total population

% of PCI (%)= Sales per capita as a share of per capita income

We also qualify the opportunity for a variety of other unique market considerations, including site and locational characteristics, local economics, and significant retail events. We have considered strategic analysis concepts like clustering, critical mass, synergy, connectivity, merchandise mix, import / export, sales transfer, and impact or ‘cannibalization.’

10.0 Escanaba Shopper Survey Responses

A survey of shoppers in downtown Escanaba was conducted in September 2006, with 272 potential shoppers responding to the survey. This survey was conducted in a variety of formats, including phone surveys, shopper intercept surveys, and surveys completed by downtown workers and mailed back to us.

We conducted shopper intercept surveys in various locations throughout Escanaba on September 27 - 30, 2006. To fulfill the request from the DDA that at least 25% of the responses come from students, we targeted areas that we thought would have a high percentage of students, including Bay College, select retailers such as The Record Rack, and the Escanaba Eskymos high school football game on Friday night. Other survey locations included:

- Delta Plaza Mall
- 8th Street Coffee House
- Rosie's Diner
- Harbor Tower
- Escanaba Civic Center
- Downtown Gladstone
- Escanaba Library

EXHIBIT 11. This location on Ludington Street was a valuable location for surveying young shoppers



Overall, the results from the survey were positive with over half of respondents indicating that they visit downtown Escanaba more than twice a week. Other highlights of the survey include:

- Nearly half of respondents from Escanaba visit the downtown 5 times a week
- The most common reasons for visiting downtown are shopping and dining
- Over a third of respondents spent between \$20 and \$50 during their last trip downtown
- Nearly three-quarters of respondents drove to get downtown, and over half of them parked along Ludington Street
- Over 90% of those who drove had no problem finding a parking spot
- Existing Businesses and the Waterfront were identified as the two top attributes of the downtown
- Lack of businesses, inconvenient store hours, and traffic were identified as the the greatest dislikes of the downtown
- Additional clothing and sporting goods stores were identified as the types of retail stores respondents would most like to see downtown
- Over half of the respondents lived in the 49829 (Escanaba) ZIP Code
- 25% of the respondents were ages 13 - 17. Youth were especially targeted in this survey per the request of the DDA board
- The age and gender of respondents was well balanced in relation to other shopper surveys, which typically indicate that 80% of shoppers are female.

The complete results of this survey can be found on the following pages.

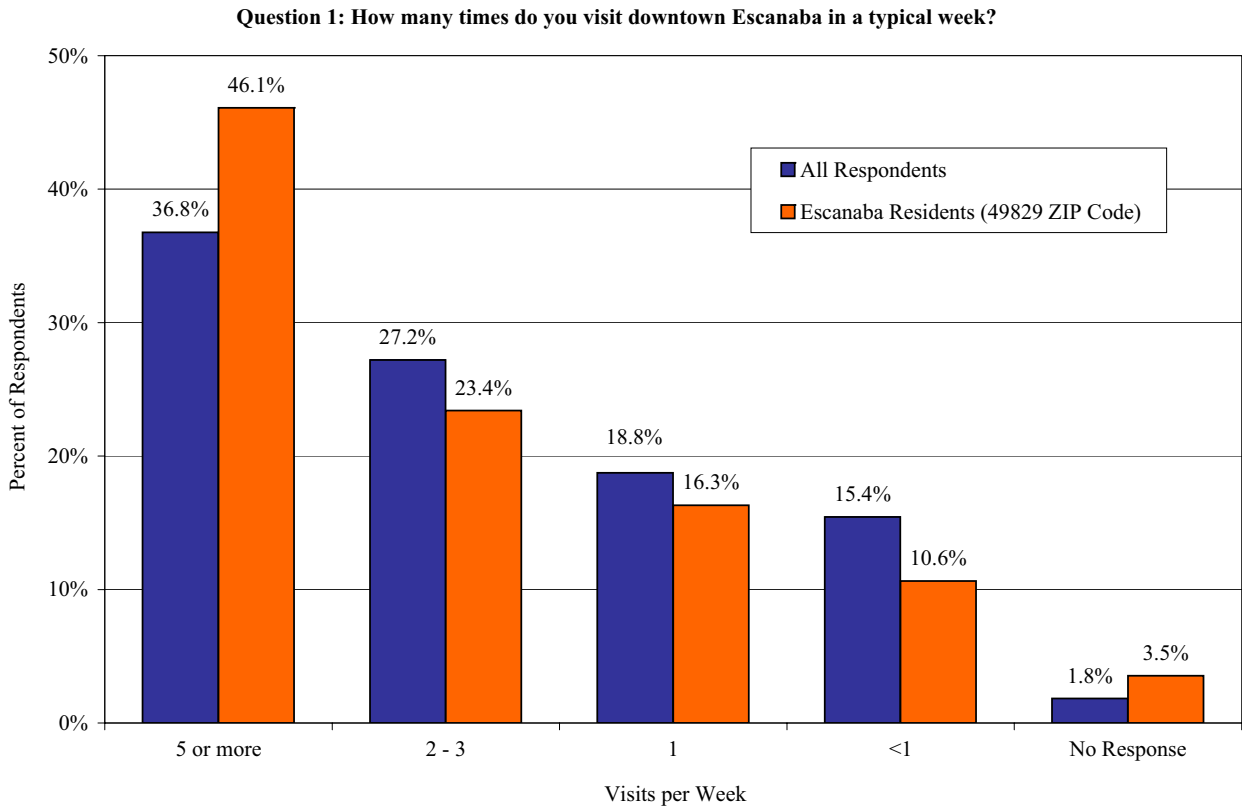
EXHIBIT 12. The Escanaba Eskymo football team prepares for their battle with Menominee as fans complete surveys to receive a \$2 voucher for the concession stand



1. How many times do you visit downtown Escanaba in a typical Week?

Visits per Week	Number	Percent
5 or more times a week	100	36.8%
2 -3 times a week	74	27.2%
Once a week	51	18.8%
Less than once a week	42	15.4%

Source: Anderson Economic Group Shopper Survey, September 2006



Source: Anderson Economic Group Shopper Survey, September 2006

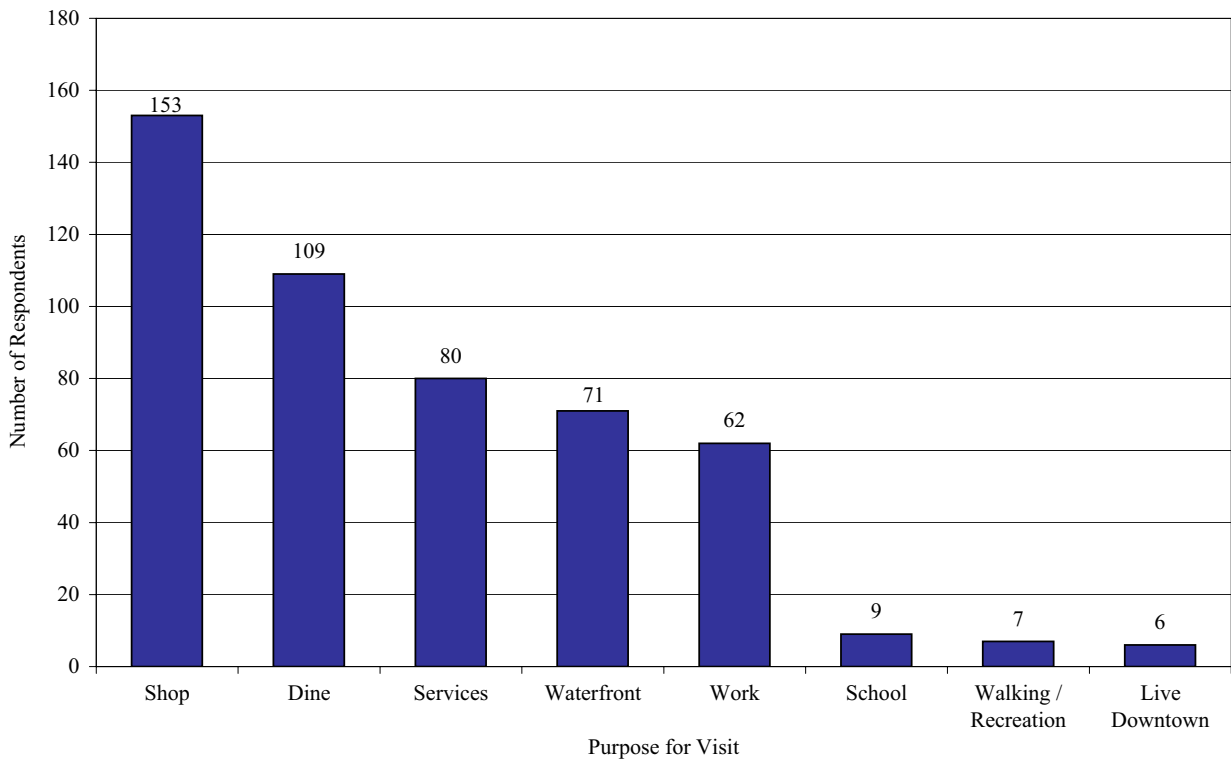
1. What is the purpose of your visit to downtown Escanaba? (select all that apply)

Purpose of Visit	Number	Percent
Shop	153	56.3%
Dine	109	40.1%
Services	80	29.4%
Waterfront	71	26.1%
Work Downtown	62	22.8%
School	9	3.3%
Walking / Recreation	7	2.6%
Live Downtown	6	2.2%
Library	2	0.7%
Other	35	12.9%

Source: Anderson Economic Group Shopper Survey, September 2006

Note: Results will add up to more than 100% due to multiple responses

Question 2: What is the purpose of your visit to downtown Escanaba?



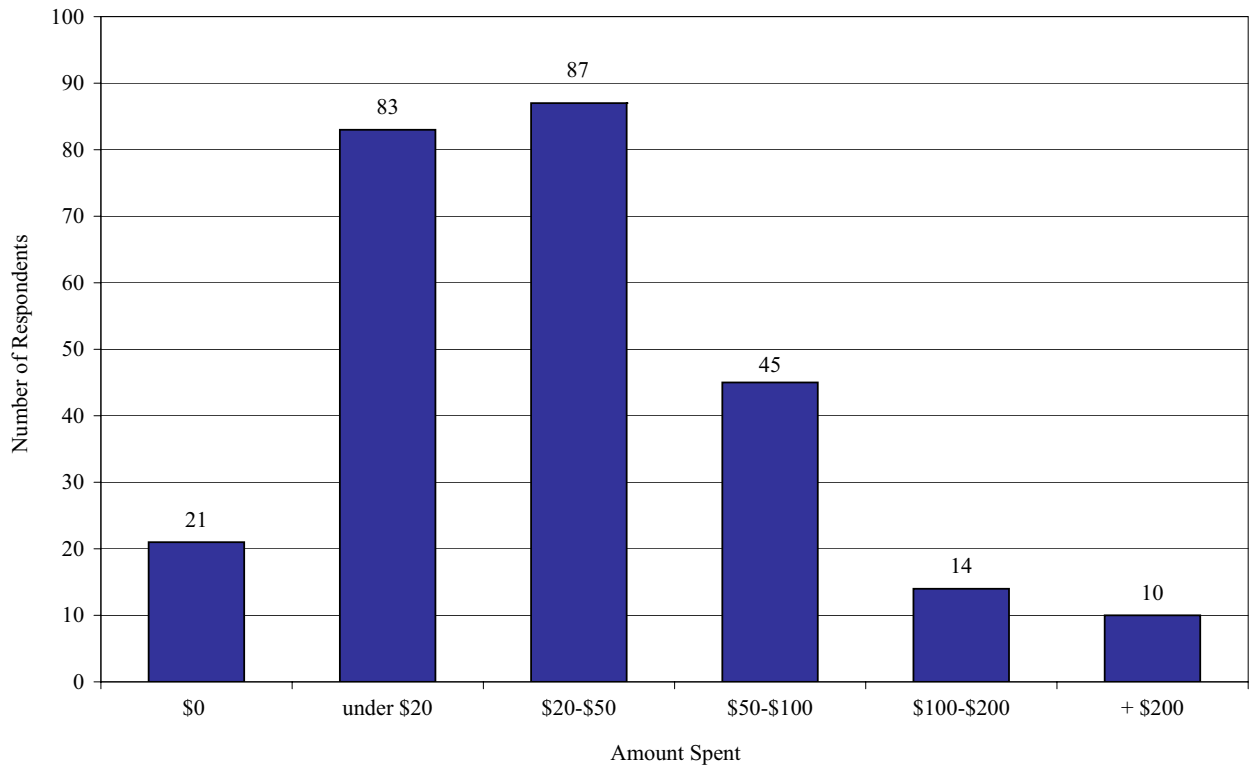
Source: Anderson Economic Group Shopper Survey, September 2006

2. Approximately how much did you spend the last time you shopped in downtown Escanaba?

Amount Spent	Number	Percent
Nothing	21	7.7%
Under \$20	83	30.5%
\$20 - \$50	87	32.0%
\$50 - \$100	45	16.5%
\$100 - \$200	14	5.1%
More than \$200	10	3.7%
No Response	12	4.4%

Source: Anderson Economic Group Shopper Survey, September 2006

Question 3: Approximately how much did you spend the last time you shopped in downtown Escanaba?



Source: Anderson Economic Group Shopper Survey, September 2006

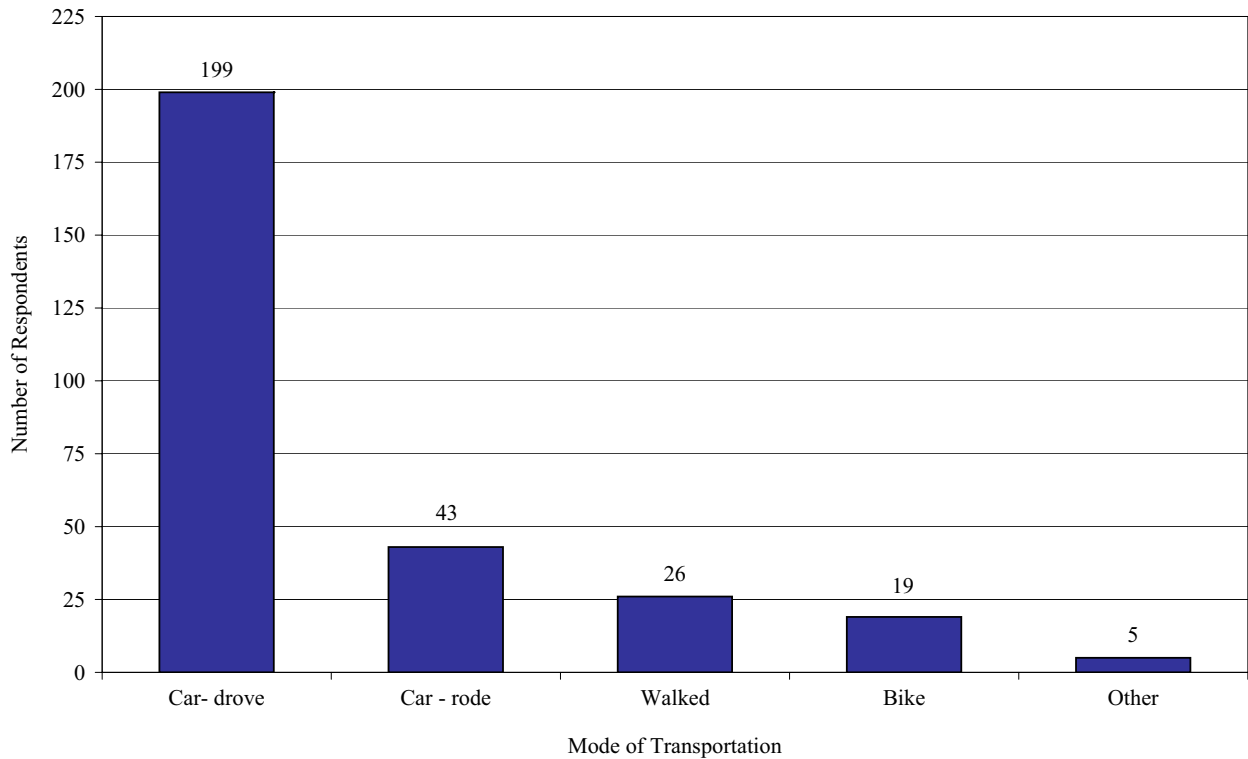
3. What mode of transportation did you use to get downtown?

Mode of Transportation	Number	Percent
Car - Drove	199	73.2%
Car - Rode with Someone Else	43	15.8%
Walked	26	9.6%
Rode a Bike	19	7.0%
Other	5	1.8%

Source: Anderson Economic Group Shopper Survey, September 2006

Note: Results will add up to more than 100% due to multiple responses

Question 4: What mode of transportation did you use to get downtown?



Source: Anderson Economic Group Shopper Survey, September 2006

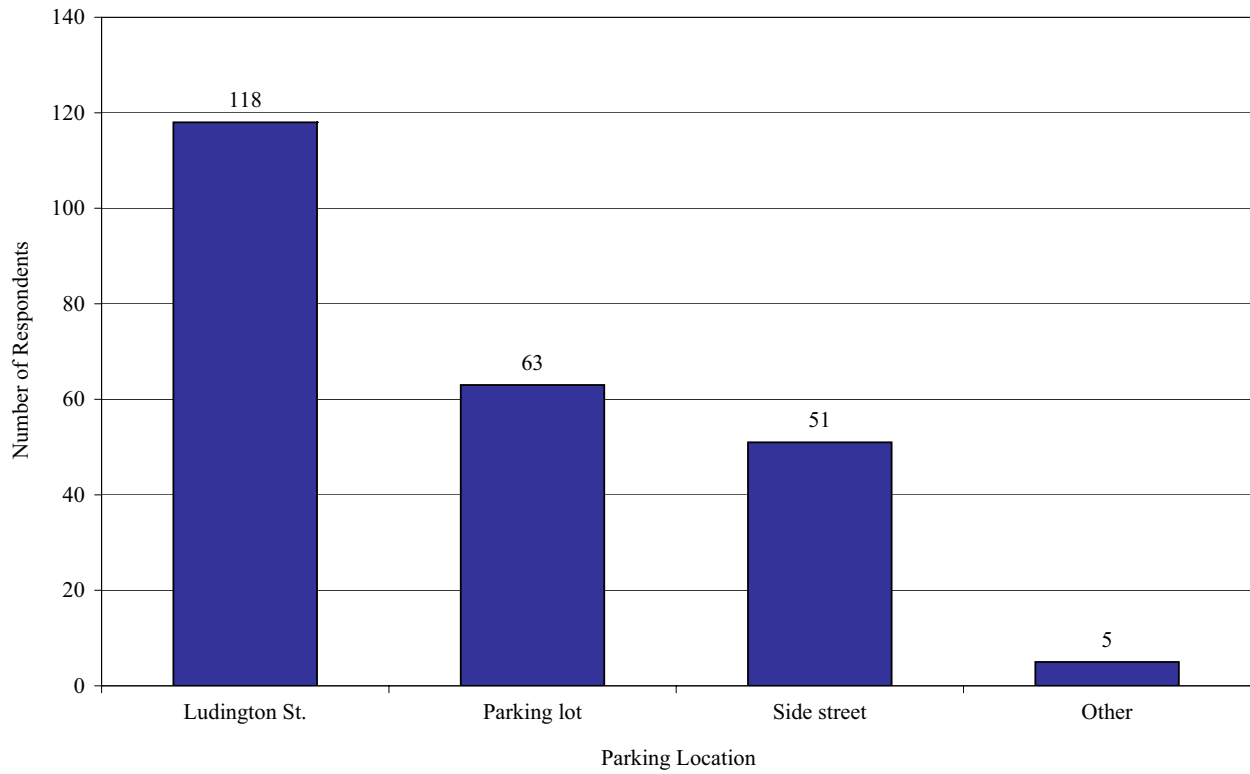
4. a. If you drove, where did you park your car?

Where Parked	Number	Percent
Ludington Street	118	51.1%
Parking Lot	63	27.3%
Side Street	51	22.1%
Other	5	2.2%

Source: Anderson Economic Group Shopper Survey, September 2006

Note: Results will add up to more than 100% due to multiple responses

Question 5a: If you drove, where did you park your car?

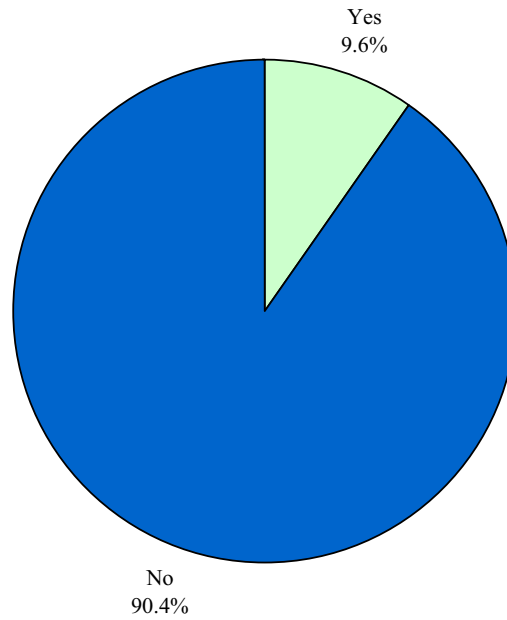


Source: Anderson Economic Group Shopper Survey, September 2006

b. Did you have a problem finding a parking spot?

	Number	Percent
Yes	10	9.6%
No	94	90.4%
<i>Source: Anderson Economic Group Shopper Survey, September 2006</i>		

Question 5b: Did you have a problem finding a parking space?



Source: Anderson Economic Group Shopper Survey, September 2006

5. What do you consider to be the best attributes of downtown Escanaba?

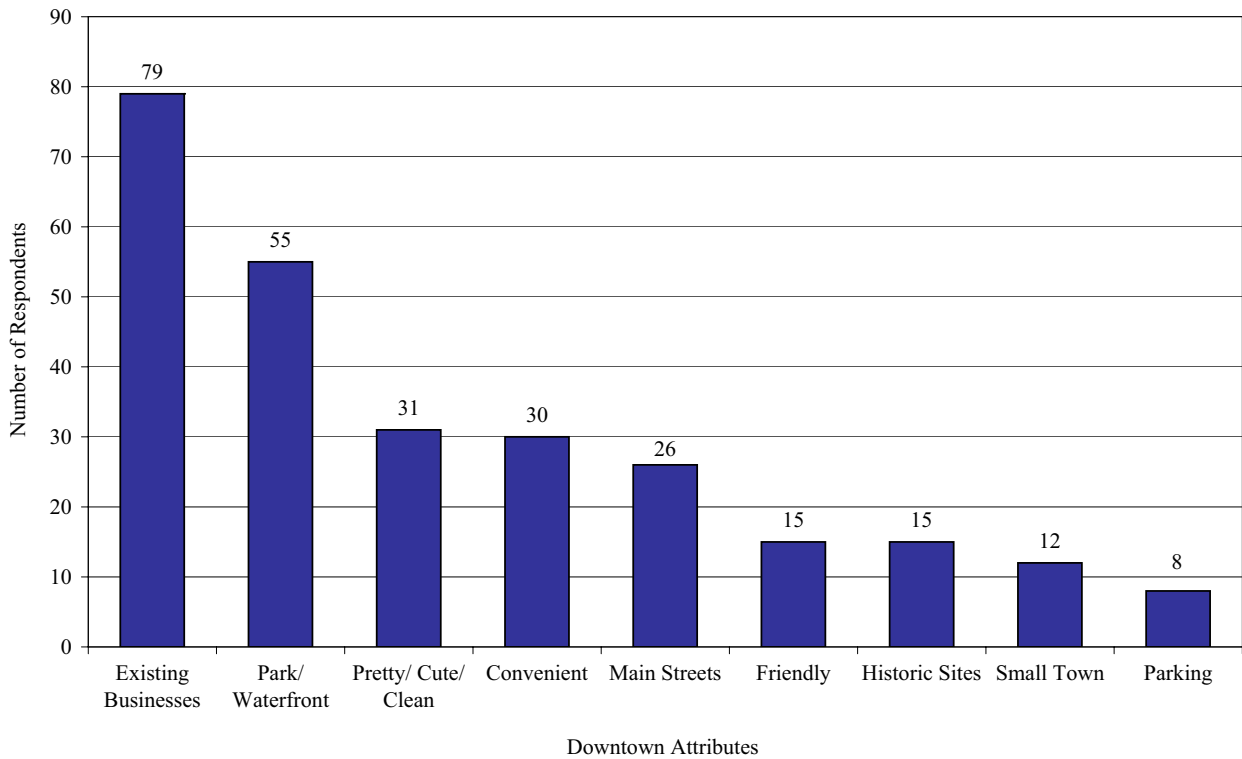
Best Attributes	Number	Percent
Existing Businesses	79	29.0%
Park / Waterfront	55	20.2%
Pretty / Cute / Clean	31	11.4%
Convenient	30	11.0%
Main Street	26	9.6%
Friendly	15	5.5%
Historic Sites	15	5.5%
Small Town	12	4.4%
Parking	8	2.9%
Other	48	17.6%

Source: Anderson Economic Group Shopper Survey, September 2006

Note: Results will add up to more than 100% due to multiple responses

“Other” Responses Include: Football games (5), The School (3), Not Crowded (2), Downtown (2), Potential (2), Variety (2), Renovations (2), Ludington Center (2). Some businesses received specific mention: Record Rack, The Delft, The Mall, 8th Street Coffee House, The Spec Shop. The following received 1 response: Everything, Safety, Bars, Store Fronts, Quiet, Fireworks, Library, Walkways, and the secluded setting.

Question 6: What do you consider to be the best attributes of downtown Escanaba?



Source: Anderson Economic Group Shopper Survey, September 2006

6. What do you dislike about Downtown Escanaba?

Dislikes	Number	Percent
Lack of Businesses / Bad Hours	50	18.4%
Traffic / Street Layout	43	15.8%
Parks / Roads / City are run down	36	13.2%
Closed Stores	34	12.5%
Nothing	32	11.8%
Not Much to Do	22	8.1%
Over-Crowded	6	2.2%
City too Spread Out	5	1.8%
Too Much Loitering	4	1.5%
The Police	4	1.5%
Other	29	10.7%

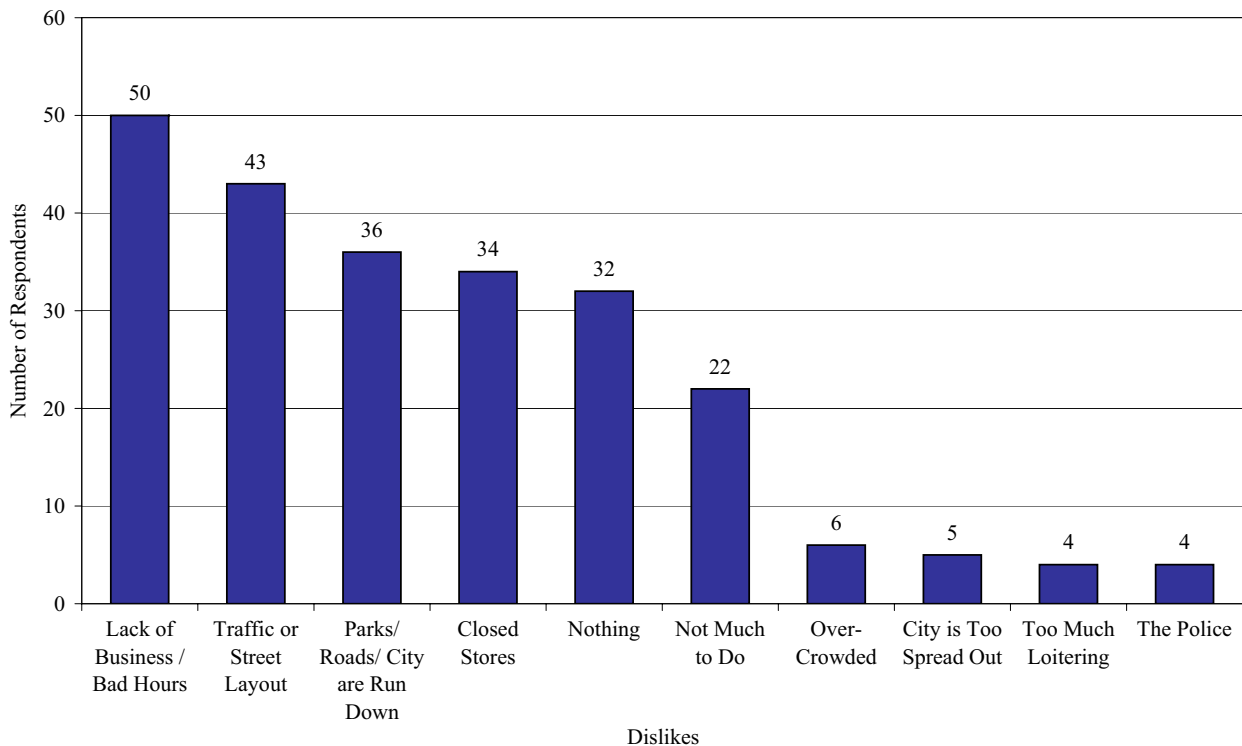
Source: Anderson Economic Group Shopper Survey, September 2006

Note: Results will add up to more than 100% due to multiple responses

Note: dislikes and suggestions for businesses were two different categories. There were many business suggestions, but they were not added as dislikes unless explicitly stated as such.

“Other” Responses include: Rude people (3), Too Small (2), Lack of Green Space (2), Inconvenient (2), Miss Old Downtown (2). The following items received one response: Expensive gas, Football team, narrow lanes, lack of good restaurants, out of the way, high prices, lacks uniqueness, Stores and parking are not big enough, no department store, no businesses by waterfront, Apartments downtown take all parking spots, location of city hall, not enough benches, too old, no jobs, city council.

Question 7: What do you dislike about downtown Escanaba?



7. What types of retail or shops do you think are missing from the downtown?

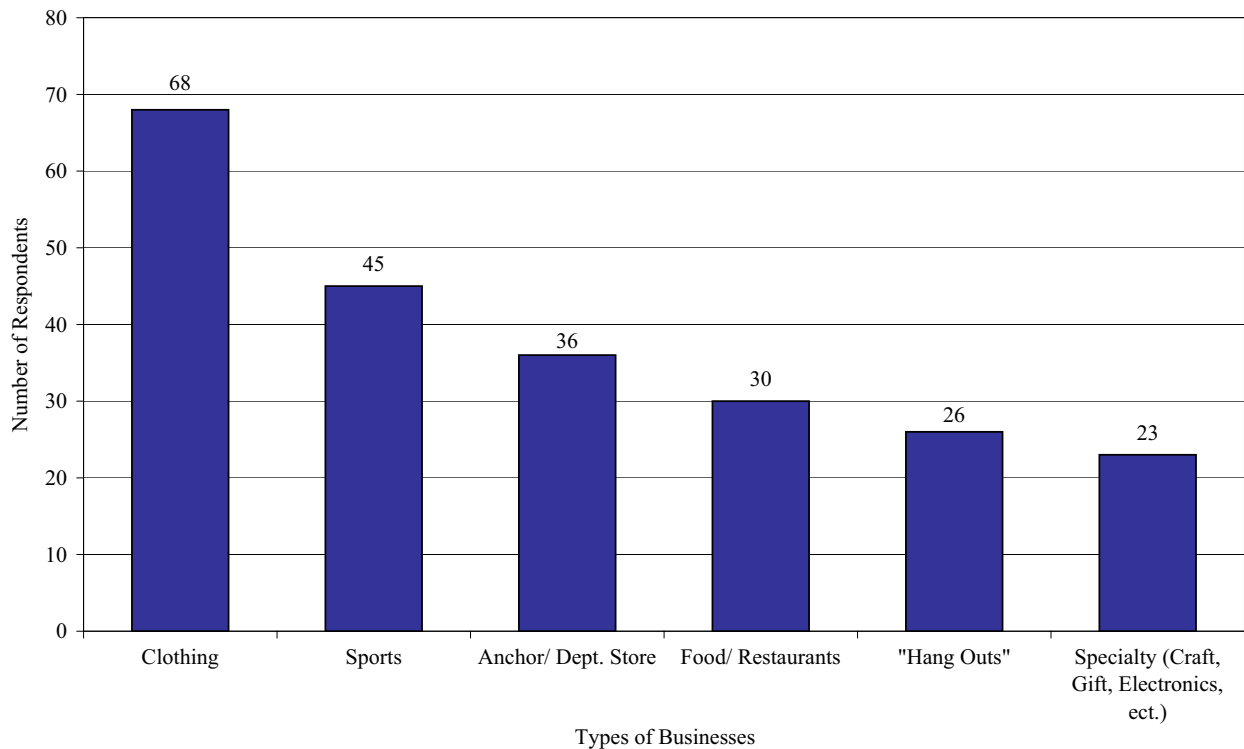
Types of Businesses	Number	Percent
Clothing	68	25.0%
Sports	45	16.5%
Anchor / Department Store	36	13.2%
Food / Restaurants	30	11.0%
“Hang Outs”	26	9.6%
Shoes	23	8.5%
Specialty (craft, gift, electronics)	23	8.5%
Other	49	18.0%

Source: Anderson Economic Group Shopper Survey, September 2006

Note: Results will add up to more than 100% due to multiple responses

Other Responses Include: Discount/Dollar/Dime stores (4), Mall (4), General Retail (3), Nice offices (2), Music Store (2), Strip Malls (2), Liquor store (2), Boutiques (2), Bakery (2), House and Hardware (2), Moped Store (2), Ice Cream Shops (2). The following received 1 response: Historic Shops, the Fair Store, Stores to compete with chains, tourist attractions, furniture, Christmas Trees, Convenient stores, Off-roading, Doughnut stores, candy store, stores from Green Bay’s mall, office supply, more stores in mall, used books, antiques, U.P. products store, photos, large bookstore, family owned businesses.

Question 8: What types of retail or shops do you think are missing from the downtown?



Source: Anderson Economic Group Shopper Survey, September 2006

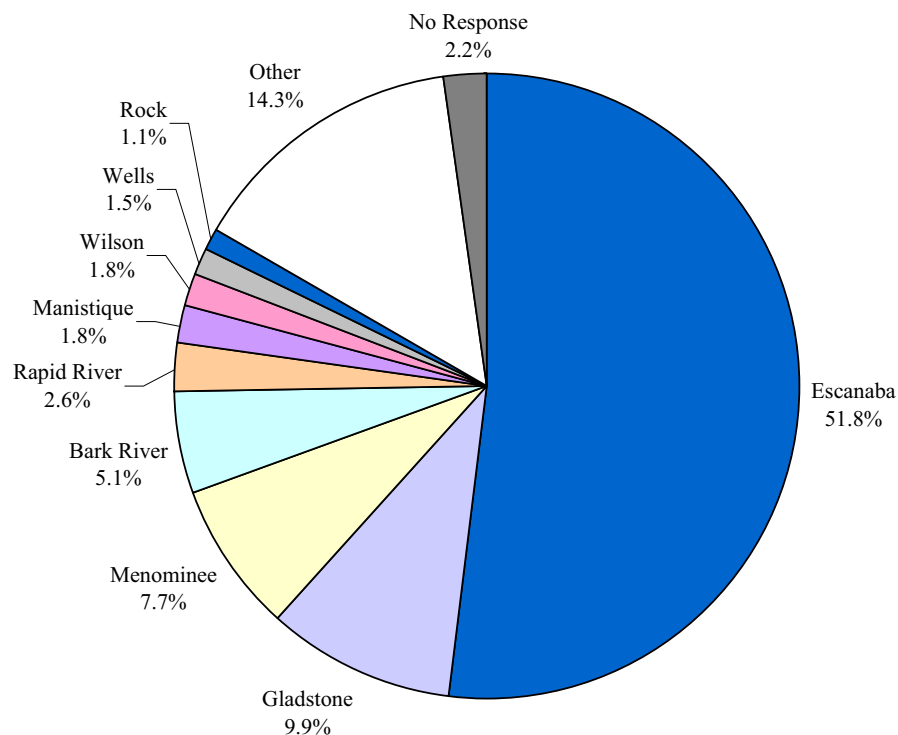
8. What is your home Zip Code?

ZIP Code	Number	Percent
Escanaba - 49829	141	51.8%
Gladstone - 49837	27	9.9%
Menominee - 49858	21	7.7%
Bark River - 49807	14	5.1%
Rapid River - 49878	7	2.6%
Manistique - 49854	5	1.8%
Wilson - 49896	5	1.8%
Wells - 49894	4	1.5%
Rock - 49880	3	1.1%
Other	39	14.3%
No Response	6	2.2%

Source: Anderson Economic Group Shopper Survey, September 2006

Note: Many of the respondents from Menominee were surveyed during the Escanaba high school football game, where Menominee high school was the visiting team.

Question 9: What is your home ZIP Code?



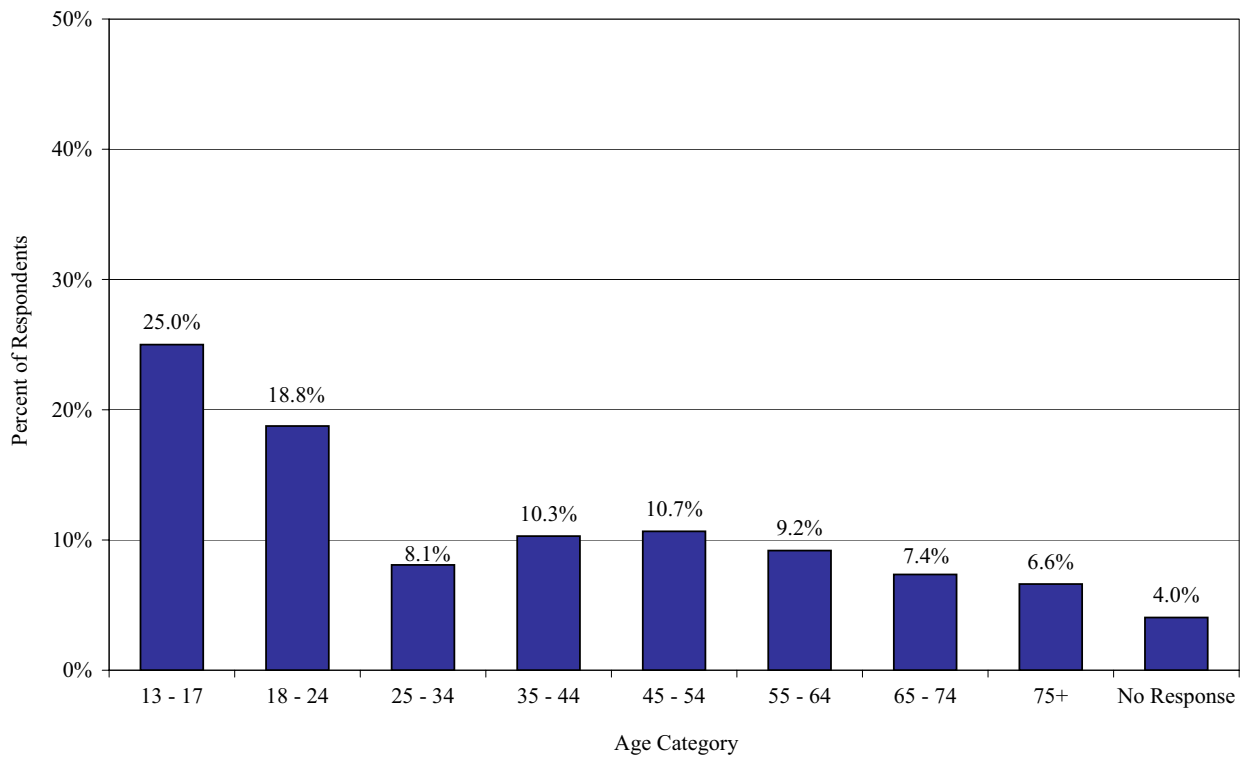
Source: Anderson Economic Group Shopper Survey, September 2006

9. Ages of Respondents

Age Category	Number	Percent
13 - 17	68	25.0%
18 - 24	51	18.8%
25 - 34	22	8.1%
35 - 44	28	10.3%
45 - 54	29	10.7%
55 - 64	25	9.2%
65 - 74	20	7.4%
75 and Above	18	6.6%
No Response	11	4.0%

Source: Anderson Economic Group Shopper Survey, September 2006

Question 10: Ages of respondents



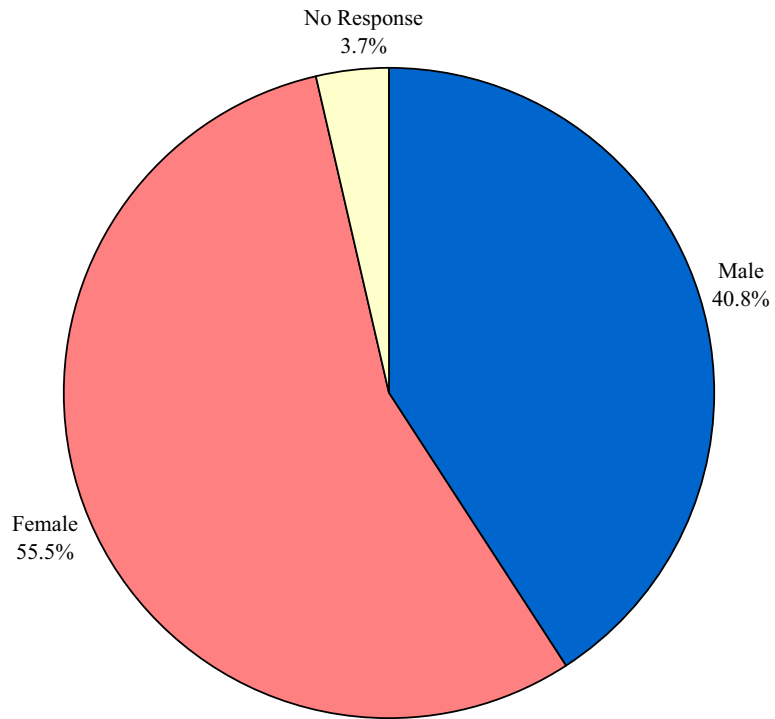
Source: Anderson Economic Group Shopper Survey, September 2006

10. Gender of Respondents

Gender	Number	Percent
Female	151	55.5%
Male	111	40.8%
No Response	10	3.7%

Source: Anderson Economic Group Shopper Survey, September 2006

Question 11: Gender of respondents



Source: Anderson Economic Group Shopper Survey, September 2006

Downtown Market Strategy APPENDIX

Prepared for:
The City of Escanaba, MI

Final Report

February 1, 2006

Prepared by:

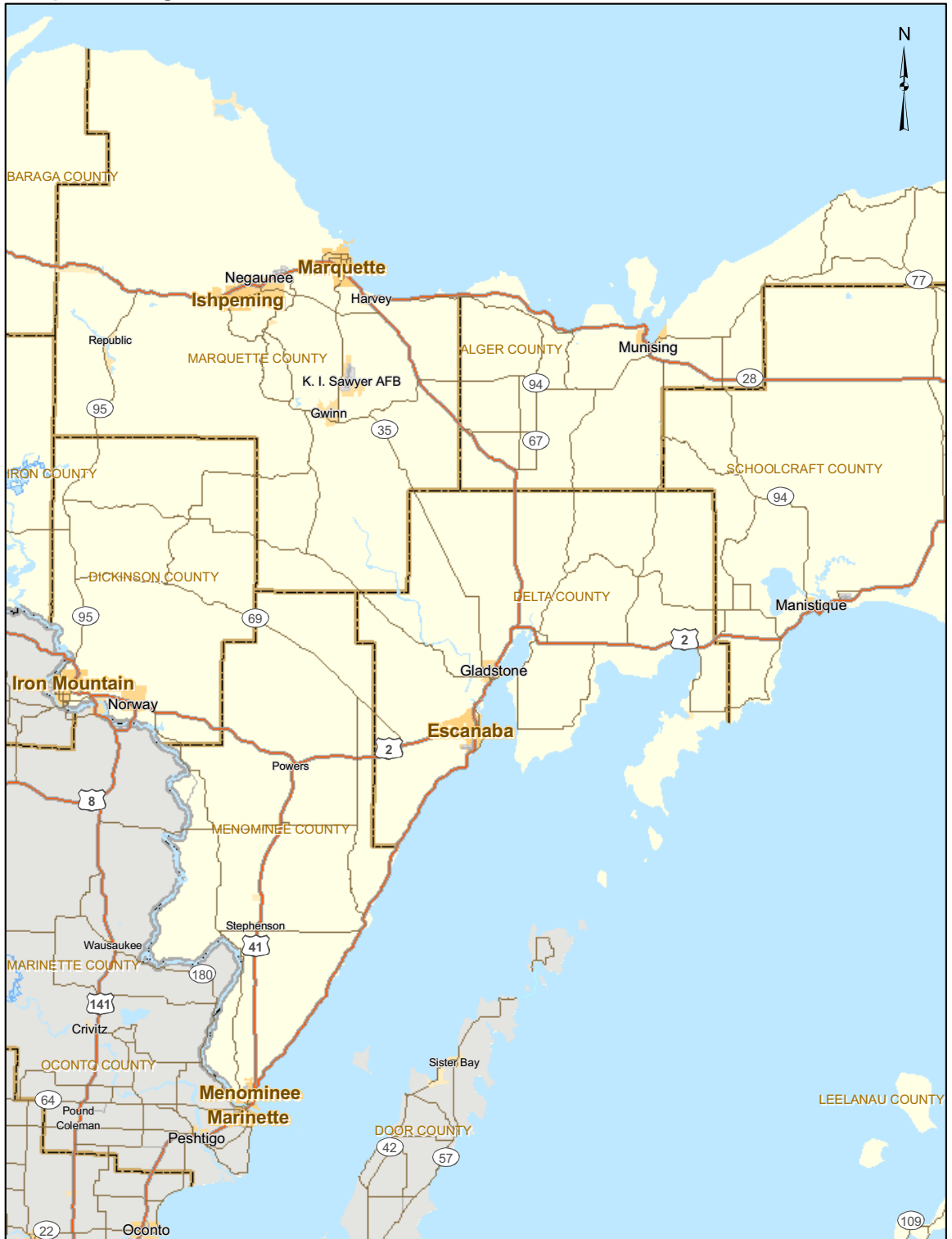
Sharon M. Vokes
Principal

Cameron L. Van Wyngarden
Senior Analyst



A. Maps and Demographic Tables

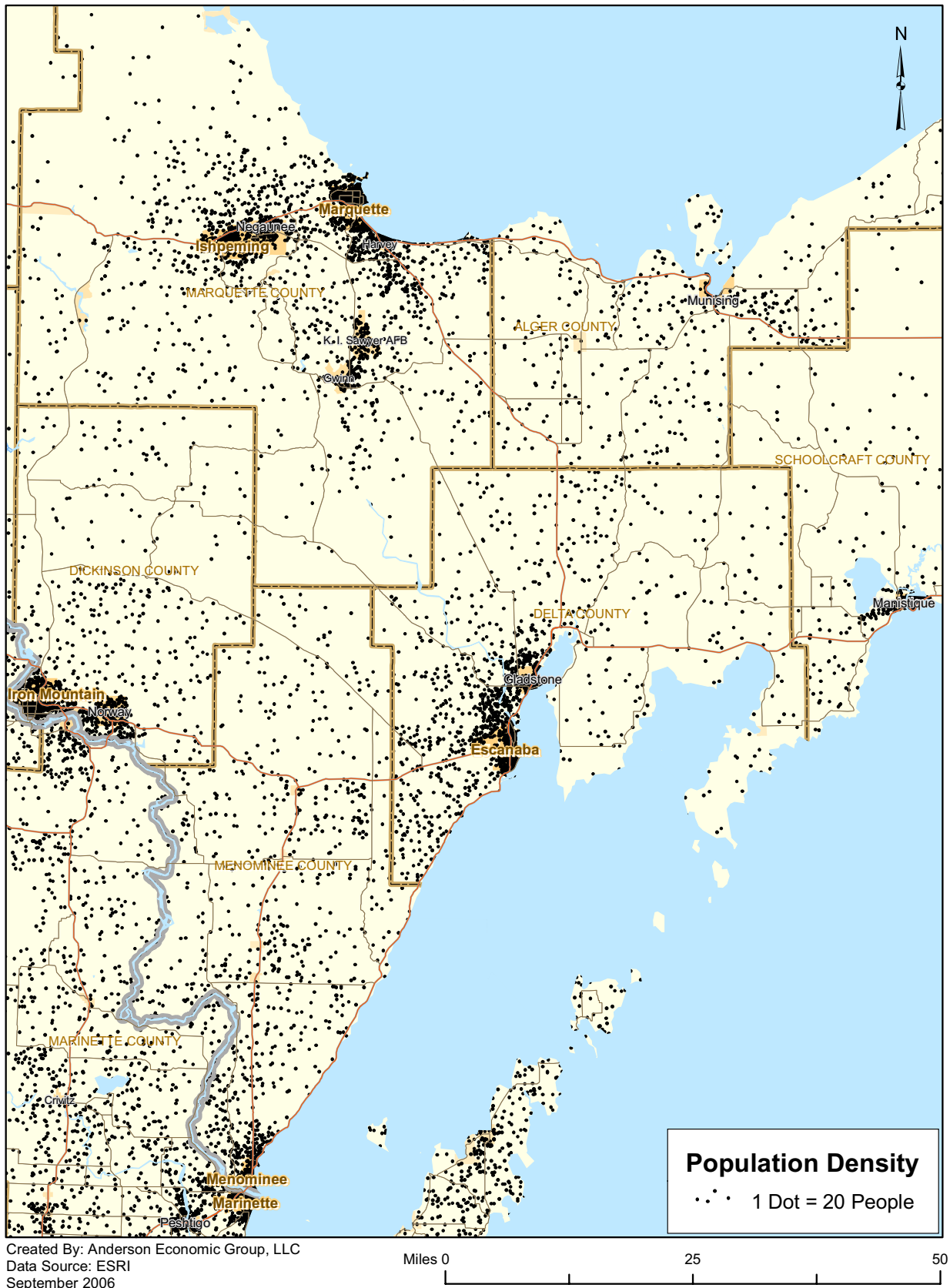
MAP 1. Escanaba Regional Overview



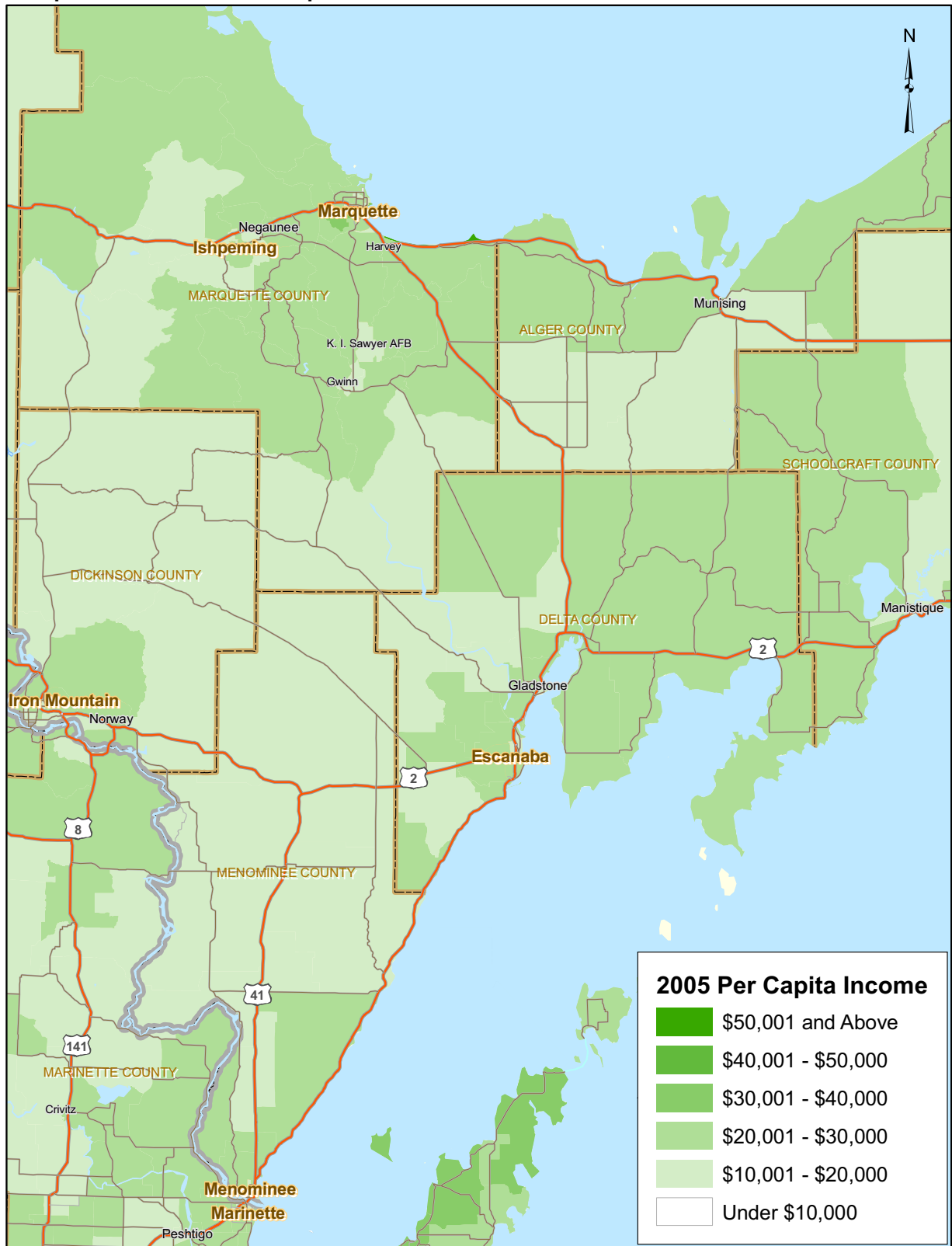
Created By: Anderson Economic Group, LLC
Data Source: ESRI
September 2006

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MAP 2. 2005 Population Density



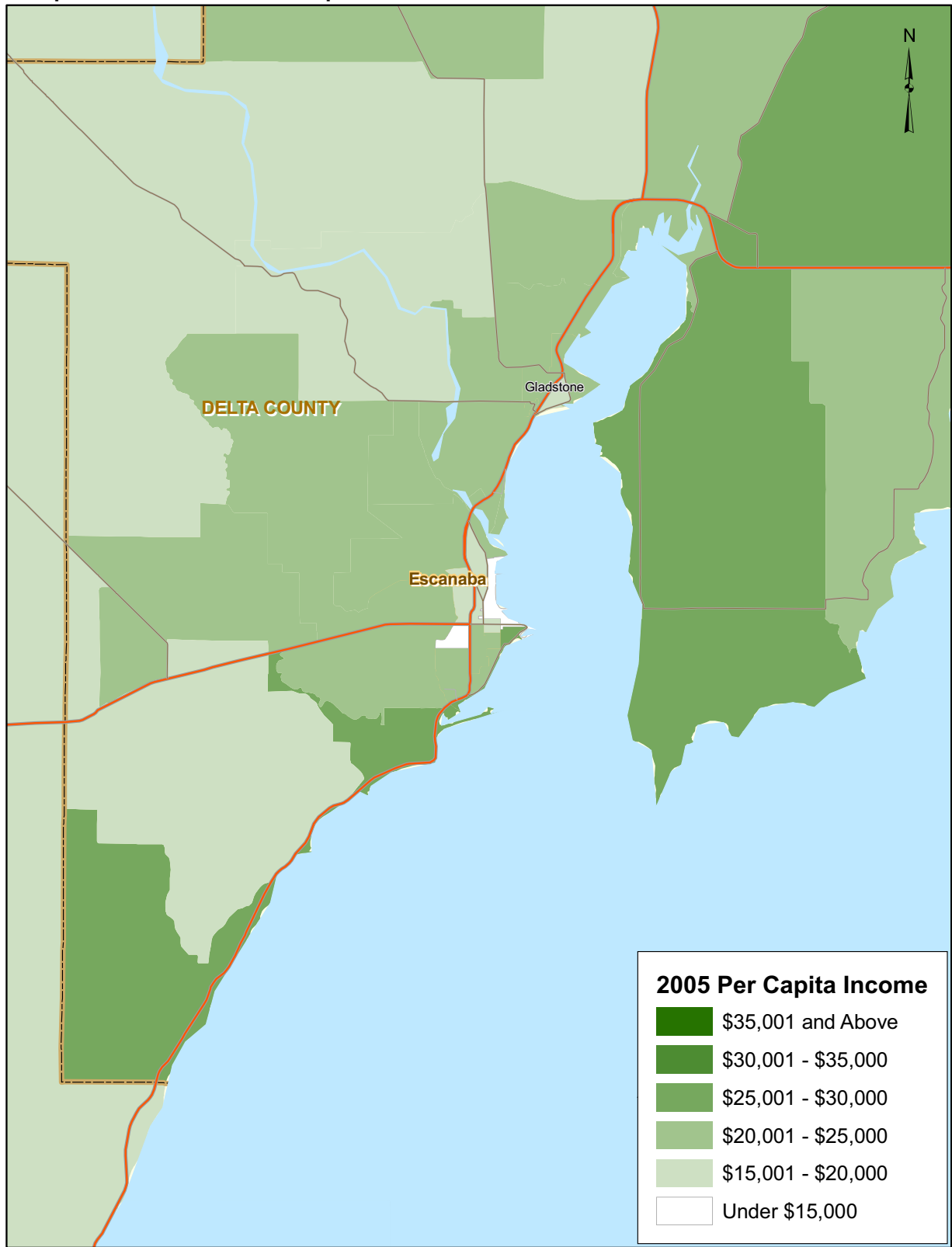
MAP 3. 2005 Regional Per Capita Income



Created By: Anderson Economic Group, LLC
 Data Source: ESRI
 September 2006

Miles 0 25 50

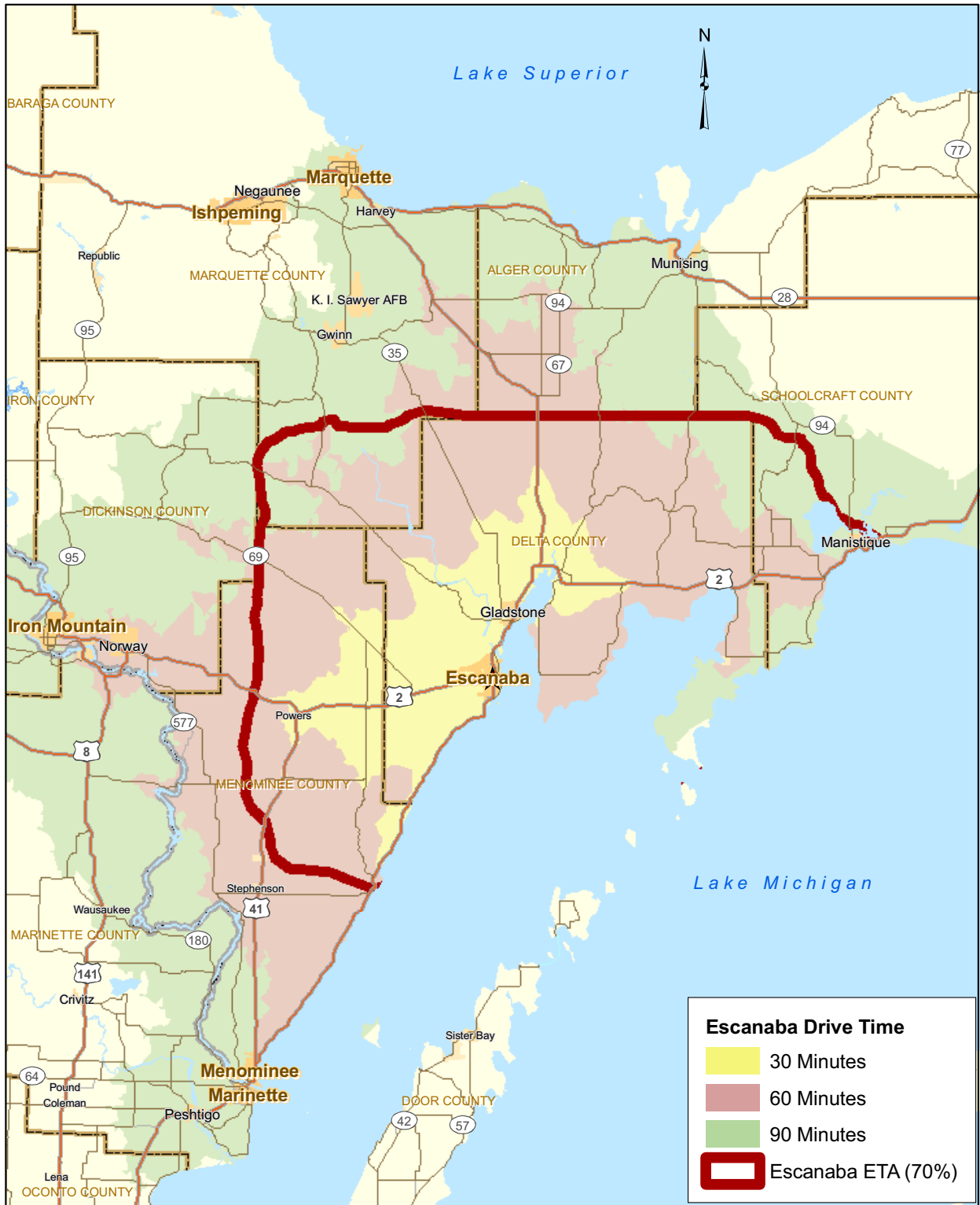
MAP 4. 2005 Escanaba Per Capita Income



Created By: Anderson Economic Group, LLC
Data Source: ESRI
September 2006

Miles 0 5 10

MAP 5. Downtown Escanaba 30, 60, 90 Minute Drive Time and Effective Trade Area



Created By: Anderson Economic Group, LLC
Data Source: ESRI
September 2006

Miles 0 30 60

MAP 6. Downtown Escanaba Parking Map

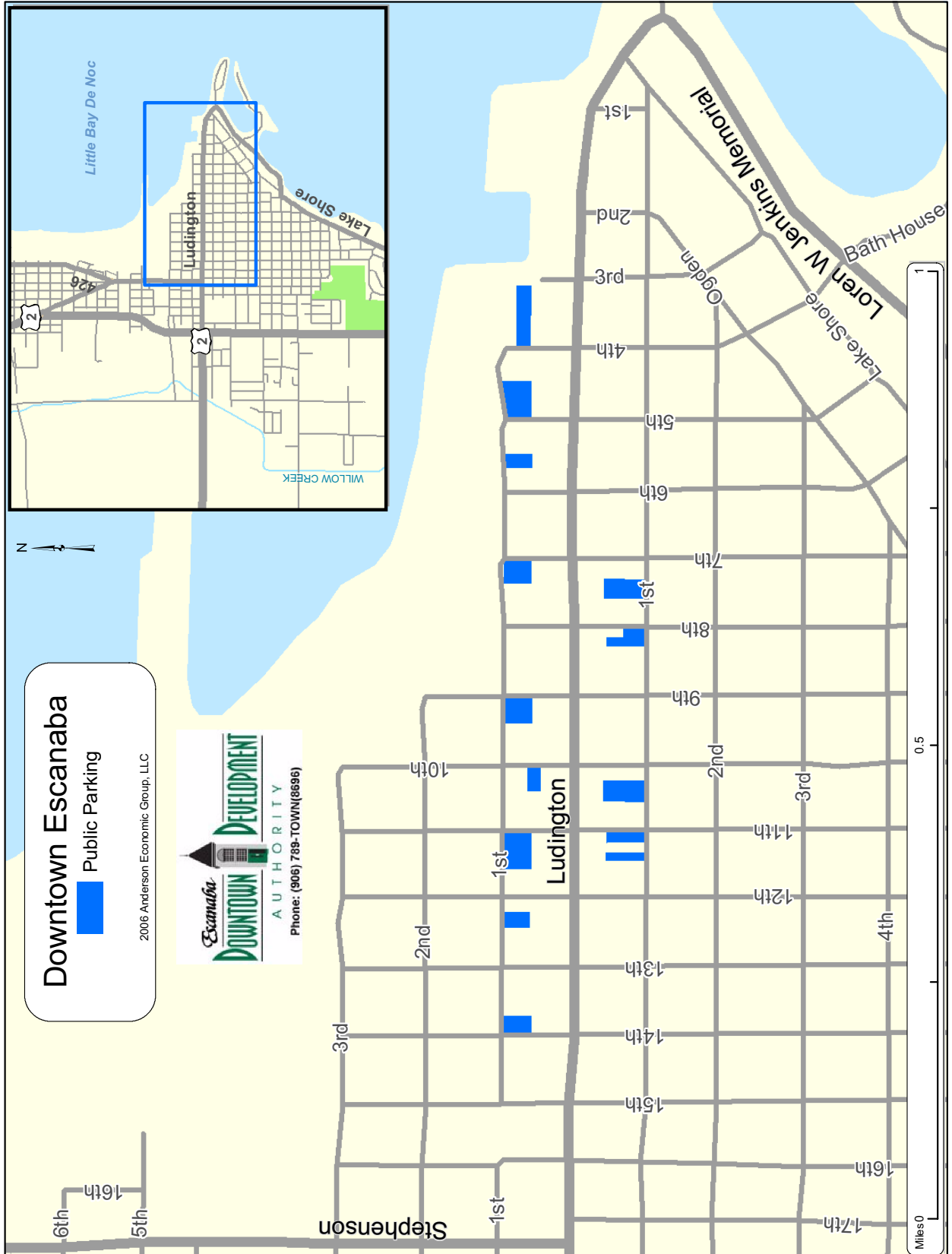


TABLE 1. Demographic and Socioeconomic Tables

	Michigan	Schoolcraft County	Alger County	Menominee County	Dickinson County	Delta County	Marquette County	Marinette County	ETA
POPULATION									
1990 Total Population (census)	9,295,297	8,302	8,972	24,920	26,831	37,780	70,887	40,548	48,236
1997 Total Population (interp.)	9,740,962	8,718	9,586	25,204	27,278	38,296	66,450	42,513	49,315
2000 Total Population (census)	9,938,444	8,903	9,862	25,326	27,472	38,520	64,634	43,384	49,785
2002 Total Population (interp.)	10,085,539	8,819	9,836	25,324	27,346	38,396	64,233	43,713	49,676
2005 Total Population	10,310,273	8,695	9,796	25,320	27,159	38,211	63,635	44,212	49,512
2010 Total Population	10,731,309	8,405	9,618	25,258	26,870	37,793	61,918	45,025	48,951
CAGR 1990-2000	0.7%	0.7%	1.0%	0.2%	0.2%	0.2%	-0.9%	0.7%	0.3%
CAGR 2000-2005	0.7%	-0.5%	-0.1%	0.0%	-0.2%	-0.2%	-0.3%	0.4%	-0.1%
CAGR 2005-2010	0.8%	-0.7%	-0.4%	0.0%	-0.2%	-0.2%	-0.5%	0.4%	-0.2%
2000 Pop in Group Quarters	249,889	381	986	435	467	569	4,036	1,468	1,008
2005 Group Quarters Population	254,134	385	984	435	467	569	4,319	1,454	1,012
2005 Group Quarters Population (%)	2.5%	4.4%	10.0%	1.7%	1.7%	1.5%	6.8%	3.3%	2.0%
1990 Median Age	32.6	37.5	36.7	35.8	36.3	35.2	30.7	35.6	35.4
2000 Median Age	35.5	41.5	41.2	40.4	40.0	40.4	37.5	40.5	
2005 Median Age	36.8	42.8	43.3	42.1	41.7	42.2	38.3	42.7	
PER CAPITA INCOME									
1989 Per Capita Income (census)	\$14,154	\$9,740	\$9,669	\$10,336	\$12,338	\$10,810	\$11,025	\$10,420	\$10,476
1990 Per Capita Income (interp.)	\$14,803	\$10,306	\$10,301	\$10,857	\$12,849	\$11,417	\$11,583	\$10,974	\$11,064
1997 Per Capita Income (interp.)	\$20,265	\$15,306	\$16,044	\$15,324	\$17,072	\$16,735	\$16,370	\$15,770	\$16,210
1999 Per Capita Income (census)	\$22,168	\$17,137	\$18,210	\$16,909	\$18,516	\$18,667	\$18,070	\$17,492	\$18,079
2000 Per Capita Income (interp.)	\$22,711	\$17,520	\$18,517	\$17,273	\$18,872	\$19,026	\$18,558	\$18,021	\$18,429
2002 Per Capita Income (interp.)	\$23,838	\$18,311	\$19,146	\$18,023	\$19,605	\$19,765	\$19,574	\$19,127	\$19,148
2005 Per Capita Income	\$25,633	\$19,566	\$20,130	\$19,211	\$20,758	\$20,928	\$21,203	\$20,914	\$20,281
2010 Per Capita Income	\$30,029	\$22,518	\$22,976	\$21,502	\$23,714	\$23,861	\$24,266	\$24,464	\$23,108
CAGR 1989-1999	4.6%	5.8%	6.5%	5.0%	4.1%	5.6%	5.1%	5.3%	5.6%
CAGR 1999-2005	2.5%	2.2%	1.7%	2.2%	1.9%	1.9%	2.7%	3.0%	1.9%
CAGR 2005-2010	3.2%	2.9%	2.7%	2.3%	2.7%	2.7%	2.7%	3.2%	2.6%
TOTAL PERSONAL INCOME									
1990 Total Personal Income (\$Mil.)	\$137,602,775,595	\$85,561,673	\$92,419,510	\$270,568,405	\$344,756,026	\$431,332,846	\$821,113,421	\$444,973,689	\$533,660,019
2000 Total Personal Income (\$Mil.)	\$220,316,999,600	\$152,569,400	\$179,583,900	\$428,248,700	\$508,669,000	\$719,042,700	\$1,167,910,900	\$758,892,100	\$899,921,314
2005 Total Personal Income (\$Mil.)	\$264,281,520,363	\$170,123,877	\$197,191,727	\$486,424,663	\$563,756,029	\$799,663,585	\$1,349,268,819	\$924,654,105	\$1,004,152,930
2010 Total Personal Income (\$Mil.)	\$322,255,595,896	\$189,267,497	\$220,986,538	\$543,089,508	\$637,207,133	\$901,772,275	\$1,502,523,823	\$1,101,503,327	\$1,131,177,699
CAGR 1990-2000	4.8%	6.0%	6.9%	4.7%	4.0%	5.2%	3.6%	5.5%	5.4%
CAGR 2000-2005	3.7%	2.2%	1.9%	2.6%	2.1%	2.1%	2.9%	4.0%	2.2%
CAGR 2005-2010	4.0%	2.2%	2.3%	2.2%	2.5%	2.4%	2.2%	3.6%	2.4%

Data: ESRI, Inc. 2005
Analysis: Anderson Economic Group, LLC.

TABLE 2. Demographic and Socioeconomic Tables

	Michigan	Schoolcraft County	Alger County	Menominee County	Dickinson County	Delta County	Marquette County	Marinette County	ETA
HOUSEHOLDS									
1990 Average Household Size	2.7	2.5	2.5	2.5	2.5	2.5	2.6	2.6	2.6
2000 Average Household Size	2.6	2.4	2.4	2.4	2.4	2.4	2.4	2.4	2.4
2005 Average Household Size	2.5	2.3	2.3	2.3	2.3	2.3	2.3	2.3	2.4
1990 Total Households	3,419,331	3,294	3,337	9,766	10,633	14,531	25,435	15,542	18,535
2000 Total Households	3,785,661	3,606	3,785	10,529	11,386	15,836	25,767	17,585	20,320
2005 Total Households	3,980,867	3,590	3,850	10,766	11,468	16,086	26,034	18,414	20,682
2010 Total Households	4,176,763	3,503	3,824	10,871	11,456	16,119	25,755	19,022	20,706
CAGR 1990-2000 (%)	1.0%	0.9%	1.3%	0.8%	0.7%	0.9%	0.1%	1.2%	0.9%
CAGR 2000-2005 (%)	1.0%	-0.1%	0.3%	0.4%	0.1%	0.3%	0.2%	0.9%	0.4%
CAGR 2005-2010 (%)	1.0%	-0.5%	-0.1%	0.2%	0.0%	0.0%	-0.2%	0.7%	0.0%
HOUSEHOLD INCOME TOTALS									
2000 Median HH Income	\$44,683	\$30,933	\$35,866	\$33,009	\$34,809	\$35,522	\$35,526	\$35,255	\$34,221
2005 Median HH Income	\$50,118	\$34,085	\$39,739	\$36,332	\$38,024	\$39,305	\$39,408	\$39,575	\$37,851
2010 Median HH Income	\$55,605	\$37,463	\$42,966	\$39,352	\$41,538	\$43,397	\$43,001	\$44,424	\$41,690
1990 Average HH Income	\$38,064	\$24,371	\$25,036	\$26,189	\$30,885	\$28,062	\$29,885	\$26,728	\$27,211
2000 Average HH Income	\$57,400	\$40,824	\$42,534	\$39,855	\$43,798	\$44,644	\$44,414	\$42,437	\$43,331
2005 Average HH Income	\$65,583	\$46,034	\$47,992	\$44,671	\$48,645	\$49,265	\$49,733	\$49,235	\$47,939
2010 Average HH Income	\$76,307	\$52,498	\$54,203	\$49,400	\$55,054	\$55,453	\$56,002	\$56,859	\$53,947
1990 Aggregate HH Income	\$217,296,941,400	\$147,211,344	\$160,991,190	\$419,633,295	\$498,684,028	\$706,982,384	\$1,144,415,538	\$746,254,645	\$880,485,920
2000 Aggregate HH Income	\$217,474,927,400	\$147,618,400	\$161,502,500	\$420,115,500	\$499,607,800	\$706,261,700	\$1,143,135,600	\$746,471,400	\$879,886,773
2005 Aggregate HH Income	\$261,073,374,145	\$165,263,700	\$184,769,871	\$480,933,294	\$557,860,697	\$792,480,621	\$1,294,746,466	\$906,604,901	\$991,383,600
2010 Aggregate HH Income	\$318,713,543,231	\$183,901,468	\$207,271,806	\$537,026,593	\$630,698,210	\$893,841,703	\$1,442,326,740	\$1,081,575,548	\$1,117,079,326
URBAN V. RURAL									
1990 Sample Population	9,295,297	8,302	8,972	24,920	26,831	37,780	70,887	40,548	48,254
1990 Urban Pop: Inside UA	5,811,662	0	0	0	0	0	0	0	0
1990 Urban Pop: Outside UA	743,184	3,456	2,783	9,398	16,767	18,224	40,375	14,997	21,546
1990 Rural Farm Pop	120,496	63	126	629	126	489	119	1,284	731
1990 Rural Nonfarm Pop	2,619,955	4,783	6,063	14,893	9,938	19,067	30,393	24,267	25,977
2000 Sample Population	9,938,444	8,903	9,862	25,326	27,472	38,520	64,634	43,384	49,779
2000 Pop by Urban/Rural Base	9,938,444	8,903	9,862	25,326	27,472	38,520	64,634	43,384	49,779
2000 Pop: Urban/in Urbanzd Area	6,580,632	0	0	0	0	0	0	0	0
2000 Pop: Urban/in Urb Cluster	838,892	3,672	0	9,235	19,863	21,117	37,526	17,348	24,648
2000 Pop: Rural/Farm	94,192	68	103	551	191	269	111	981	569
2000 Pop: Rural/Nonfarm	2,424,728	5,163	9,759	15,540	7,418	17,134	26,997	25,055	24,563

Data: ESRI, Inc. 2005
Analysis: Anderson Economic Group, LLC.

TABLE 3. Demographic and Socioeconomic Tables

ETHNICITY AND RACE (#)	Michigan		Schoolcraft County		Alger County		Menominee County		Dickinson County		Delta County		Marquette County		Marinette County		ETA	
1990 Total Population (census)	9,295,297	8,302	8,972	24,920	26,831	37,780	70,887	40,548	48,236									
1990 White / Caucasian	7,639,405	7,574	8,277	24,220	26,308	36,340	67,078	40,010	46,061									
1990 Black / African American	1,271,373	7	213	7	23	16	1,165	8	23									
1990 American Indian / Aleut	55,501	511	301	382	135	806	943	150	1,351									
1990 Asian	103,341	12	24	56	105	98	511	56	114									
1990 Pacific	1,482	1	0	4	1	1	26	7	1									
1990 Other Race	86,649	8	9	7	35	37	209	47	43									
1990 Two or More Races	137,546	189	148	244	224	482	955	270	643									
2000 Total Population (census)	9,938,444	8,903	9,862	25,326	27,472	38,520	64,634	43,384	49,785									
2000 White / Caucasian	7,966,053	7,894	8,660	24,375	26,909	36,913	61,478	42,550	47,043									
2000 Black / African American	1,412,742	145	603	25	32	36	853	100	180									
2000 American Indian / Aleut	58,479	545	325	576	142	850	964	215	1,567									
2000 Asian	176,510	37	32	54	109	121	319	119	159									
2000 Pacific	2,692	0	4	1	8	12	14	9	12									
2000 Other Race	129,552	33	38	46	39	53	160	91	86									
2000 Two or More Races	192,416	249	200	249	233	535	846	300	738									
2000 Hispanic - of any race	323,877	83	99	190	187	187	444	325	290									
2005 Population by Race Base	10,310,273	8,695	9,796	25,320	27,159	38,211	63,635	44,212	49,512									
2005 White / Caucasian	8,148,083	7,653	8,573	24,362	26,524	36,488	60,185	43,251	46,612									
2005 Black / African American	1,486,835	151	623	26	34	38	893	118	189									
2005 American Indian / Aleut	60,591	539	325	578	143	857	962	233	1,579									
2005 Asian	242,102	49	32	55	146	163	472	158	213									
2005 Pacific	3,403	0	4	1	10	15	17	11	15									
2005 Other Race	152,226	34	38	46	44	60	177	110	94									
2005 Two or More Races	217,033	269	201	252	258	590	929	331	811									
2005 Hispanic - of any race	383,714	92	99	191	217	217	569	396	329									

Data: ESRI, Inc. 2005
Analysis: Anderson Economic Group, LLC.

TABLE 4. Demographic and Socioeconomic Tables

ETHNICITY AND RACE (%)	Michigan		Schoolcraft County		Alger County		Menominee County		Dickinson County		Delta County		Marquette County		ETA	
1990 Pop by Race Base (%)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
1990 White / Caucasian (%)	82.2%	91.2%	0.1%	92.3%	97.2%	98.1%	98.1%	96.2%	98.1%	98.1%	96.2%	94.6%	98.7%	98.7%	95.5%	95.5%
1990 Black / African American (%)	13.7%	0.1%	6.2%	2.4%	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%
1990 American Indian / Aleut (%)	0.6%	6.2%	0.1%	3.4%	1.5%	0.5%	0.4%	2.1%	0.5%	0.3%	2.1%	1.3%	0.4%	0.4%	2.8%	2.8%
1990 Asian (%)	1.1%	0.1%	0.1%	0.3%	0.2%	0.4%	0.3%	0.3%	0.4%	0.0%	0.3%	0.7%	0.1%	0.1%	0.2%	0.2%
1990 Pacific (%)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
1990 Other Race (%)	0.9%	0.1%	0.1%	0.1%	0.0%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.3%	0.1%	0.1%	0.1%	0.1%
1990 Two or More Races (%)	1.5%	2.3%	2.3%	1.6%	1.0%	0.8%	1.0%	1.3%	0.8%	1.3%	1.3%	1.3%	0.7%	0.7%	1.3%	1.3%
2000 Pop by Race Base (%)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
2000 White / Caucasian (%)	80.2%	88.7%	1.6%	87.8%	96.2%	98.0%	98.0%	95.8%	98.0%	98.0%	95.8%	95.1%	98.1%	98.1%	94.5%	94.5%
2000 Black / African American (%)	14.2%	6.1%	6.1%	6.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	1.3%	0.2%	0.2%	0.4%	0.4%
2000 American Indian / Aleut (%)	0.6%	6.1%	0.4%	3.3%	2.3%	0.5%	0.4%	2.2%	0.5%	0.5%	2.2%	1.5%	0.5%	0.5%	3.1%	3.1%
2000 Asian (%)	1.8%	0.4%	0.0%	0.3%	0.2%	0.4%	0.3%	0.3%	0.4%	0.3%	0.3%	0.5%	0.3%	0.3%	0.3%	0.3%
2000 Pacific (%)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2000 Other Race (%)	1.3%	0.4%	0.4%	0.4%	0.2%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.2%	0.2%	0.2%	0.2%	0.2%
2000 Two or More Races (%)	1.9%	2.8%	2.8%	2.0%	1.0%	0.8%	1.0%	1.4%	0.8%	1.4%	1.4%	1.3%	0.7%	0.7%	1.5%	1.5%
2000 Hispanic - of any race (%)	3.3%	0.9%	0.9%	1.0%	0.8%	0.7%	0.8%	0.5%	0.7%	0.5%	0.5%	0.7%	0.7%	0.7%	0.6%	0.6%
2005 Pop by Race Base (%)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
2005 White / Caucasian (%)	79.0%	88.0%	1.7%	87.5%	96.2%	97.7%	97.7%	95.5%	97.7%	97.7%	95.5%	94.6%	97.8%	97.8%	94.1%	94.1%
2005 Black / African American (%)	14.4%	6.2%	6.2%	6.4%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	0.1%	1.4%	0.3%	0.3%	0.4%	0.4%
2005 American Indian / Aleut (%)	0.6%	6.2%	0.6%	3.3%	2.3%	0.5%	0.5%	2.2%	0.5%	0.5%	2.2%	1.5%	0.5%	0.5%	3.2%	3.2%
2005 Asian (%)	2.3%	0.6%	0.0%	0.3%	0.2%	0.5%	0.4%	0.4%	0.5%	0.4%	0.4%	0.7%	0.4%	0.4%	0.4%	0.4%
2005 Pacific (%)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2005 Other Race (%)	1.5%	0.4%	0.4%	0.4%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.2%	0.3%	0.2%	0.2%	0.2%	0.2%
2005 Two or More Races (%)	2.1%	3.1%	3.1%	2.1%	1.0%	0.9%	1.0%	1.5%	0.9%	1.5%	1.5%	1.5%	0.7%	0.7%	1.6%	1.6%
2005 Hispanic - of any race (%)	3.7%	1.1%	1.1%	1.0%	0.8%	0.8%	0.8%	0.6%	0.8%	0.6%	0.6%	0.9%	0.9%	0.9%	0.7%	0.7%

TABLE 5. Demographic and Socioeconomic Tables

	Michigan	Schoolcraft County	Alger County	Menominee County	Dickinson County	Delta County	Marquette County	ETA
ADULT EDUCATIONAL ATTAINMENT								
2000 Pop 25+ by Educ Base	6,415,941	6,272	7,169	17,342	18,831	26,362	41,934	34,076
2000 Pop 25+/Educ: No School	54,757	15	38	87	77	165	161	189
2000 Pop 25+/Educ: Nurs-4th	18,887	18	18	45	15	35	37	60
2000 Pop 25+/Educ: 5-6th Grd	48,289	31	47	60	52	119	134	157
2000 Pop 25+/Educ: 7-8th Grd	177,081	293	325	822	429	952	1,227	1,366
2000 Pop 25+/Educ: 9th Grade	133,539	167	219	313	311	440	697	648
2000 Pop 25+/Educ: 10th Grade	214,203	284	273	559	500	807	1,054	1,095
2000 Pop 25+/Educ: 11th Grade	206,512	273	195	466	457	578	776	826
2000 Pop 25+/Educ: 12th Grade	210,865	210	208	514	273	563	747	796
2000 Pop 25+/Educ: HS Grad	2,010,861	2,754	3,035	8,041	8,365	9,444	14,815	12,986
2000 Pop 25+/Educ: Coll <1 Yr	534,119	513	601	1,310	1,409	2,329	3,100	2,936
2000 Pop 25+/Educ: Coll 1 + Yrs	962,457	648	862	2,201	2,477	3,849	6,574	4,786
2000 Pop 25+/Educ: Assoc Deg	448,112	356	296	1,021	1,328	2,578	2,669	3,012
2000 Pop 25+/Educ: Bach Deg	878,680	514	760	1,336	2,091	3,070	6,685	3,611
2000 Pop 25+/Educ: Mast Deg	363,931	122	200	409	755	1,034	2,134	1,158
2000 Pop 25+/Educ: Prof Deg	103,840	57	57	121	241	337	590	382
2000 Pop 25+/Educ: Doct Deg	49,808	17	35	37	51	62	534	69
2000 Thru 8th Grade or Lower (#)	299,014	357	428	1,014	573	1,271	1,559	1,772
2000 Some College (#)	3,340,947	2,227	2,811	6,435	8,352	13,259	22,286	15,954
2000 4-Yr. Degree or More (#)	1,396,259	710	1,052	1,903	3,138	4,503	9,943	5,220
2000 Thru 8th Grade or Lower (%)	4.7%	5.7%	6.0%	5.8%	3.0%	4.8%	3.7%	5.2%
2000 Some College (%)	52.1%	35.5%	39.2%	37.1%	44.4%	50.3%	53.1%	46.8%
2000 4-Yr. Degree or More (%)	21.8%	11.3%	14.7%	11.0%	16.7%	17.1%	23.7%	15.3%

Data: ESRI, Inc. 2005
Analysis: Anderson Economic Group, LLC.

TABLE 6. Demographic and Socioeconomic Tables

MODE OF TRAVEL TO WORK (#)	Michigan		Schoolcraft County		Alger County		Menominee County		Dickinson County		Delta County		Marquette County		ETA	
			County		County			County			County			County		
2000 Wrkrs/Transp to Wrk Base	4,540,372	3,204	3,713	11,617	12,038	17,116	30,045	19,991	21,478							
2000 Wrkrs 16+: Worked at Home	127,765	166	154	386	285	446	698	909	690							
2000 Wrkrs/Transp: Car-Alone	3,776,535	2,384	2,823	9,445	9,810	14,283	24,127	15,625	17,559							
2000 Wrkrs/Transp: Carpooled	440,606	443	444	1,240	1,464	1,698	3,275	2,284	2,271							
2000 Wrkrs/Transp: Bus	54,423	24	33	9	13	90	169	47	113							
2000 Wrkrs/Transp: Streetcar	560	0	0	5	0	0	1	0	0							
2000 Wrkrs/Transp: Subway	576	0	0	0	0	0	0	0	0							
2000 Wrkrs/Transp: Railroad	290	0	0	0	0	2	0	0	2							
2000 Wrkrs/Transp: Ferryboat	466	0	0	0	0	0	0	0	0							
2000 Wrkrs/Transp: Taxicab	4,222	2	5	26	2	41	8	9	9							
2000 Wrkrs/Transp: Motorcycle	1,698	0	2	9	0	19	16	20	2							
2000 Wrkrs/Transp: Bicycle	10,034	3	5	56	30	26	151	93	93							
2000 Wrkrs/Transp: Walked	101,506	153	222	344	356	419	1,515	865	2,271							
2000 Wrkrs/Transp: Other Means	21,691	29	25	97	78	92	85	137	115							
2000 Wrkrs 16+ Not Home Base	4,412,607	3,038	3,559	11,231	11,753	16,670	29,347	19,082	17,559							
2000 Wrkrs/Transp: Total Private Trans (#)	3,788,267	2,387	2,830	9,510	9,840	14,328	24,294	15,738	17,559							
2001 Wrkrs/Transp: Total Carpooled Trans (#)	440,606	443	444	1,240	1,464	1,698	3,275	2,284	2,271							
2000 Wrkrs/Transp: Total Public Trans (#)	60,537	26	38	40	15	133	178	58	115							
2000 Wrkrs/Transp: Total Other Trans (#)	123,197	182	247	441	434	511	1,600	1,002	0							
2000 Wrkrs/Transp: Total Private Trans (%)	83.4%	74.5%	76.2%	81.9%	81.7%	83.7%	80.9%	78.7%	81.8%							
2001 Wrkrs/Transp: Total Carpooled Trans (%)	9.7%	13.8%	12.0%	10.7%	12.2%	9.9%	10.9%	11.4%	10.6%							
2000 Wrkrs/Transp: Total Public Trans (%)	1.3%	0.8%	1.0%	0.3%	0.1%	0.8%	0.6%	0.3%	0.5%							
2000 Wrkrs/Transp: Total Other Trans (%)	2.7%	5.7%	6.7%	3.8%	3.6%	3.0%	5.3%	5.0%	0.0%							

TRAVEL TIME TO WORK	Michigan		Schoolcraft County		Alger County		Menominee County		Dickinson County		Delta County		Marquette County		ETA	
2000 Wrkrs/Trvl Time < 5 min	158,315	356	364	935	928	1,032	2,209	1,572	1,572							
2000 Wrkrs/Trvl Time 5-9 min	507,653	741	834	2,434	3,234	3,286	6,661	4,187	4,187							
2000 Wrkrs/Trvl Time 10-14 min	681,990	522	641	2,348	2,975	4,024	5,676	3,809	3,809							
2000 Wrkrs/Trvl Time 15-19 min	708,036	500	454	1,658	1,745	3,025	4,481	2,845	2,845							
2000 Wrkrs/Trvl Time 20-24 min	675,865	291	284	1,069	1,134	2,021	3,633	1,925	1,925							
2000 Wrkrs/Trvl Time 25-29 min	291,938	75	155	462	362	593	1,511	701	701							
2000 Wrkrs/Trvl Time 30-34 min	546,870	114	229	844	491	990	2,432	1,258	1,258							
2000 Wrkrs/Trvl Time 35-39 min	126,158	28	55	279	74	209	520	306	306							
2000 Wrkrs/Trvl Time 40-44 min	147,930	48	85	213	127	199	452	312	312							
2000 Wrkrs/Trvl Time 45-59 min	304,785	105	259	446	267	386	771	866	866							
2000 Wrkrs/Trvl Time 60-89 min	171,403	146	139	229	226	526	542	841	841							
2000 Wrkrs/Trvl Time 90+ min	91,664	112	60	314	190	379	459	460	460							
2000 Avg Travel Time to Work	24	21	20	20	16	19	18	20	20							
2000 Aggr Travel Time to Work	106,381,590	63,145	70,550	221,135	184,555	313,920	518,915	383,060	383,060							

Data: ESRI, Inc. 2005
 Analysis: Anderson Economic Group, LLC.

TABLE 7. Demographic and Socioeconomic Tables

	Michigan	Schoolcraft County	Alger County	Menominee County	Dickinson County	Delta County	Marquette County	Marinette County	ETA
VEHICLE OWNERSHIP									
2000 HHs by Vehicles Base	3,785,661	3,606	3,785	10,529	11,386	15,836	25,767	17,585	20,319
2000 HHs by Veh Avail: 0	290,240	267	234	783	800	1,058	2,116	1,181	1,397
2000 HHs by Veh Avail: 1	1,277,655	1,209	1,257	3,442	3,830	5,242	8,158	5,376	6,723
2000 HHs by Veh Avail: 2	1,541,576	1,610	1,645	4,410	4,845	6,671	10,652	7,514	8,505
2000 HHs by Veh Avail: 3	486,498	393	485	1,405	1,456	2,120	3,508	2,567	2,757
2000 HHs by Veh Avail: 4	136,894	101	128	380	372	567	949	717	717
2000 HHs by Veh Avail: 5+	52,798	26	36	109	83	178	384	230	220
2000 Households with 0 Cars (#)	290,240	267	234	783	800	1,058	2,116	1,181	1,397
2000 Households with 1 or More Cars (#)	3,495,421	3,339	3,551	9,746	10,586	14,778	23,651	16,404	18,922
2000 Households with 2 or More Cars (#)	2,217,766	2,130	2,294	6,304	6,756	9,536	15,493	11,028	12,199
2000 Households with 3 or More Cars (#)	676,190	520	649	1,894	1,911	2,865	4,841	3,514	3,694
2000 Households with 0 Cars (%)	7.7%	7.4%	6.2%	7.4%	7.0%	6.7%	8.2%	6.7%	6.9%
2000 Households with 1 or More Cars (%)	92.3%	92.6%	93.8%	92.6%	93.0%	93.3%	91.8%	93.3%	93.1%
2000 Households with 2 or More Cars (%)	58.6%	59.1%	60.6%	59.9%	59.3%	60.2%	60.1%	62.7%	60.0%
2000 Households with 3 or More Cars (%)	17.9%	14.4%	17.1%	18.0%	16.8%	18.1%	18.8%	20.0%	18.2%
2000 Avg # of Vehicles: HHs	1.8	1.7	1.8	1.8	1.7	1.8	1.8	1.8	1.8
2000 Aggr # of Vehicles: HHs	6,668,251	6,158	6,704	18,606	19,837	28,228	45,880	32,257	36,118

TABLE 8. Demographic and Socioeconomic Tables

	Michigan	Schoolcraft County	Alger County	Menominee County	Dickinson County	Delta County	Marquette County	Marinette County	ETA
HOUSING UNIT GROWTH AND TENURE									
1990 Total Housing Units	3,847,926	5,487	5,775	12,509	12,902	17,928	31,049	25,650	24,010
1990 Owner Occupied HUs	2,427,643	2,537	2,671	7,709	8,445	11,066	16,332	12,033	14,230
1990 Percent Owner Occ.	63.1%	46.2%	46.3%	61.6%	65.5%	61.7%	52.6%	46.9%	59.3%
1990 Renter Occupied HUs	991,688	757	666	2,057	2,188	3,465	9,103	3,509	4,305
1990 Vacant HUs	428,595	2,193	2,438	2,743	2,269	3,397	5,614	10,108	5,475
1990 Vacancy Rate	11.1%	40.0%	42.2%	21.9%	17.6%	18.9%	18.1%	39.4%	22.8%
2000 Total Housing Units	4,234,279	5,700	5,964	13,639	13,702	19,223	32,877	26,260	25,865
2000 Owner Occupied HUs	2,793,124	2,958	3,121	8,371	9,130	12,601	17,985	13,951	16,200
2000 Percent Owner Occ.	66.0%	51.9%	52.3%	61.4%	66.6%	65.6%	54.7%	53.1%	62.6%
2000 Renter Occupied HUs	992,537	648	664	2,158	2,256	3,235	7,782	3,634	4,121
2000 Vacant HUs	448,618	2,094	2,179	3,110	2,316	3,387	7,110	8,675	5,544
2000 Vacancy Rate	10.6%	36.7%	36.5%	22.8%	16.9%	17.6%	21.6%	33.0%	21.4%
2005 Total Housing Units	4,451,717	5,917	6,160	14,299	14,003	19,261	33,477	27,592	26,309
2005 Owner Occupied HUs	2,996,961	2,977	3,220	8,673	9,322	12,963	18,577	14,765	16,704
2005 Percent Owner Occ.	67.3%	50.3%	52.3%	60.7%	66.6%	67.3%	55.5%	53.5%	63.5%
2005 Renter Occupied HUs	983,906	613	630	2,093	2,146	3,123	7,457	3,649	3,977
2005 Vacant Housing Units	470,850	2,327	2,310	3,533	2,535	3,175	7,443	9,178	5,627
2005 Vacancy Rate	10.6%	39.3%	37.5%	24.7%	18.1%	16.5%	22.2%	33.3%	21.4%
2010 Total Housing Units	4,674,583	5,977	6,190	14,685	14,095	19,270	33,357	28,657	26,486
2010 Owner Occupied HUs	3,173,318	2,915	3,209	8,791	9,347	13,040	18,488	15,311	16,791
2010 Percent Owner Occ.	67.9%	48.8%	51.8%	59.9%	66.3%	67.7%	55.4%	53.4%	63.4%
2010 Renter Occupied HUs	1,003,445	588	615	2,080	2,109	3,079	7,267	3,711	3,914
2010 Vacant Housing Units	497,820	2,474	2,366	3,814	2,639	3,151	7,602	9,635	5,780
2010 Vacancy Rate	10.6%	41.4%	38.2%	26.0%	18.7%	16.4%	22.8%	33.6%	21.8%
2000 Avg HH Size: Renter Occ	2.2								
2000 Avg HH Size: Owner Occ	2.7	2.4	2.4	2.4	2.5	2.5	2.5	2.5	2.5

TABLE 9. Demographic and Socioeconomic Tables

HOUSEHOLD INCOME CATEGORIES	Michigan		Schoolcraft County		Alger County		Menominee County		Dickinson County		Delta County		Marquette County		ETA	
			County		County		County		County		County		County		County	
2000 Household Income Base	3,788,780		3,616	3,797	10,541	11,407	15,820	25,738	17,590	20,306						
2000 HHs w/Inc <\$10000	313,905	431	383	383	1,209	1,151	1,584	2,700	1,521	2,162						
2000 HHs w/Inc \$10000-14999	219,133	315	277	811	890	933	1,417	1,953	1,563	1,779						
2000 HHs w/Inc \$15000-19999	227,379	399	321	890	963	920	1,236	2,025	1,392	1,728						
2000 HHs w/Inc \$20000-24999	241,721	329	252	963	926	899	1,120	2,200	1,405	1,530						
2000 HHs w/Inc \$25000-29999	236,089	272	300	926	926	830	1,243	1,938	1,459	1,634						
2000 HHs w/Inc \$30000-34999	234,330	292	312	741	741	830	1,193	1,883	1,377	1,530						
2000 HHs w/Inc \$35000-39999	219,661	206	275	762	762	758	996	1,444	1,330	1,271						
2000 HHs w/Inc \$40000-44999	214,406	224	278	613	613	798	745	1,586	1,151	1,008						
2000 HHs w/Inc \$45000-49999	190,259	173	235	559	559	556	896	1,455	948	1,105						
2000 HHs w/Inc \$50000-59999	353,430	301	388	1,083	1,083	1,010	1,504	2,394	1,649	1,897						
2000 HHs w/Inc \$60000-74999	425,325	265	361	988	988	1,070	1,817	2,567	1,689	2,181						
2000 HHs w/Inc \$75000-99999	432,681	248	246	647	647	829	1,128	2,273	1,293	1,394						
2000 HHs w/Inc \$100000-124999	222,789	79	90	182	182	350	546	595	469	627						
2000 HHs w/Inc \$125000-149999	102,177	27	35	69	69	136	202	282	162	226						
2000 HHs w/Inc \$150000-199999	79,291	16	13	43	43	79	94	242	80	104						
2000 HHs w/Inc \$200000+	76,204	39	31	55	55	90	99	201	102	130						
2005 Households by Income Base	3,980,823	3,590	3,850	10,766	11,468	16,086	26,034	18,414	20,682							
2005 HHs w/Inc <\$10000	296,551	391	360	1,149	1,067	1,480	2,516	1,475	2,024							
2005 HHs w/Inc \$10000-14999	192,352	265	238	706	835	1,196	1,662	1,186	1,512							
2005 HHs w/Inc \$15000-19999	212,398	339	287	811	872	1,169	1,865	1,379	1,593							
2005 HHs w/Inc \$20000-24999	223,907	316	243	896	852	1,079	1,995	1,232	1,484							
2005 HHs w/Inc \$25000-29999	225,532	267	265	845	846	1,127	1,891	1,341	1,493							
2005 HHs w/Inc \$30000-34999	219,426	259	284	767	795	1,114	1,750	1,323	1,460							
2005 HHs w/Inc \$35000-39999	216,208	224	260	712	735	1,003	1,497	1,374	1,287							
2005 HHs w/Inc \$40000-44999	210,285	201	267	664	718	815	1,466	1,100	1,076							
2005 HHs w/Inc \$45000-49999	188,558	174	235	547	612	762	1,391	1,079	990							
2005 HHs w/Inc \$50000-59999	364,254	302	414	1,065	1,025	1,589	2,519	1,674	1,981							
2005 HHs w/Inc \$60000-74999	445,458	315	410	1,148	1,137	1,882	2,725	1,912	2,308							
2005 HHs w/Inc \$75000-99999	492,626	279	314	849	990	1,460	2,623	1,832	1,802							
2005 HHs w/Inc \$100000-124999	301,353	131	145	335	502	751	1,057	838	897							
2005 HHs w/Inc \$125000-149999	161,220	49	63	122	228	347	438	349	400							
2005 HHs w/Inc \$150000-199999	115,257	27	24	69	125	165	336	161	187							
2005 HHs w/Inc \$200000-249999	49,988	21	18	41	62	75	140	80	89							
2005 HHs w/Inc \$250000-499999	53,731	25	20	35	58	65	141	70	85							
2005 HHs w/Inc \$500000+	11,719	5	3	5	9	7	22	9	12							

Data: ESRI, Inc. 2005
Analysis: Anderson Economic Group, LLC.

TABLE 10. Demographic and Socioeconomic Tables

	Michigan	Schoolcraft County	Alger County	Menominee County	Dickinson County	Delta County	Marquette County	ETA
2005 HHs w/line \$14,999 and Below (%)	12.3%	18.3%	15.5%	17.2%	16.6%	16.6%	16.0%	17.1%
2005 HHs w/line \$15,000 - \$29,999 (%)	16.6%	25.7%	20.6%	23.7%	22.4%	21.0%	22.1%	22.1%
2005 HHs w/line \$30,000 - \$44,999 (%)	16.2%	19.1%	21.1%	19.9%	19.6%	18.2%	18.1%	18.5%
2005 HHs w/line \$45,000 - \$59,999 (%)	13.9%	13.3%	16.9%	15.0%	14.3%	14.6%	15.0%	14.4%
2005 HHs w/line \$60,000 - \$74,999 (%)	11.2%	8.8%	10.6%	10.7%	9.9%	11.7%	10.5%	11.2%
2005 HHs w/line \$75,000 - \$99,999 (%)	12.4%	7.8%	8.2%	7.9%	8.6%	9.1%	10.1%	8.7%
2005 HHs w/line \$100,000 - \$124,999 (%)	7.6%	3.6%	3.8%	3.1%	4.4%	4.7%	4.1%	4.3%
2005 HHs w/line \$125,000 - \$149,999 (%)	4.0%	1.4%	1.6%	1.1%	2.0%	2.2%	1.7%	1.9%
2005 HHs w/line \$150,000 - \$199,999 (%)	2.9%	0.8%	0.6%	0.6%	1.1%	1.0%	1.3%	0.9%
2005 HHs w/line \$200,000 and Above (%)	2.9%	1.4%	1.1%	0.8%	1.1%	0.9%	1.2%	0.9%
2005 Share of HHs Earning <\$30K	28.9%	44.0%	36.2%	40.9%	39.0%	37.6%	38.1%	39.2%
2005 Share of HHs Earning \$30K+	71.1%	56.0%	63.8%	59.1%	61.0%	62.4%	61.9%	60.8%
2005 Share of HHs Earning \$60K+	41.0%	23.7%	25.9%	24.2%	27.1%	29.5%	28.7%	27.9%
2005 Share of HHs Earning \$100K+	17.4%	7.2%	7.1%	5.6%	8.6%	8.8%	8.2%	8.1%
2010 Households by Income Base	4,176,719	3,503	3,824	10,871	11,456	16,119	25,755	20,706
2010 HHs w/line <\$10000	279,429	355	333	1,087	991	1,375	2,314	1,881
2010 HHs w/line \$10000-14999	169,701	222	209	640	708	1,012	1,412	1,292
2010 HHs w/line \$15000-19999	193,285	291	240	705	779	1,048	1,637	1,403
2010 HHs w/line \$20000-24999	206,190	279	226	822	784	1,016	1,790	1,388
2010 HHs w/line \$25000-29999	211,127	252	239	820	789	1,046	1,767	1,390
2010 HHs w/line \$30000-34999	208,150	237	257	747	757	1,020	1,638	1,347
2010 HHs w/line \$35000-39999	204,340	220	253	695	691	945	1,456	1,252
2010 HHs w/line \$40000-44999	204,134	191	249	664	686	850	1,378	1,101
2010 HHs w/line \$45000-49999	199,169	179	239	600	652	788	1,406	1,050
2010 HHs w/line \$50000-59999	353,029	287	395	996	986	1,489	2,378	1,873
2010 HHs w/line \$60000-74999	458,503	323	433	1,223	1,165	1,903	2,765	2,351
2010 HHs w/line \$75000-99999	497,424	286	338	942	1,026	1,554	2,626	1,926
2010 HHs w/line \$100000-124999	383,614	180	203	484	671	1,007	1,509	1,217
2010 HHs w/line \$125000-149999	241,143	83	101	209	361	540	711	634
2010 HHs w/line \$150000-199999	182,121	44	46	115	204	287	491	334
2010 HHs w/line \$200000-249999	83,016	30	27	61	100	122	231	145
2010 HHs w/line \$250000-499999	77,415	35	29	51	85	98	201	124
2010 HHs w/line \$500000+	24,929	9	7	10	21	19	45	27

Data: ESRI, Inc. 2005
Analysis: Anderson Economic Group, LLC.

TABLE 11. Demographic and Socioeconomic Tables

	Michigan	Schoolcraft County	Alger County	Menominee County	Dickinson County	Delta County	Marquette County	ETA
HOUSING UNITS IN STRUCTURE								
2000 HUs/Units in Struct Base	4,234,279	5,700	5,964	13,639	13,702	19,223	32,877	25,865
2000 HU/Units in Struct: 1-Det	2,988,818	4,729	4,960	10,356	11,101	14,788	22,088	20,081
2000 HU/Units in Struct: 1-Att	164,910	49	29	92	132	110	1,216	165
2000 HU/Units in Struct: 2	146,414	128	77	645	520	954	2,341	1,088
2000 HU/Units in Struct: 3-4	118,067	59	78	202	310	431	1,435	503
2000 HU/Units in Struct: 5-9	169,946	84	52	256	225	293	1,128	413
2000 HU/Units in Struct: 10-19	144,848	2	68	142	265	217	908	234
2000 HU/Units in Struct: 20-49	91,625	90	60	107	205	217	769	314
2000 HU/Units in Struct: 50+	124,948	20	35	195	56	405	584	423
2000 HU/Units in Struct: Mobile	277,158	500	557	1,579	861	1,768	2,333	2,554
2000 HU/Units in Struct: Other	7,545	39	48	65	27	40	75	89
2000 HUs/Units in Struct Base (%)	100%	100%	100%	100%	100%	100%	100%	100%
2000 HU/Units in Struct: 1-Det (%)	70.6%	83.0%	83.2%	75.9%	81.0%	76.9%	67.2%	77.6%
2000 HU/Units in Struct: 1-Att (%)	3.9%	0.9%	0.5%	0.7%	1.0%	0.6%	3.7%	0.6%
2000 HU/Units in Struct: 2 (%)	3.5%	2.2%	1.3%	4.7%	3.8%	5.0%	7.1%	4.2%
2000 HU/Units in Struct: 3-4 (%)	2.8%	1.0%	1.3%	1.5%	2.3%	2.2%	4.4%	1.9%
2000 HU/Units in Struct: 5-9 (%)	4.0%	1.5%	0.9%	1.9%	1.6%	1.5%	3.4%	1.6%
2000 HU/Units in Struct: 10-19 (%)	3.4%	0.0%	1.1%	1.0%	1.9%	1.1%	2.8%	0.9%
2000 HU/Units in Struct: 20-49 (%)	2.2%	1.6%	1.0%	0.8%	1.5%	1.1%	2.3%	1.2%
2000 HU/Units in Struct: 50+ (%)	3.0%	0.4%	0.6%	1.4%	0.4%	2.1%	1.8%	1.6%
2000 HU/Units in Struct: Mobile (%)	6.5%	8.8%	9.3%	11.6%	6.3%	9.2%	7.1%	9.9%
2000 HU/Units in Struct: Other (%)	0.2%	0.7%	0.8%	0.5%	0.2%	0.2%	0.2%	0.3%
2 or more units per structure (%)	18.8%	6.7%	6.2%	11.3%	11.5%	13.1%	21.8%	11.5%
2 to 4 units per structure (%)	6.2%	3.3%	2.6%	6.2%	6.1%	7.2%	11.5%	6.2%

Data: ESRI, Inc. 2003
Analysis: Anderson Economic Group, LLC.

TABLE 12. Demographic and Socioeconomic Tables

YEAR STRUCTURE BUILT	Michigan	Schoolcraft County	Alger County	Menominee County	Dickinson County	Delta County	Marquette County	Marinette County	ETA
2000 HUs by Yr Struct Bt Base	4,234,279	5,700	5,964	13,639	13,702	19,223	32,877	26,260	25,865
2005 HUs by Yr Struct Bt Base	4,451,717	5,917	6,160	14,299	14,003	19,261	33,477	27,592	26,309
2005 Hus/Yr Bt: 3/2000-2005	217,438	217	196	660	301	38	600	1,332	444
2005 HUs/Yr Bt: 1999-3/2000	91,872	153	112	230	142	365	454	659	531
2005 HUs/Yr Bt: 1995-1998	272,594	424	501	718	754	991	1,236	1,819	1,419
2005 HUs/Yr Bt: 1990-1994	259,389	411	405	657	903	953	1,741	1,693	1,369
2005 HUs/Yr Bt: 1980-1989	446,197	716	767	1,459	1,665	2,110	2,908	3,631	2,928
2005 HUs/Yr Bt: 1970-1979	722,799	753	1,070	2,240	1,863	3,499	7,168	5,171	4,529
2005 HUs/Yr Bt: 1960-1969	602,670	590	588	1,422	1,357	1,948	5,136	2,797	2,602
2005 HUs/Yr Bt: 1950-1959	706,799	767	578	1,675	1,318	2,111	3,511	2,797	2,799
2005 HUs/Yr Bt: 1940-1949	416,500	597	713	1,266	1,169	1,683	2,318	1,913	2,303
2005 HUs/Yr Bt: 1939/Before	715,459	1,289	1,230	3,972	4,531	5,563	8,405	5,780	7,385
2005 Median Yr Struct Bt: HUs	1965	1963	1968	1959	1959	1961	1964	1969	1962
2005 HUs by Yr Struct Bt Base (%)	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
2005 Hus/Yr Bt: 3/2000-2005 (%)	4.9%	3.7%	3.2%	4.6%	2.1%	0.2%	1.8%	4.8%	1.7%
2005 HUs/Yr Bt: 1999-3/2000 (%)	2.1%	2.6%	1.8%	1.6%	1.0%	1.9%	1.4%	2.4%	2.0%
2005 HUs/Yr Bt: 1995-1998 (%)	6.1%	7.2%	8.1%	5.0%	5.4%	5.1%	3.7%	6.6%	5.4%
2005 HUs/Yr Bt: 1990-1994 (%)	5.8%	6.9%	6.6%	4.6%	6.4%	4.9%	5.2%	6.1%	5.2%
2005 HUs/Yr Bt: 1980-1989 (%)	10.0%	12.1%	12.5%	10.2%	11.9%	11.0%	8.7%	13.2%	11.1%
2005 HUs/Yr Bt: 1970-1979 (%)	16.2%	12.7%	17.4%	15.7%	13.3%	18.2%	21.4%	18.7%	17.2%
2005 HUs/Yr Bt: 1960-1969 (%)	13.5%	10.0%	9.5%	9.9%	9.7%	10.1%	15.3%	10.1%	9.9%
2005 HUs/Yr Bt: 1950-1959 (%)	15.9%	13.0%	9.4%	11.7%	9.4%	11.0%	10.5%	10.1%	10.6%
2005 HUs/Yr Bt: 1940-1949 (%)	9.4%	10.1%	11.6%	8.9%	8.3%	8.7%	6.9%	6.9%	8.8%
2005 HUs/Yr Bt: 1939/Before (%)	16.1%	21.8%	20.0%	27.8%	32.4%	28.9%	25.1%	20.9%	28.1%
Housing Units Built Since 1990 (%)	14.0%	16.7%	16.5%	11.2%	12.8%	12.0%	10.2%	15.1%	12.6%

Data: ESRI, Inc. 2005
Analysis: Anderson Economic Group, LLC.

TABLE 13. Demographic and Socioeconomic Tables

	Michigan		Schoolcraft County		Alger County		Menominee County		Dickinson County		Delta County		Marquette County		ETA	
OWNER OCCUPIED HOME VALUES																
2000 Median Home Value	\$110,257	\$66,557	\$76,506	\$65,611	\$64,758	\$77,004	\$75,709	\$70,146	\$73,934							
2005 Median Home Value	\$141,049	\$86,233	\$98,592	\$86,395	\$84,983	\$99,733	\$98,746	\$95,725	\$96,188							
2010 Median Home Value	\$179,567	\$107,081	\$120,780	\$108,437	\$108,669	\$124,752	\$126,265	\$120,477	\$120,861							
CAGR 2000-2005 (%)	5.0%	5.3%	5.2%	5.7%	5.6%	5.3%	5.5%	6.4%	5.4%							
CAGR 2005-2010 (%)	4.9%	4.4%	4.1%	4.6%	5.0%	4.6%	5.0%	4.7%	4.7%							
1990 Average Home Value	\$73,927															
2000 Average Home Value	\$137,227	\$88,642	\$94,934	\$78,432	\$85,209	\$93,418	\$88,504	\$85,762	\$90,646							
2005 Average Home Value	\$175,940	\$113,664	\$123,193	\$102,859	\$111,356	\$122,517	\$115,810	\$114,346	\$118,368							
2010 Average Home Value	\$225,638	\$140,377	\$151,990	\$129,620	\$141,682	\$153,820	\$147,884	\$142,335	\$148,372							
CAGR 1990-2000 (%)	6.4%	#NUM!	#NUM!	#NUM!	#NUM!	#NUM!	#NUM!	#NUM!	#NUM!							
CAGR 2000-2005 (%)	5.1%	5.1%	5.3%	5.6%	5.5%	5.6%	5.5%	5.9%	5.5%							
CAGR 2005-2010 (%)	5.1%	4.3%	4.3%	4.7%	4.9%	4.7%	5.0%	4.5%	4.6%							
2005 OOHUs/Value \$49,999 and Below (#)	304,238	703	493	1,956	1,708	1,662	2,745	2,367	2,596							
2005 OOHUs/Value \$50,000 - \$99,999 (#)	588,633	1,059	1,146	3,265	4,024	4,846	6,723	5,440	6,239							
2005 OOHUs/Value \$100,000 - \$149,999 (#)	718,909	566	779	1,923	1,667	3,201	5,198	3,881	3,941							
2005 OOHUs/Value \$150,000 - \$199,999 (#)	542,873	278	409	854	945	1,575	2,068	1,586	1,910							
2005 OOHUs/Value \$200,000 - \$249,999 (#)	329,497	169	179	369	452	853	922	687	1,022							
2005 OOHUs/Value \$250,000 - \$299,999 (#)	155,187	70	54	106	187	283	324	335	339							
2005 OOHUs/Value \$300,000 - \$399,999 (#)	190,566	79	84	121	190	340	379	330	404							
2005 OOHUs/Value \$400,000 - \$499,999 (#)	74,923	21	44	29	69	132	100	57	154							
2005 OOHUs/Value \$500,000 - \$749,999 (#)	57,893	19	19	38	56	52	78	47	70							
2005 OOHUs/Value \$750,000 and Above (#)	34,067	13	13	12	24	19	38	35	32							
2005 OOHUs/Value \$49,999 and Below (%)	10.2%	23.6%	15.3%	22.6%	18.3%	12.8%	14.8%	16.0%	15.5%							
2005 OOHUs/Value \$50,000 - \$99,999 (%)	19.6%	35.6%	35.6%	37.6%	43.2%	37.4%	36.2%	36.8%	37.4%							
2005 OOHUs/Value \$100,000 - \$149,999 (%)	24.0%	19.0%	24.2%	22.2%	17.9%	24.7%	28.0%	26.3%	23.6%							
2005 OOHUs/Value \$150,000 - \$199,999 (%)	18.1%	9.3%	12.7%	9.8%	10.1%	12.1%	11.1%	10.7%	11.4%							
2005 OOHUs/Value \$200,000 - \$249,999 (%)	11.0%	5.7%	5.6%	4.3%	4.8%	6.6%	5.0%	4.7%	6.1%							
2005 OOHUs/Value \$250,000 - \$299,999 (%)	5.2%	2.4%	1.7%	1.2%	2.0%	2.2%	1.7%	2.3%	2.0%							
2005 OOHUs/Value \$300,000 - \$399,999 (%)	6.4%	2.7%	2.6%	1.4%	2.0%	2.6%	2.0%	2.2%	2.4%							
2005 OOHUs/Value \$400,000 - \$499,999 (%)	2.5%	0.7%	1.4%	0.3%	0.7%	1.0%	0.5%	0.4%	0.9%							
2005 OOHUs/Value \$500,000 - \$749,999 (%)	1.9%	0.6%	0.6%	0.4%	0.6%	0.4%	0.4%	0.3%	0.4%							
2005 OOHUs/Value \$750,000 and Above (%)	1.1%	0.4%	0.4%	0.1%	0.3%	0.1%	0.2%	0.2%	0.2%							

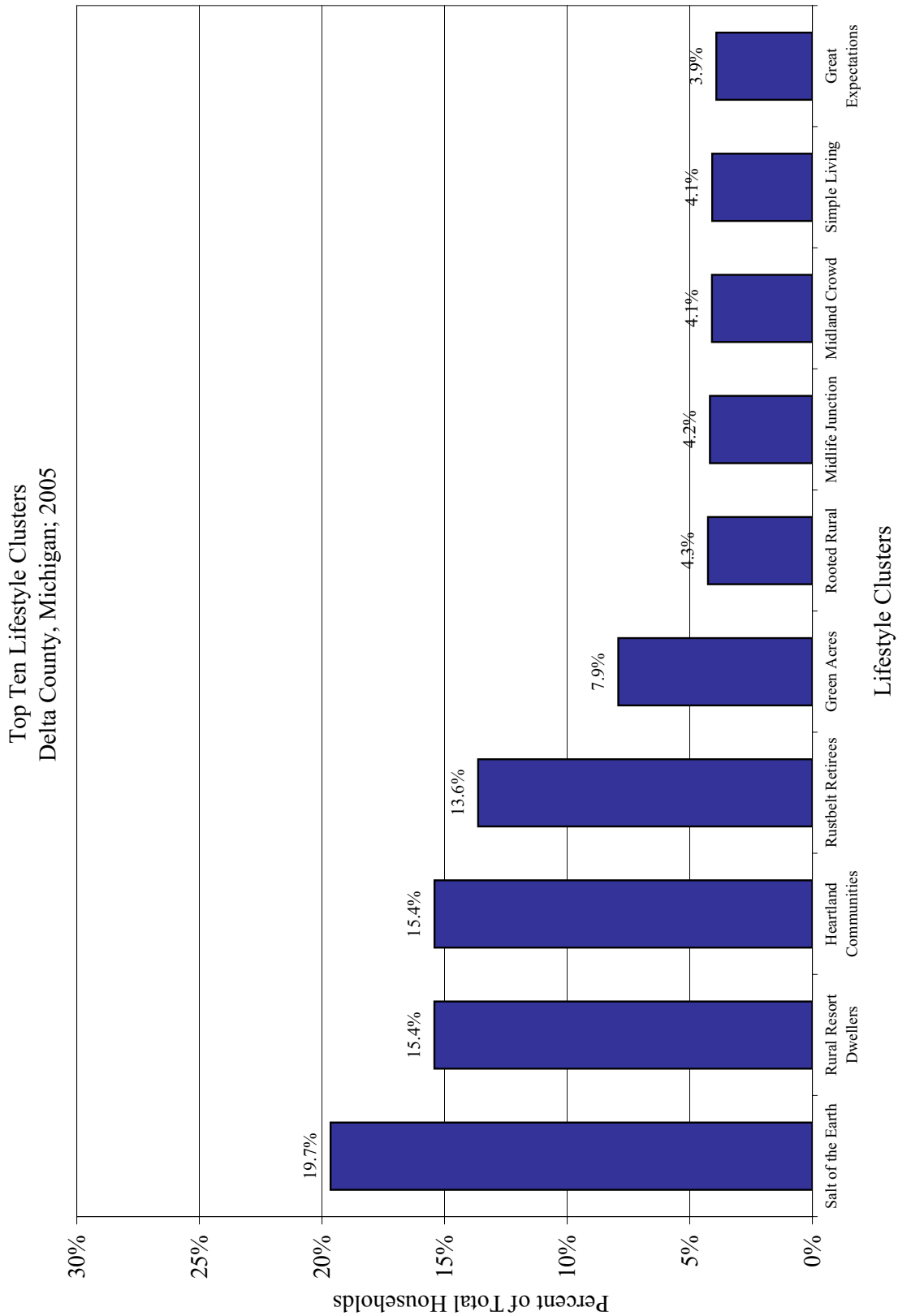
Data: ESRI, Inc. 2005
Analysis: Anderson Economic Group, LLC.

TABLE 14. Demographic and Socioeconomic Tables

	Michigan	Schoolcraft County	Alger County	Menominee County	Dickinson County	Delta County	Marquette County	ETA
AVERAGE CONTRACT RENT								
2000 Median Contract Rent	\$468	\$299	\$317	\$294	\$347	\$323	\$358	\$314
2000 Average Contract Rent	\$494	\$283	\$302	\$290	\$361	\$315	\$360	\$305
2000 Contract Rent: \$199 and Below (#)	73,410	121	107	396	287	504	868	721
2000 Contract Rent: \$200 - \$299 (#)	80,178	165	116	548	526	697	1,540	918
2000 Contract Rent: \$300 - \$399 (#)	175,177	208	171	547	592	1,057	2,105	1,281
2000 Contract Rent: \$400 - \$499 (#)	199,109	43	81	230	429	410	1,635	467
2000 Contract Rent: \$500 - \$599 (#)	162,711	26	23	59	92	144	737	169
2000 Contract Rent: \$600 - \$699 (#)	108,784	2	8	17	19	40	277	40
2000 Contract Rent: \$700 - \$799 (#)	52,574	0	4	7	32	14	51	14
2000 Contract Rent: \$800 - \$999 (#)	47,851	0	0	12	15	11	26	14
2000 Contract Rent: \$1000 - \$1249 (#)	16,823	4	0	0	57	19	32	23
2000 Contract Rent: \$1250 - \$1499 (#)	6,503	0	0	0	0	0	0	0
2000 Contract Rent: \$1500 - \$1999 (#)	6,709	0	0	0	20	0	13	0
2000 Contract Rent: \$2000 and Above (#)	3,718	0	0	1	0	0	0	1
2000 Contract Rent: Base (%)	100%	100%	100%	100%	100%	100%	100%	100%
2000 Contract Rent: \$199 and Below (%)	8%	21%	21%	22%	14%	17%	12%	18%
2000 Contract Rent: \$200 - \$299 (%)	9%	29%	23%	30%	25%	24%	21%	24%
2000 Contract Rent: \$300 - \$399 (%)	19%	37%	34%	30%	29%	36%	29%	31%
2000 Contract Rent: \$400 - \$499 (%)	21%	8%	16%	13%	21%	14%	22%	17%
2000 Contract Rent: \$500 - \$599 (%)	17%	5%	5%	3%	4%	5%	10%	6%
2000 Contract Rent: \$600 - \$699 (%)	12%	0%	2%	1%	1%	1%	4%	2%
2000 Contract Rent: \$700 - \$799 (%)	6%	0%	1%	0%	2%	0%	1%	1%
2000 Contract Rent: \$800 - \$999 (%)	5%	0%	0%	1%	1%	0%	0%	0%
2000 Contract Rent: \$1000 - \$1249 (%)	2%	1%	0%	0%	3%	1%	0%	1%
2000 Contract Rent: \$1250 - \$1499 (%)	1%	0%	0%	0%	0%	0%	0%	0%
2000 Contract Rent: \$1500 - \$1999 (%)	1%	0%	0%	0%	1%	0%	0%	0%
2000 Contract Rent: \$2000 and Above (%)	0%	0%	0%	0%	0%	0%	0%	0%

Data: ESRI, Inc. 2005
Analysis: Anderson Economic Group, LLC.

TABLE 15. Top 10 Lifestyle Cluster Chart



Source: Anderson Economic Group, LLC
 Data provided by US Census with estimates from ESRI, Inc. 2005

TABLE 16. Businesses in Downtown Escanaba (Source: Escanaba DDA)

Business Name	Business Name	Business Name
8th Street Coffeehouse	Delta General Agency	LeCaptain's Costumes & Dance Supply
A Marketplace/Yarn Barn	Delta Vending	Lee's Studio
A-1 Auto Paints & Supplies	Dog House	LeMire Law Office
A-1 Taxes for Less	Don Johnson Insurance	Lighthouse Chiropractic
AJ's Snack Shop	Don Nyquist DDS	Lil's Cards & Gifts
Ameriprise Financial	Donald Lemire	Lion's Den
Anderson Funeral Home	Doran's Dollar Deals	Ludington Auto
Anderson Tackman & Company	Downtowner	Ludington Bait Shop
Apria Health Care	Dream Day Event Center	Luft Insurance Agency
Arnt Asphalt	E & M Enterprises	Marc Blanc Jewelers
Artifice Tattoos	Eagles Hall	
Attitudes Hair Co.	East Ludington Gallery and Gifts	Merle Norman
Auto Value	Economic Development Alliance	Michael J. Manning, P.C.
Baron's Bar	Economopoulos Law Firm PC	Michellene Apparel for Skaters
Basic Marine	Econowash	Miracle Ear Center
Bay Eye Care	Edward Jones	Mix 106 WMXG
Bay Shore Home Nursing	Escanaba Elks #354	Mr. Bike Ski & Fitness
Bear Radio K Rock	Escanaba Steam Laundry	Mueller's Pizza Place
Beautiful Beginnings	Family Eye Care Associates	NCS Hearing Services
Benoit's Glass & Lock	Farm Bureau Insurance-Dan Veese Agency	
Berger & King, Inc.	Ferdinands	New to You
Bertrands	Garceau, Wenick-Kutz, Magowan Insurance Agency	North Central Claim Services
Bill Weissert's Insurance	Garrett Eye Center	Northern Insurance Agency
Bittner Engineering	Gary L. Kivioja CPA PC	Northern Michigan Bank & Trust
Blue Ribbon Taxidermy	Gold Star Bus Line	Northern Motor Co.
Blue Sky Cellular	Grand Day Spa	Northern Screen Printing
Blue Water Divers	Gray Matters	Northern Service Bureau
Bobaloons	Great Lake Fitness	Northern United Federal Credit Union
Bras That Fit	Great Smile Dentistry	Northwestern Mutual Financial Network
Brent's Barber Shop	Green Dragon Comics	Now & Zen
Brian's Auto Glass	Green, Weisse, Rettig, Rademacher, Clark & Bray, P.C.	NuWay Cleaners
Buck's Hair Cutting	Groomingdales & Mammoth Granite	Nyman Jewelers
Butch, Quinn, Rosemurgy, Jardis, Burkhart, Lewandowski & Miller P.C.	Gus Asp	Olsen, Filoramo, McNamara & Soderberg, P.C.
Canterbury Book Store	H & R Block	Pain Diagnostics
Carlyon Dentistry/Bruce Carlyon DDS	Hereford & Hops	Peninsula Financial
Carolyn's Family Salon	Hong Kong Buffet	Peninsula Orthotic & Prosthetic Services
CAT-Man-Do's	House of Ludington	People's Drug Store
Citgo Quick Mart	Hughes & Havinga Insurance	Performance Audio & Restyling
Cleary Buildings	Industrial Sewing	Perk's Cabinetry
Coldwell Banker Pro Realty	Ink Supremacy	Photo Offset Printing
Crafty Corner	Integrity Financial	Pinetree Realty
Crawford & Co.	J & N Taxi	Pioneer TV & Appliance
Crest Financial	Jayne Mackowiak Law Office	Premiere Real Estate Inc.
Curves for Women	Jerry's Body Shop	Quality Electric
D & C Delft	Jim's Music	Quality Sew & Vac
D & M Sub Shop	Johnston's Printing	Radio Results Network
Daily Press/U.P. Action	Joseph Lasnoski DDS MS	Ramido's Sub Shop
Dan Brachman Otis	Just For Her	Ray Payment CPA
Daniel Purcell PBS	K-9 Club & Hot Heads	Raymond James Financial Services Inc.
Daniel Veese Insurance Agency, Inc.	Kathleen Paulson, CPA	Real Estate by George
Davis-Wanic Land Surveyors	K-Dance Express	Record Rack
DeGrand, Reardon & Hall, P.C.	KMB Broadcasting Inc. (WDBC/WYKX)	Reflections Hair Salon
Delta Abstract & Title Agency, Inc.	Knudsen Dentistry, P.L.C.	Reminisce Antique Mall/2nd Chance Teen Shop
Delta Chiropractic Associates, Inc.	Kobas Electric	Renaissance Hair Academy
Delta County Budokan	Lake Superior Business Machines	Richards Printing
Delta County Builders Exchange	Lakeshore Chiropractic	RM Performance
Delta County Cancer Alliance	LaPorte Studios	Rosy's Diner

TABLE 17. Businesses in Downtown Escanaba, Continued (Source: Escanaba DDA)

Business Name	Business Name	Business Name
S & J Trading	T & T True Value Hardware	Treasure Chest
Sault Tribe Health Center	Tackman Capital Management	Tropical Pets
Saykly's Confectionary & Gifts	Talk of the Town	U.P. Academy of Hair Design Inc.
Schneider, Larche, Haapala & Co., PLLC	Tangles & Co.	U.P. Behavior Health
Schooners Café	Tanology	U.P. Mortgage Specialists, Inc.
Schwalbach Kitchens	Tastee Bakery	U.P. Motorsports
Sherwin Williams	Teaching Family Home of Upper Michigan	U.P. Power Co.
Skradski-Boyce Funeral Home	Tebear Sewing Center	U.P. State Bank
Solutions Telecommunications	The Ark/Apple Office Products	U.P. Taxidermy
So's Tailoring	The Asphalt Doctor	Universal Tax Consultants
Spindler Financial Services	The Medicine Shoppe	Vader & Vader Attorneys At Law
St. Vincent De Paul	The Morrison Shop	Veese, Jensen & Kudjala
Stardust Lounge	The Music Tree & Burning Ear Productions	Viau & Chapekis Law
State Wide Real Estate of Escanaba	The Ritz	Victoria Radke
State Farm Insurance	The School Bell	Wells Fargo Bank
Strom & Strom, Attorneys at Law, P.C.	The Stonehouse	Wendy's
Stupak & Bergman, P.C.	The Style Club	Wickert Floral & Greenhouse
SunAmerica Securities	The Total Look	William Bonifas Fine Arts Center
Sunsational Hair	The Upper Cut	Wishful Thinking
Sunsations Tanning	Thomas Pfothenhauer DDS PC	WLUC TV-6
Super Wash	Tim Cain	Woerpel's Imaging and Art Gallery
Supply Sergeant Inc.	To The Pointe Dance & Fitness Center	Young's Formal Wear
Sviland Paint and Wallcoverings, Inc.	Todd's Heating & Cooling	Zambons
Swedish Pantry	Totally Custom Cabinetry	Victorian House and Kitchen Place