



Residential TMA
The City of Monroe
Monroe Co., Michigan
2017

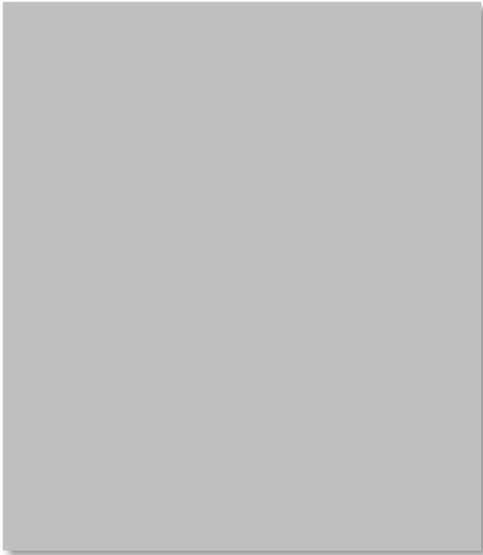
Prepared by:



Southeast Michigan Prosperity Region 9

Prepared for:





Prepared by:



LandUseUSA

Target Market Analysis

The City of Monroe	A
Half Mile Radius	B
The Target Markets	C



Section **A**
The City of Monroe

Prepared by:



LandUseUSA

Southeast Michigan Prosperity Region 9

Prepared for:

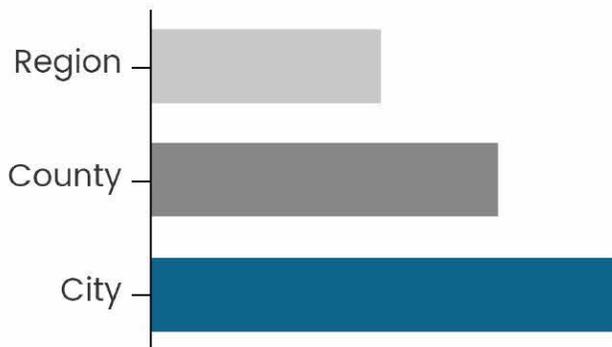


Residential Target Market Analysis

A study of migrating households seeking Missing Middle Housing formats.

Guide to Color-Coded Variables

Variable by Geography

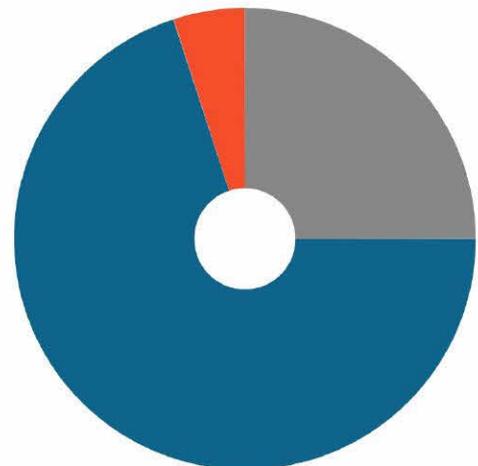


Variable by Gross v. Net



The color codes on each chart are discrete and may vary somewhat between variables and infographics. As a general rule-of-thumb only, blue indicates the most important variable OR geography, and grey indicates secondary variables or geographies. For example, in the first histogram above (left), blue indicates the local city name, which is most important because it is also the primary study area. In the second histogram above (right), net results are considered most important because they have been adjusted for other factors.

In the pie chart to the right, blue indicates renters, who are usually considered most important because they have high movership rates; are inclined to choose attached units (rather than detached houses); are more likely to live in urban places (particularly downtowns); and therefore generate most of the market potential for Missing Middle Housing formats.



Variable by Tenure

● Owners ● Renters ● Vacant



TMA Executive Summary

The City of Monroe, Michigan

Summary of Gross and Net Market Potential

Gross New Households - There are about 240 new households moving into the City of Monroe each year and inclined to choose attached units like duplexes or larger buildings. Of these 240 new households, the vast majority (200, or 83%) are likely to be renters, and only 40 (17%) are likely to be owners. Most of the owners will be inclined to choose detached houses over other formats. These figures are not adjusted for out-migration among existing households moving to other cities.

Net New Renter Households - After adjusting for out-migration, one-third (about 67) of the city's new renters will represent net new households. This is a significant number and suggests a need to add 67 new rental units each year. New units may include conversions from existing space above street-front retail; adaptive reuse of existing structures (such as warehouses and schools); subdivisions of detached houses into duplex or triplex rental units; remodels among some vacant units; plus some new-builds in strategic locations.

Mismatch in Building Sizes - There is a mismatch between the allocation of new household preferences and existing housing stock by building size. About 38% of new households are inclined to choose triplex or larger buildings - but these formats represent only 22% of the existing stock.

Townhouses and Row Houses - This is a need for new choices among moderate-to-better townhouses and row houses in triplex and fourplex buildings. Up to 30 new attached units could be added throughout the city each year in buildings with less than 10 units each. New buildings should be designed as townhouses or row houses with private entrances, plus generous patios, porches, or balconies. They should also be income-integrated, and most will be leased by renters. Some of the need can also be met with rehabbed flats or lofts above retail in downtown Monroe.

Multiplex Buildings - There is also an annual market potential for one larger building with up to 40 units, or two smaller buildings with up to 20 units each. These may be low-rise or mid-rise buildings, and ideally would include generous balconies or patios with vista views of the downtown and/or River Raisin. Alternative locations may overlook the Riverside Marina or any of the city's riverfront parks. Mid-rise buildings are most likely to attract renters rather than owners, and unit sizes should be compact to align with moderate price tolerances.

Rent Tolerance - Most of the new households will have a moderate tolerance for monthly contract (cash) rents. Rent tolerance is usually higher than HUD's conventional standards for "affordability" by income bracket. Even so, there is a profound need for choices that have "attainable" rents for moderate-income households seeking to live in Monroe. Two-thirds of new households will be looking for contract rents of less than \$600, and only one-third will tolerate higher rents. Therefore, most of the new units should also be compact, similar to efficiency units, studios, and micro units.

Home Value Tolerance - The market potential for new owner-occupied units among attached or missing middle housing formats is modest for the City of Monroe. Only 15 net new households are inclined to purchase attached units each year, and most will be seeking prices of \$250,000 or less. Additional owner households could be intercepted if (and only if) new choices are introduced in locations that offer views and glimpses of the river, marina, and waterfront parks.

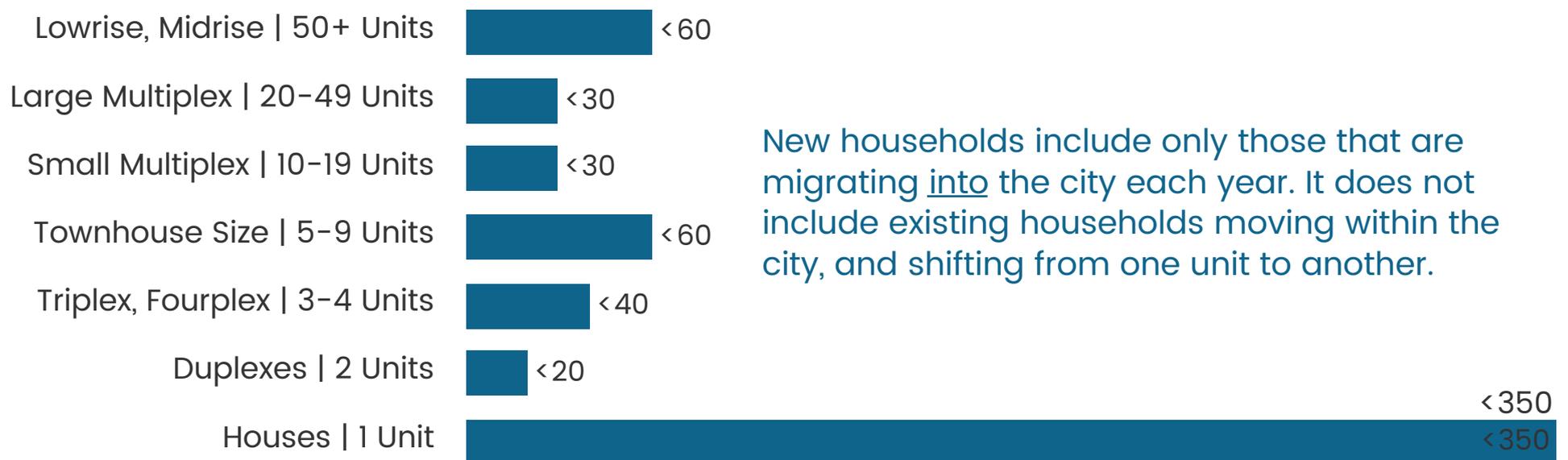


Residential Target Market Analysis

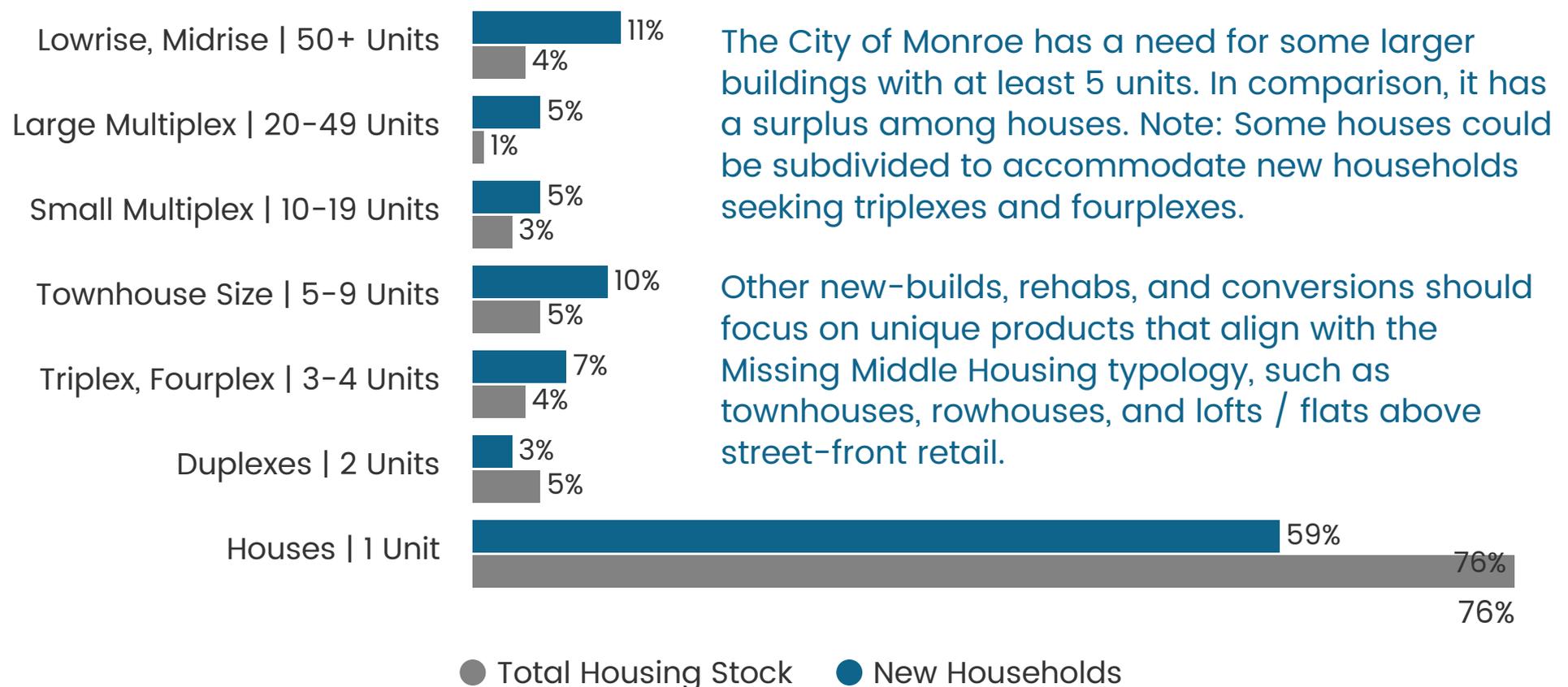
A study of migrating households seeking Missing Middle Housing formats.

The City of Monroe, Michigan

Maximum Annual Number of New Households Seeking Housing Choices by Building Size



Market Potential v. Existing Housing Stock Share of Total by Building Size

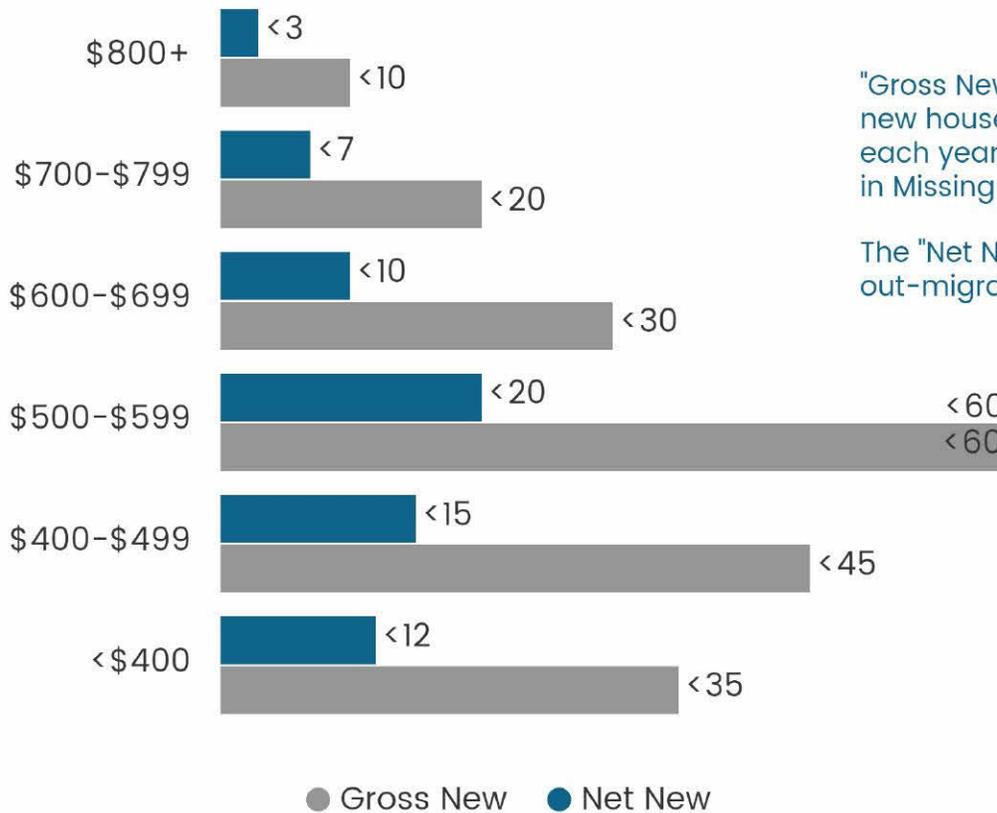


Residential Target Market Analysis

A study of migrating households seeking Missing Middle Housing formats.

The City of Monroe, Michigan

Annual New (Gross and Net) Renter Households Seeking Missing Middle Housing Formats by Contract Rent Bracket



"Gross New" indicates the number of new households moving into the city each year and seeking attached units in Missing Middle Housing formats.

The "Net New" figures are adjusted for out-migration.



City-wide, there are at least 200 new households seeking attached, Missing Middle Housing formats to rent in Monroe each year (unadjusted for out-migration). It is estimated that one-third (33%) of these new households will choose new products if and when they become available. In other words, they support the addition of at least 67 "net new" housing units. The balance of 133 renter households will probably choose existing units that are vacated when others move away, and regardless of the availability among new choices.

Compared to county-wide averages, rental units in the City of Monroe are relatively scarce in the attainable prices of \$600 or less. There is a need to introduce new Missing Middle Housing formats into Downtown Monroe, and particularly small studios units in affordable price brackets.

Most units should offer either views of the downtown street life, and small "river breeze" patios with glimpses of the River Raisin. Locations with vista views of the River Raisin and riverfront parks would be ideal for a few luxury units priced at \$900 per month or more.



Residential Target Market Analysis

A study of migrating households seeking Missing Middle Housing formats.

The City of Monroe, Michigan

Annual New (Gross and Net) Owner Households Seeking Attached, Missing Middle Housing Formats by Home Value Bracket



Chart: "Gross New" indicates the total number of new owner households moving into the city each year and seeking attached and Missing Middle Housing formats to purchase or buy. [Total = 40]

The "Net New" figures are adjusted for out-migration. [Subtotal = 15]

Above: Examples of existing, attached, owner-occupied housing choices in the City of Monroe. Choices are relatively sparse and difficult to find in the city.

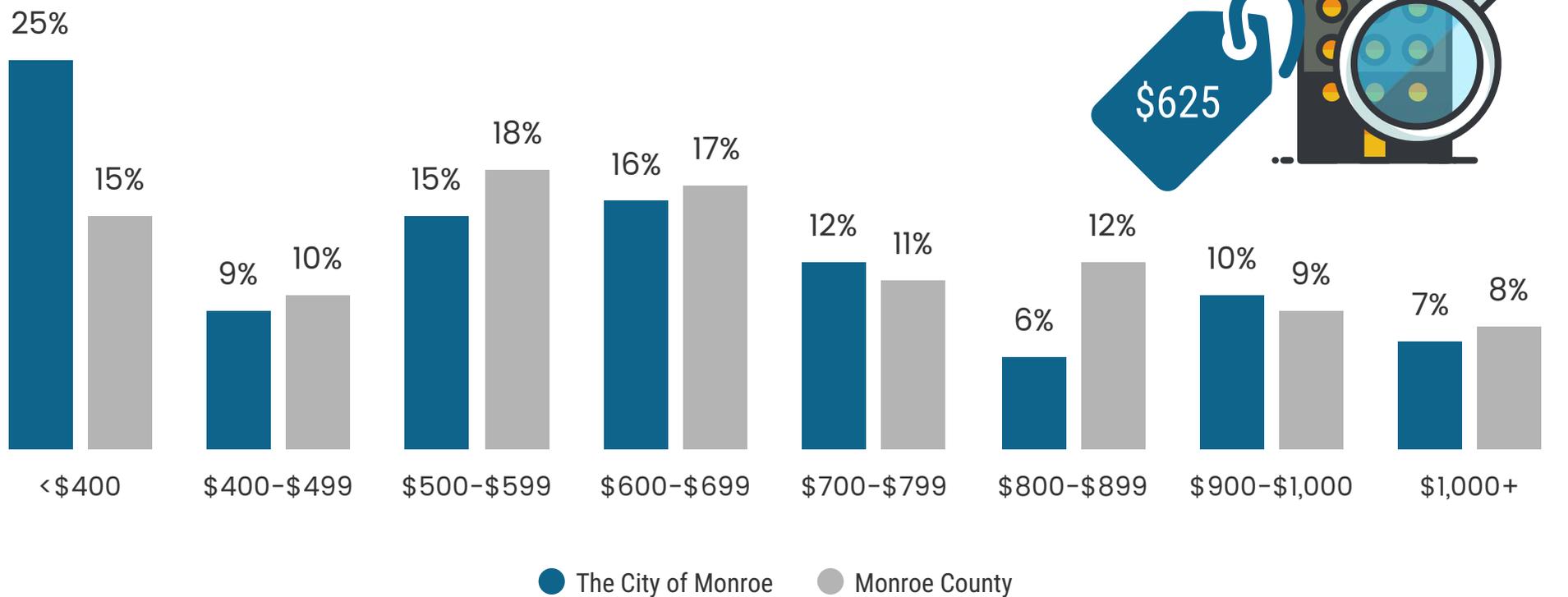
City-wide, there are about 40 new households seeking attached or Missing Middle Housing formats to purchase in Monroe each year (unadjusted for out-migration). It is estimated that about one-third of these new households will choose new products if they are available. In other words, they support the addition of about 15 (fifteen) "net new" housing units. The balance of 25 owner households will probably choose existing units that are vacated when others move away (and with prices of \$100,000 or less), regardless of the availability of newer choices.



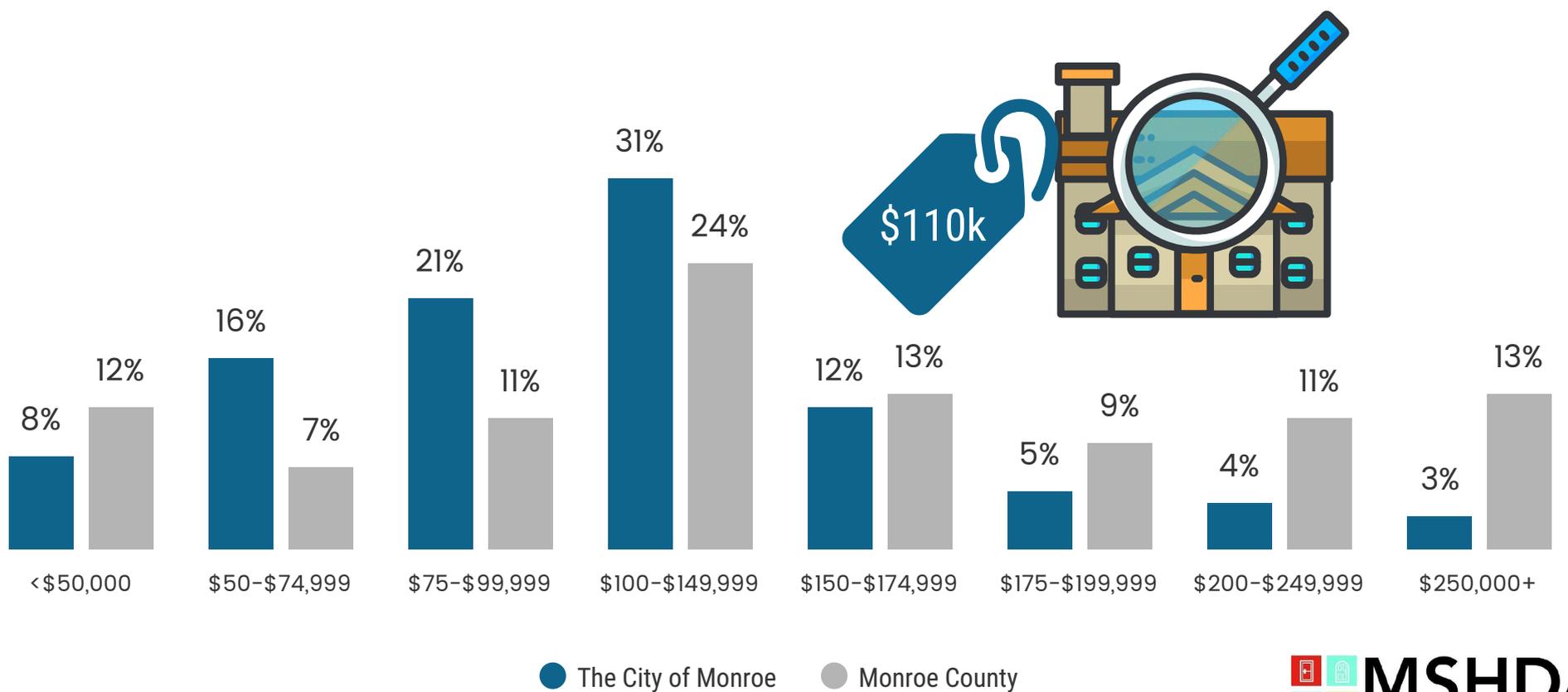
Rent and Value Brackets

The City of Monroe, Michigan

Renter Households by Contract (Cash) Rent Bracket
 Median Monthly Contract Rent = \$625



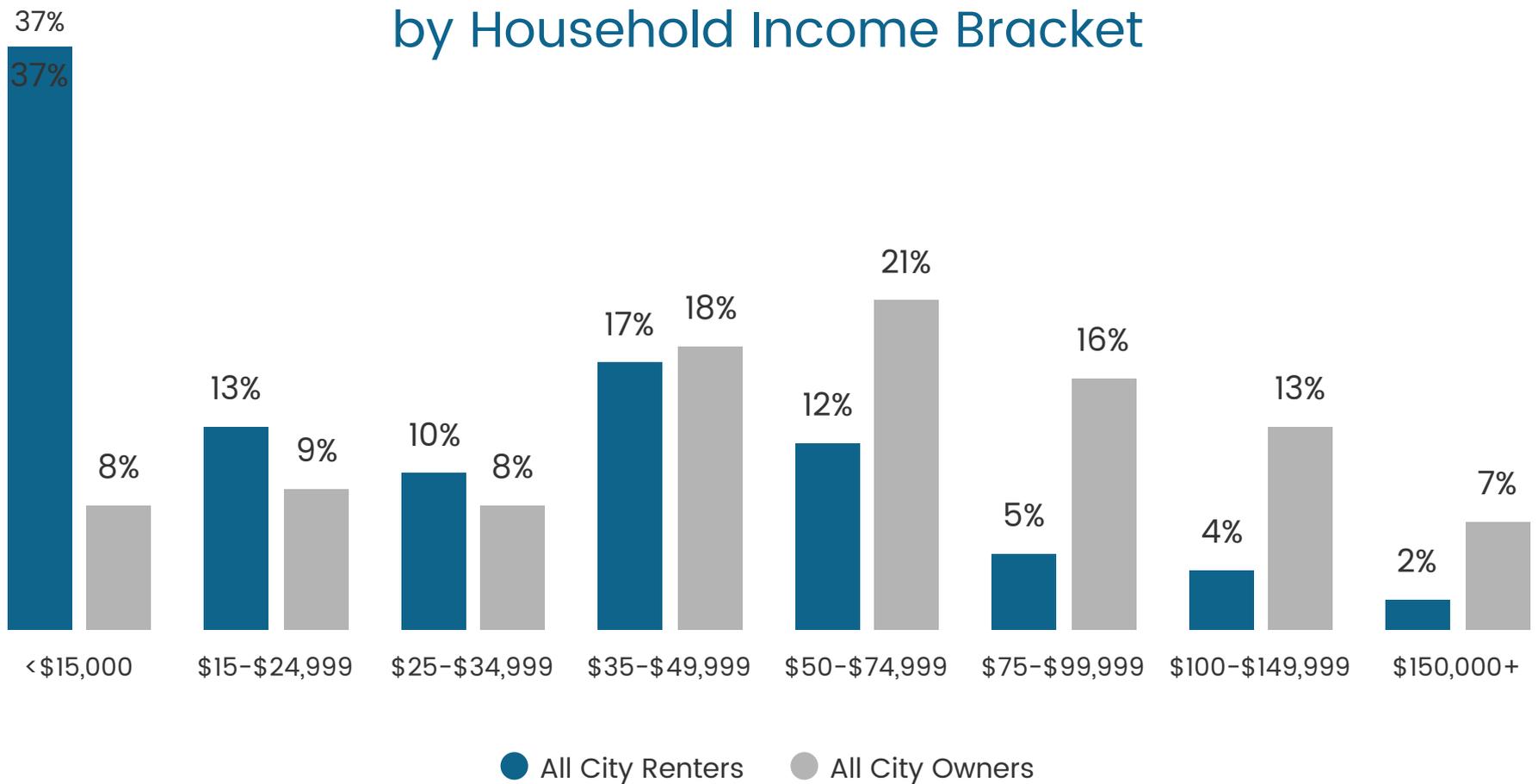
Owner Households by Home Value Bracket
 Median Home Value = \$110,000



Household Tenure and Income

The City of Monroe, Michigan

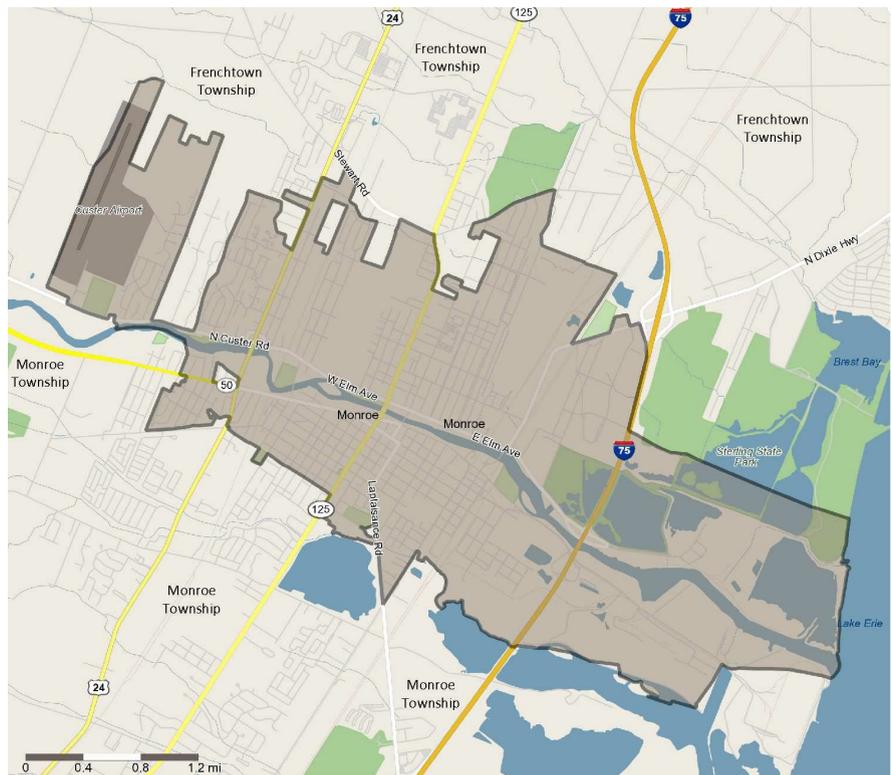
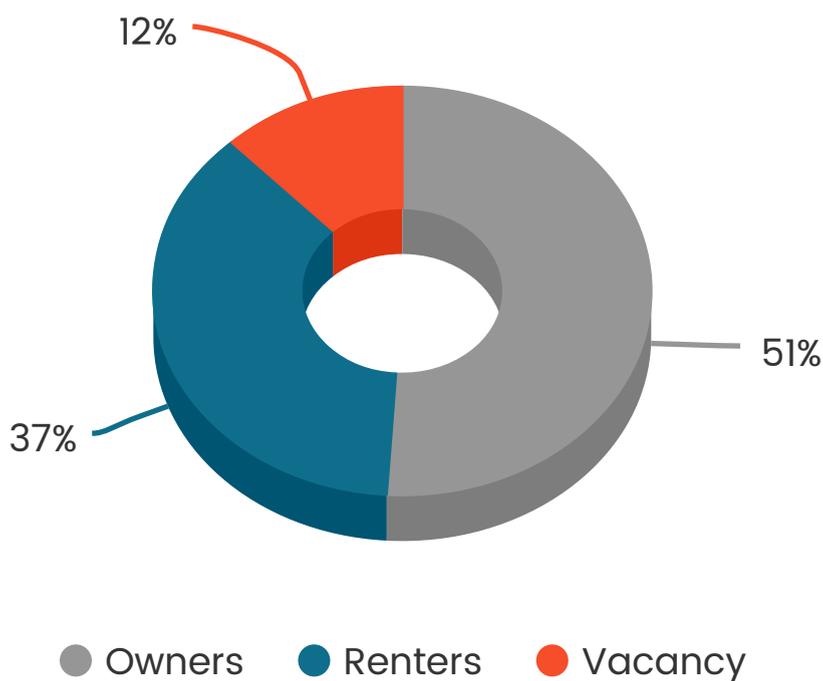
Existing Renter and Owner Households by Household Income Bracket



Median Household Income | Average = \$44,500
 Median Household Income | Renters = \$24,600
 Median Household Income | Owners = \$56,600



Estimated Total Households = 8,100
 Estimated Total Population = 20,600



Locational Considerations

The City of Monroe, Michigan

Locational Preferences of Migrating Target Markets

Locational Preferences - The City of Monroe's location along the River Raisin is one of its most valuable and marketable assets for attracting migrating households and reinvestment. Related assets include the downtown's waterfront location, marinas, and riverfront parks that all help attract residents and seasonal visitors. However, the river is under-capitalized and is not being leveraged to its full potential. Aside from its riverfront parks, Monroe has been falling behind other cities in providing amenities that serve as compelling and competitive destinations.

Meanwhile, new households will be exploring both sides of the River Raisin, and will seek attached housing choices with vista views, glimpses, or even breezes off the waterfront. Views of the downtown, marinas, riverfront parks, and even bridges spanning the river could all be leveraged to attract residents through new housing formats. Significant amenities are also needed to connect both residents and visitors to the riverfront in ways that are interactive, engaging, and social.

Leveraging the riverfront will probably involve significant improvements along Front Street, including the I-75 interchange and west into the the downtown. Fortunately, the city is already developing plans for addressing Front Street, with significant improvements that will be transformative for the waterfront while helping draw visitors from I-75 and into the downtown.



Activated
Riverfronts
(examples)

Convenience to Shopping - Households moving into Monroe will also seek locations that are convenient to shopping, particularly grocery stores, pharmacies, and eateries (including new venues like cafes and brewing companies). They will look for housing choices that are walkable to the downtown, public schools, health care, public transit, playgrounds, and community services. Any locations within three (3) blocks of a waterfront park will be particularly marketable and warrant consideration by developers interested in reinvestment opportunities.

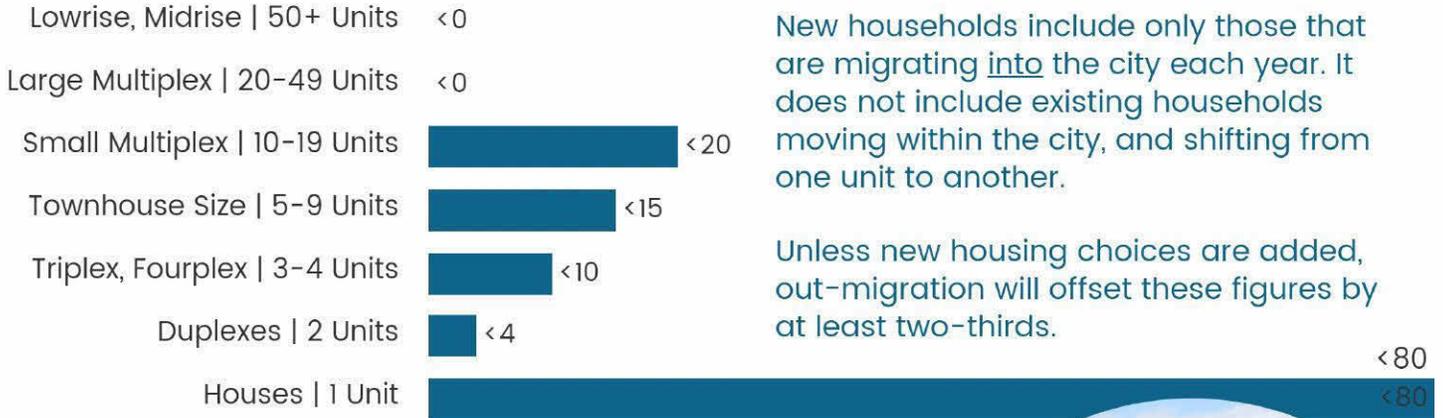


Residential Target Market Analysis

A study of migrating households seeking Missing Middle Housing formats.

Monroe Half-Mile Radius

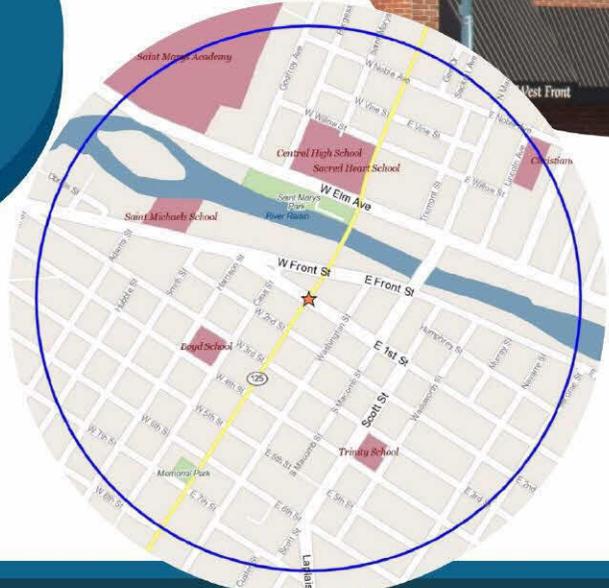
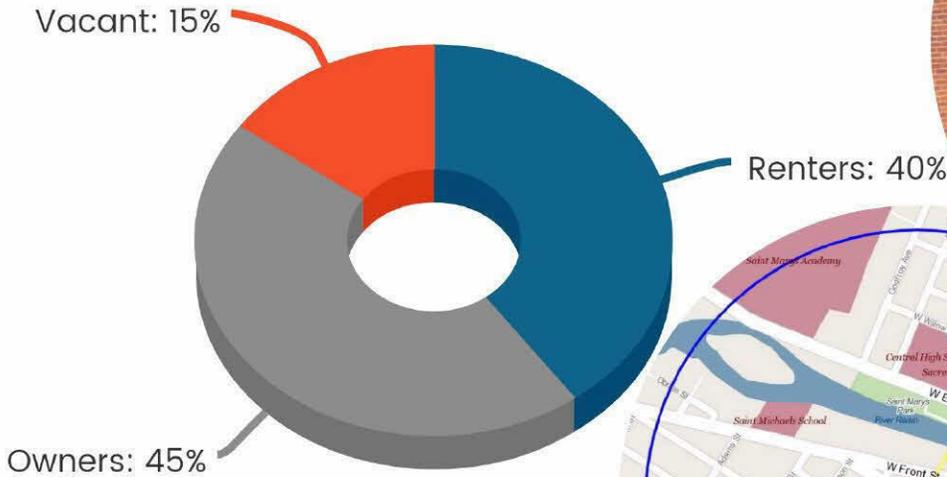
Maximum Annual Number of New Households Seeking Housing Choices by Building Size



New households include only those that are migrating into the city each year. It does not include existing households moving within the city, and shifting from one unit to another.

Unless new housing choices are added, out-migration will offset these figures by at least two-thirds.

Current Occupancy Rates Monroe Half-Mile Radius



Residential Target Market Analysis

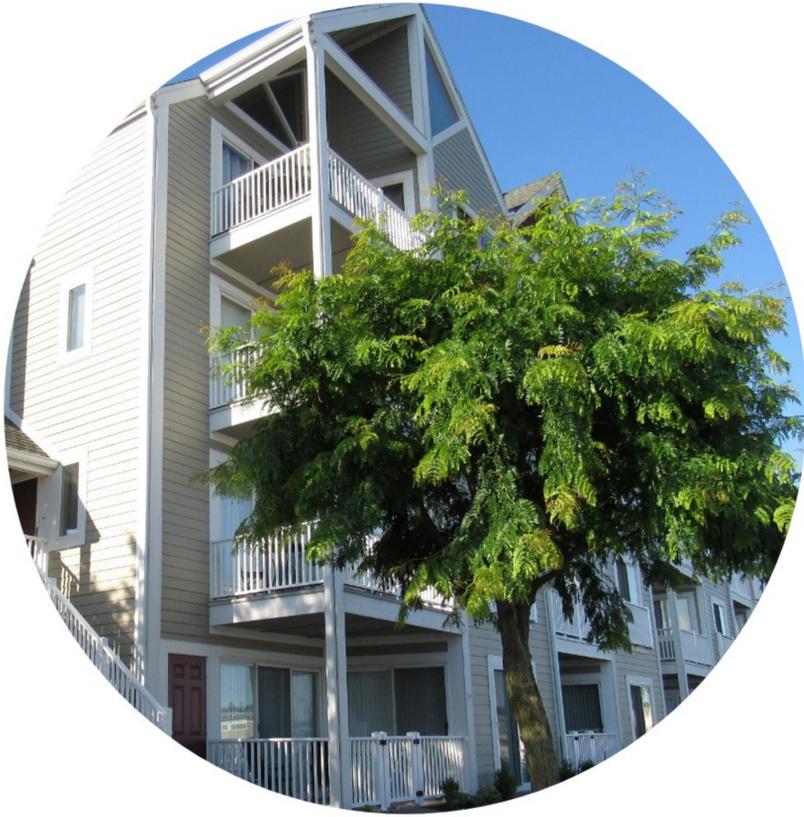
A study of migrating households seeking Missing Middle Housing formats.

The City of Monroe, Michigan

Examples of Existing Rental Choices
Attached Units in Missing Middle Formats



Missing Middle Housing | Waterfront Micro-Units, Boat Houses, Efficiencies, Studios



Optimal Building Amenities

The City of Monroe, Michigan

Optimal Building Amenities

Common v. Private Entrances – Multiplexes may have units that share entrances and that are accessed off of a common corridor. However, units designed as row houses or townhouses (including brownstones) should each have a private entrance.

Shared, Open Parking – Most buildings with shared entrances will have open parking in shared lots. These lots should be placed behind the structures, and not in front. Additional parking should be provided along front and side streets. Each building should also provide some storage in basements or exterior structures that include pavilions for bike racks. About 1.5 parking spaces should be provided for each unit, including guest, visitor, or shared parking. This includes one tenant parking space per unit; plus one extra parking space for every two units.

Private, Detached Garages – All units with private entrances should also have private, attached or detached garages. Garages may be 1.5 capacity (one car, plus storage) for two-bedroom units, and 2.0 capacity (two cars) for three or more bedrooms.

Courtyards, Terraces – New multiplexes should include shared courtyards, terraces, rooftop gardens, or other common areas with open seating, both outdoors and indoors. In mixed-use projects and downtown districts, street-level courtyards should be designed as part of the public realm. In some special cases, pocket parks and town squares can serve as shared courtyards for several buildings.

Other Common Areas – Other common areas may include club houses or party rooms with kitchen rental, fitness centers, and/or swimming pools. Although these are not essential amenities, they can help optimize absorption rates and reduce turn-over among units. For multiplex buildings with micro-units, small guest rooms could be made available for-lease and available to tenants to reserve on a nightly basis.

Bungalow Courts, Cottages – If developers decide to develop new, detached units, they are encouraged to consider bungalow courts or cottage-style houses that face onto a shared courtyard or terraced green. Houses are usually small, with a kitchen, living room, bedroom, and bathroom on the main level, and a mezzanine loft in the rafters.

Carriage Style Formats – Flats or lofts above garages are often referred to as carriage-style units. In zoning nomenclature, they may also be referred to as Accessory Dwelling Units (ADU), ancillary units, or secondary suites. Accessory dwelling units can also include basement apartments; secondary suites attached to the main dwelling through breezeways; and detached cottages behind the main dwelling.

Building Scale – When attached units are developed as row houses, four-plexes, or townhomes, they should have distinct façade articulations with no more than six (6) private entrances, porches, or balconies along any one side of each building. Some mid-rise and larger multiplex buildings could have back-to-back units, with no more than 12 units on any given level.

Other buildings could include combinations of one-level and split-level lofts and townhouses that are stacked in any combination. Again, stacked lofts should have no more than 6 units along any building side. Large-plex buildings with 7, 8, or more units along any single side should be avoided. However, two buildings with 6 units each could be developed side-by-side and in a row.



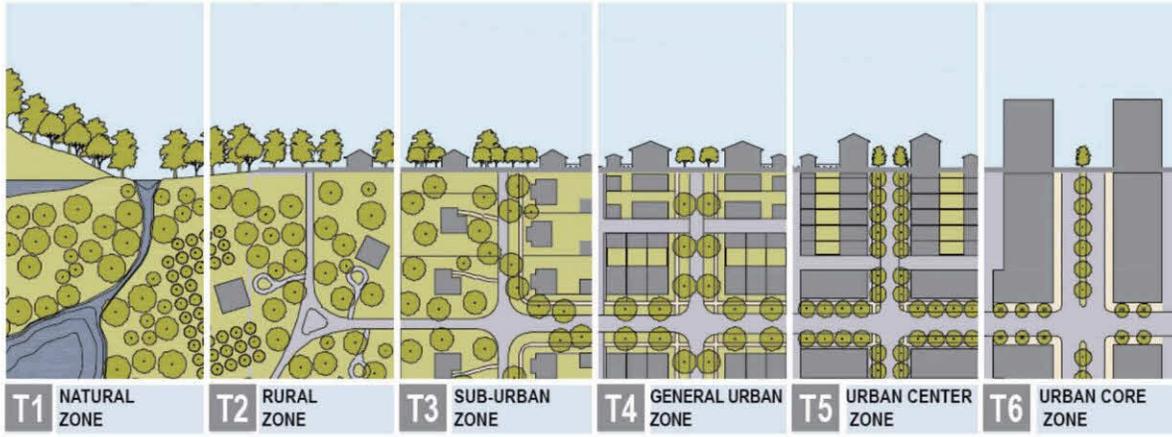
The Urban Transect

A comparison of Missing Middle Housing typology and the Urban Transect.

Below: The Urban Transect

Source: Duany Plater-Zyberk

Source (Below):
Center for Applied
Transect Studies



Below: Missing Middle Housing

Source: Dan Parolek and Opticos Design Group



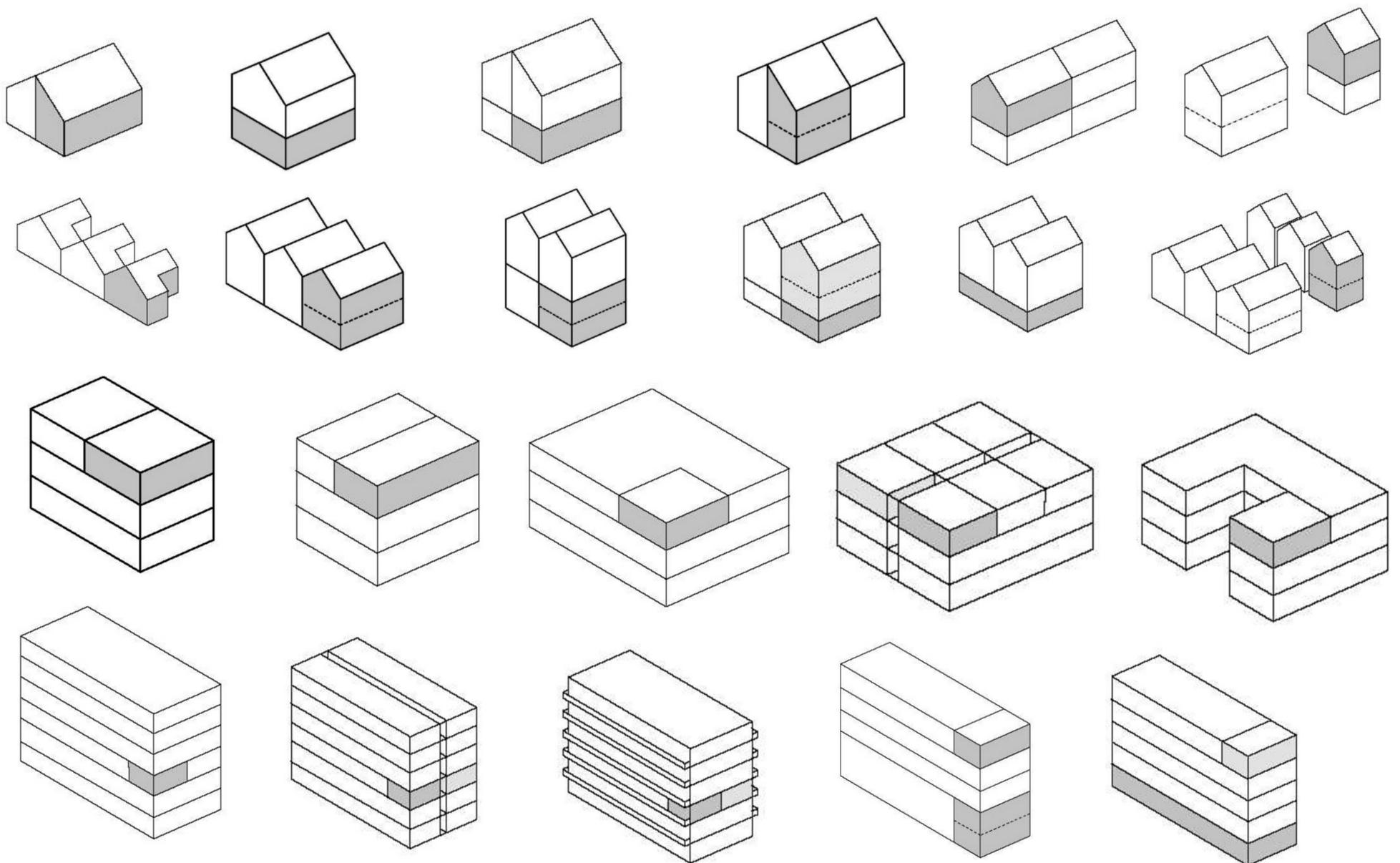
Missing Middle Housing

A typology of urban building formats that migrating households are seeking.



Above: Missing Middle Housing | Urban Infill and Transition

Source: Dan Parolek and Opticos Design Group



Above: Building Blocks for
Subdivided Houses, Townhouses, and Low-Rises



Optimal Unit Amenities

The City of Monroe, Michigan

Optimal Unit Amenities

Number of Bedrooms - Attached units should be designed for renters of all ages and incomes, including a diverse group of single householders; two or more generations (singles with children, siblings, and aging parents); unrelated roommates (including unmarried couples); and some married couples. To meet the needs of these diverse groups, two-bedroom units should have the bedrooms placed on opposite sides of the kitchen and common areas (i.e., they should not share common walls). Each bedroom should have its own full private bath, and a ½ guest bath should be located next to the main entrance.

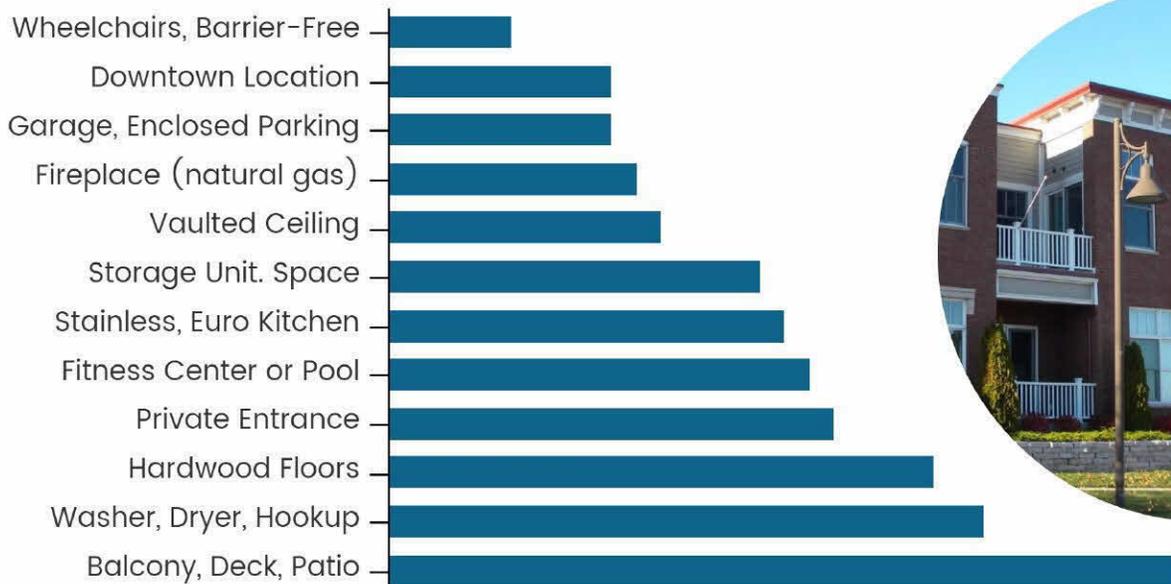
Balconies, Patios - In buildings with shared entrances, all two-bedroom units should have balconies or patios that can accommodate at least two chairs and a small end table. Kitchens and common areas should serve as buffers for units with two bedrooms. Kitchens should be centrally located and facing outward onto common areas (i.e., living rooms), and with clear sight-lines to patio doors or bay windows. Row houses and townhouses with private entrances must each have a generous porch (i.e., not just a stoop) that can accommodate a comfortable sitting area.

Micro-Units - One-bedroom, studio, and efficiency units may have less than 600 square feet, and should have open floor plans with movable walls. Some micro-units could be tested with 350 to 450 square feet. Micro units do not necessarily need to have balconies or patios. However, building amenities should be bolstered to include spacious common areas both indoors and outdoors.

Live-Work Units - Live-Work units are specially designed for living and operating a business out of the same unit. Usually the front of the lower level is for the business; the rear of the lower level is a garage and stairwell; and the upper level is the proprietor's private residence. Live-work units could also be flats and lofts where residents are permitted to operate home-based businesses at the front. Proprietors typically reside in an apartment behind the business and share a parking lot with patrons. On-street parking in front of live-work units should be reserved exclusively for patrons.

Competitive Marketing Strategies

Advertised Unit Amenities | East Michigan



CENTER FOR APPLIED TRANSECT STUDIES



Missing
Middle
Housing
Formats





Carriage-Style
Accessory
Dwelling
Units



Cottage
Courtyard





Duplexes
Triplexes
Fourplexes



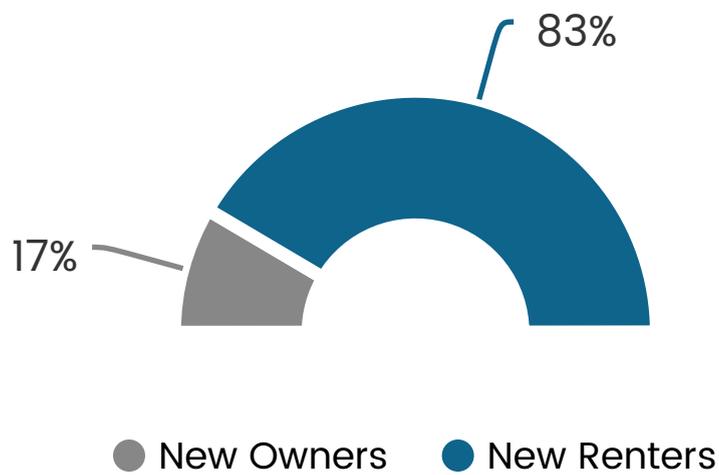
Residential Target Market Analysis

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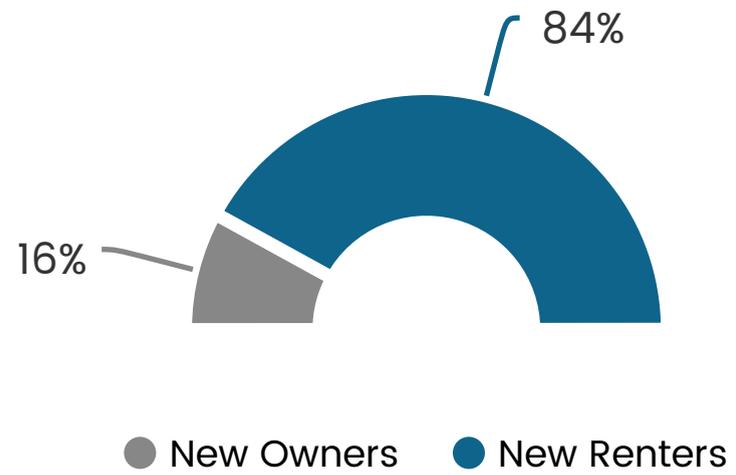
The City of Monroe, Michigan

Share of New Households by Tenure
Owners and Renters

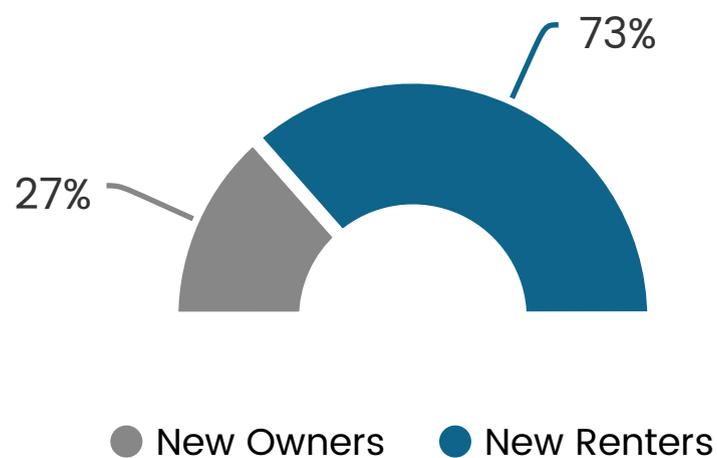
The State of Michigan



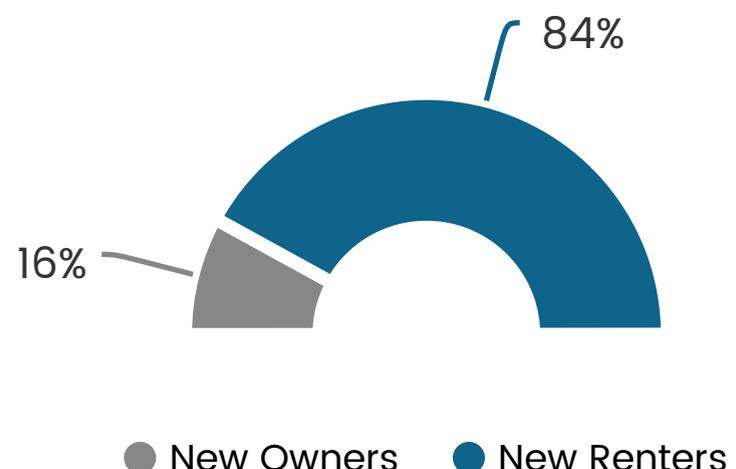
SEM Region 9



Monroe County



The City of Monroe



For the City of Monroe, 84% of new households migrating into the city are renters, and 16% are owners. The share of renters is higher than averages for the county, but similar to averages for the Southeast Michigan Prosperity Region 9.

As a side note, 58% of all existing households living in the City of Monroe are owners and 42% are renters. However, renters are much more transient and unsettled, and they have higher movership rates.



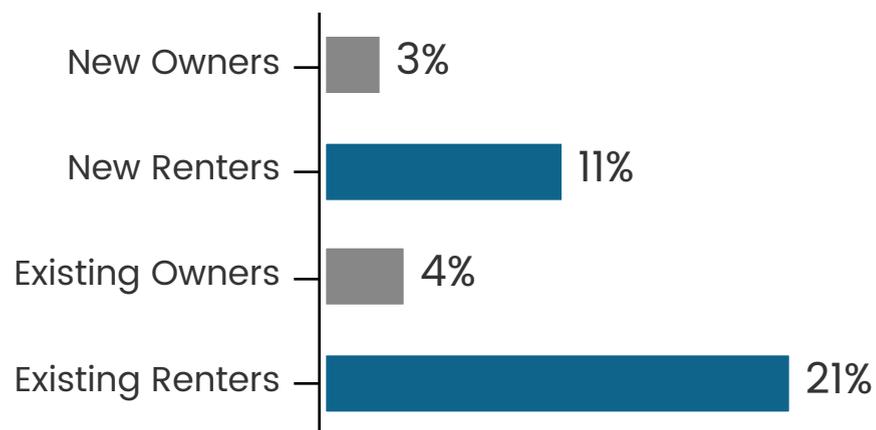
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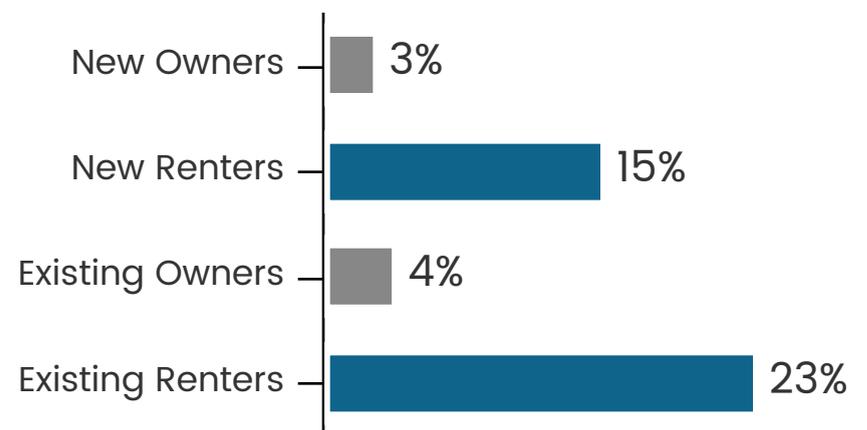
The City of Monroe, Michigan

Annual Movership Rates
Among New and Existing Owners and Renters

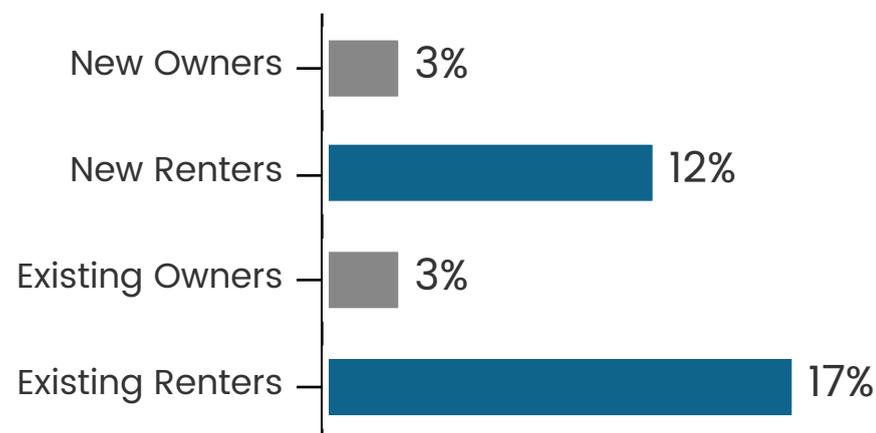
The State of Michigan



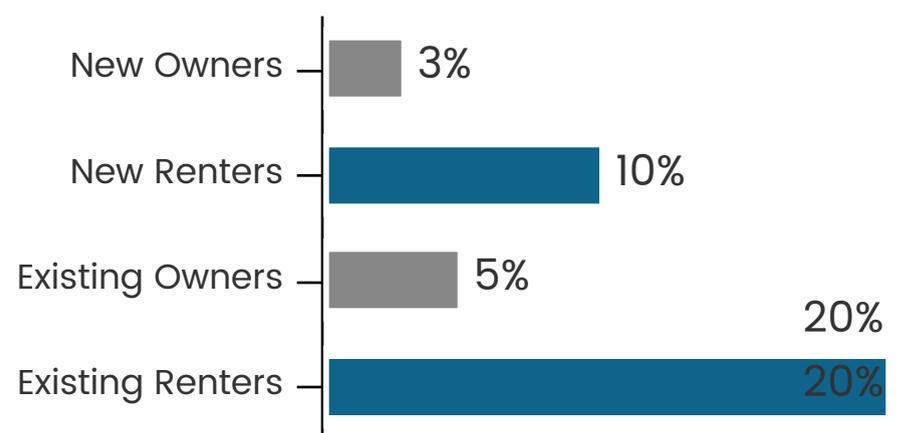
SEM Region 9



Monroe County



The City of Monroe



For the City of Monroe, 10 percent of all households are new renters migrating into the city each year, and 3% are new owners. The renter movership rate is a little lower than county averages, which indicates some need (and opportunity) for the city to attract more renters.

In comparison, internal movership within the city is surpassing averages for the county, suggesting that existing households are relatively less settled.

Note: Exceptionally high movership rates (15%) among new renters in Region 9 can be partially attributed to the "Colleges and Cafes" target market, which is migrating toward Ann Arbor and Ypsilanti.

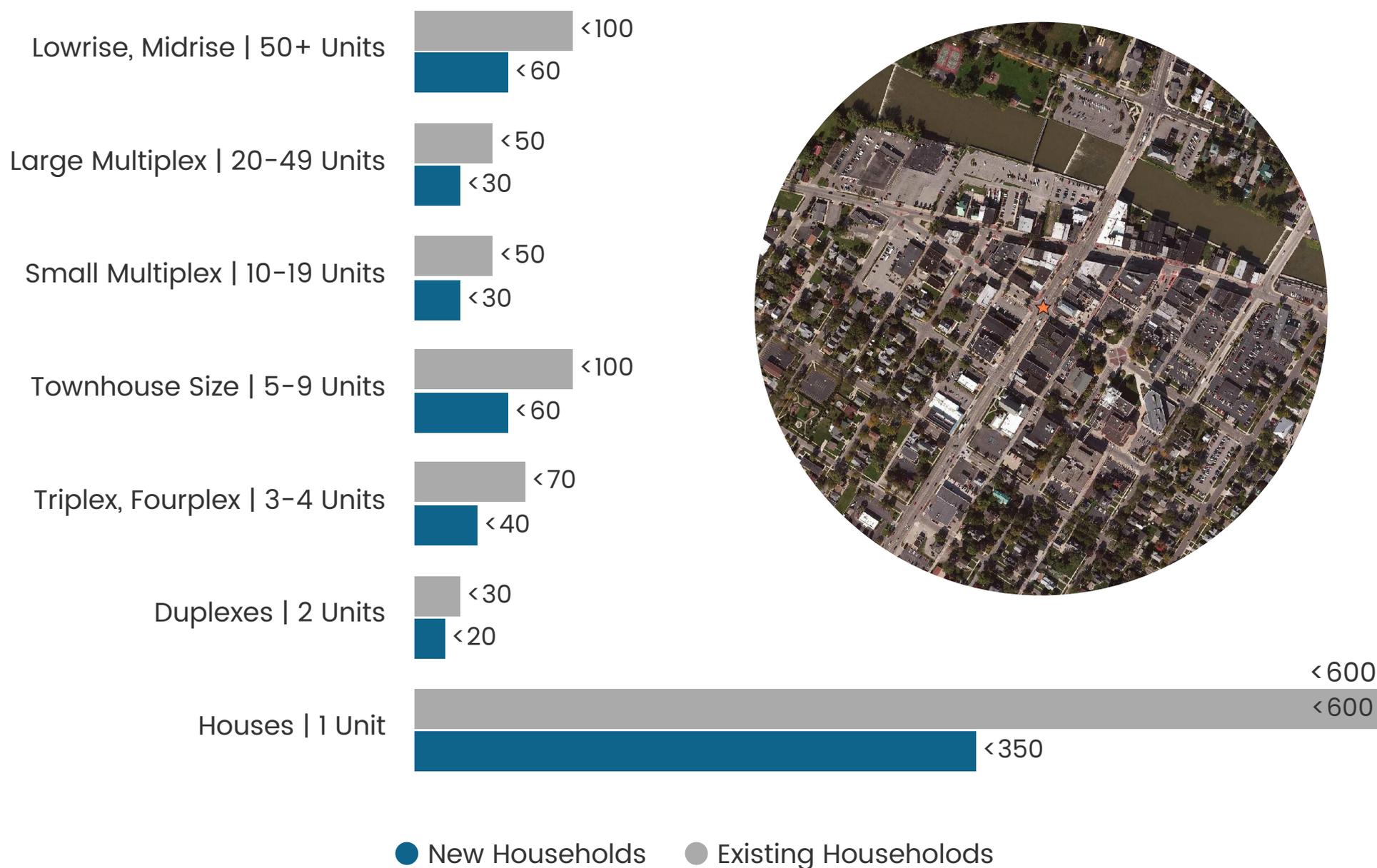


Residential Target Market Analysis

A study of migrating households seeking Missing Middle Housing formats.

The City of Monroe, Michigan

Annual Number of New and Existing Households Seeking Housing Choices by Building Size



New households include only those that are migrating into the city each year. Existing households are already city residents, but are also moving from one address to another, and for any number of reasons. New residents tend to be upwardly mobile with the means and resources needed to move from one city to another. They may be attracted by jobs, educational opportunities, family, recreational resources, and other quality-of-life considerations.

Existing residents moving within the city are more likely to be responding to internal market pressures. They are often motivated by contract (net or cash) rents; utility costs; apartment conditions; and proximity to public transit, churches, health care, shopping, city parks, public schools, and other services.



TMA Advisory Report

The City of Monroe, Michigan

Next-Steps for the City of Monroe

The City of Monroe's leadership and consulting team should share results of the Target Market Analysis with stakeholders through a variety of methods. The complete report and an abbreviated version should both be retrievable on the city's website. LandUseUSA will facilitate two study groups that are scheduled for the evening of June 5th (a special session with city council) and the morning of June 6th (a special session for prospective investors). Additional study groups and developer forums may be facilitated upon request.

Copies of the abbreviated report should be shared and discussed among the city's planning staff and prospective developers. A printed copy should also be provided to every city council member and planning commissioner. Key recommendations should be integrated or reflected in the city's next master plan update. The city should also write a media release for local newspapers, and media should also be invited to attend the study group and any subsequent developer forums.

LandUseUSA will provide the complete TMA report to key staff at the Michigan State Housing Development Authority (MSHDA), and the Michigan Economic Development Corporation's (MEDC) Community Development Division. Any questions regarding this report and study can be addressed to Sharon Woods at (517) 290-5531 or sharonwoods@landuseusa.com. Any questions regarding community development and planning in the City of Monroe can be addressed to Jeffrey Green, Director of Community Development, jeffrey.green@monroemi.gov or 734-384-9106.

Next-Steps for Private Developers

Private developers, investors, property owners, and lending institutions are encouraged to attend the TMA Study Group (see dates above); and should also attend any subsequent developer forums. They should strive to add new units that align with the Missing Middle Housing typology, and that are unique to the City of Monroe. They should read the entire TMA report and then contact Sharon Woods with any questions.

When pursuing Missing Middle Housing formats, developers should avoid labeling projects as "multi-family", "worker", "low-income", or "subsidized" housing. Instead, projects should be envisioned, designed, and advertised based on their form and function. This will appeal to migrating target markets, optimize the market potential, and encourage socio-economic diversity within the city. Recommended terms are also listed below.

Use | Residential; mixed-use; live-work; and above retail, civic, and/or office space.

Tenure | For-lease, for-sale, or lease-to-own.

Scale | Building height, footprint, number of levels, total units, units along building sides.

Form | Mansion-style houses, including new-builds designed as four-plexes or smaller.

Form | Cottages arranged around shared courtyards, accessory dwelling units.

Form | Townhouses, row houses, multiplex, low-rise, live-work, and flats/lofts above retail.

Location | Downtown, riverfront, transitional locations, infill locations, etc.

Disclaimers | This Target Market Analysis is not a substitute for a site-specific studies and pro-forma analyses, which are essential for underwriting purposes and to qualify for loans, grants, tax rebates, or other incentive programs. Each new project's success will depend on a wide variety of site-specific attributes, including location, building placement, adjacent uses, visibility, access and egress, project amenities, management, and marketing. Although MSHDA endorses and supports the work approach followed by this TMA study, developers who follow these recommendations are by no means assured of any MSDHA financial or technical assistance.





Section **B**

Half Mile Radius

Prepared by:



LandUseUSA

Southeast Michigan Prosperity Region 9

Prepared for:

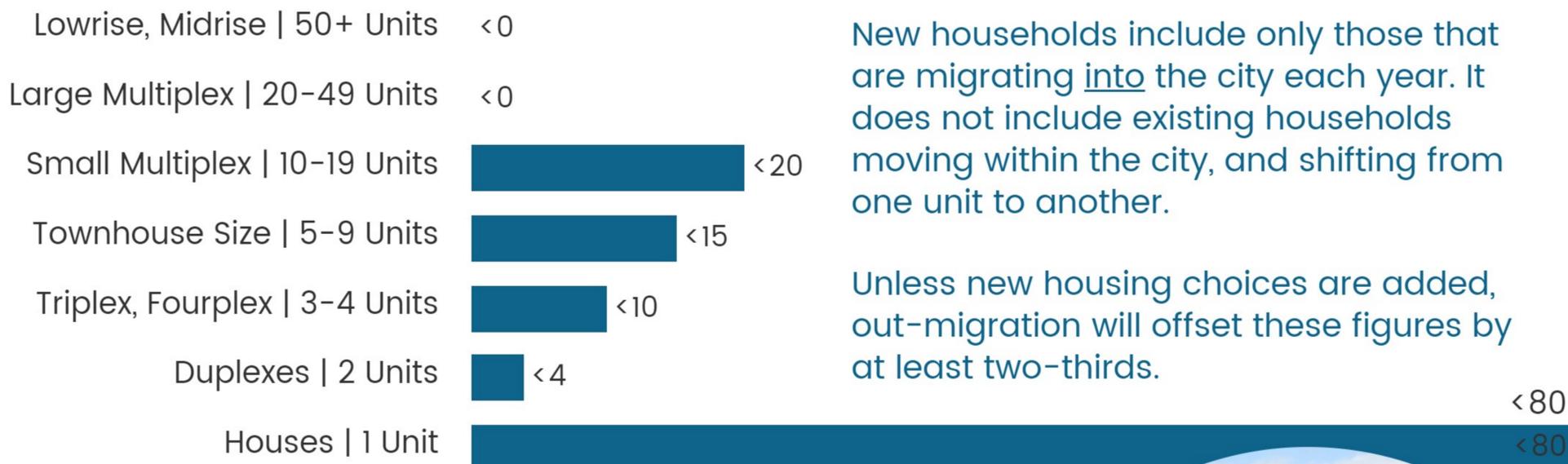



Residential Target Market Analysis

A study of migrating households seeking Missing Middle Housing formats.

Monroe Half-Mile Radius

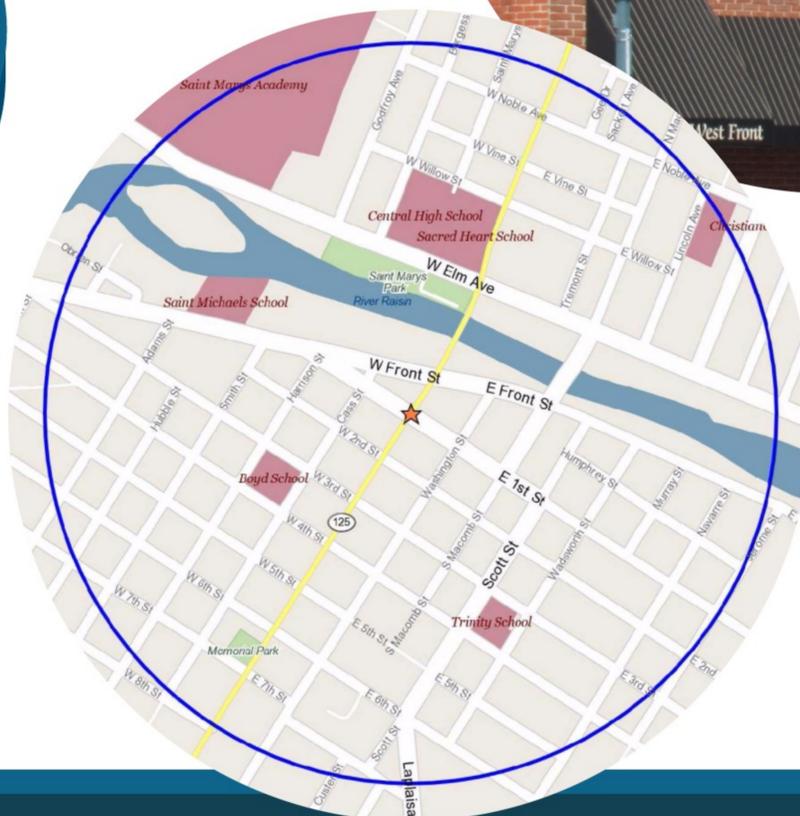
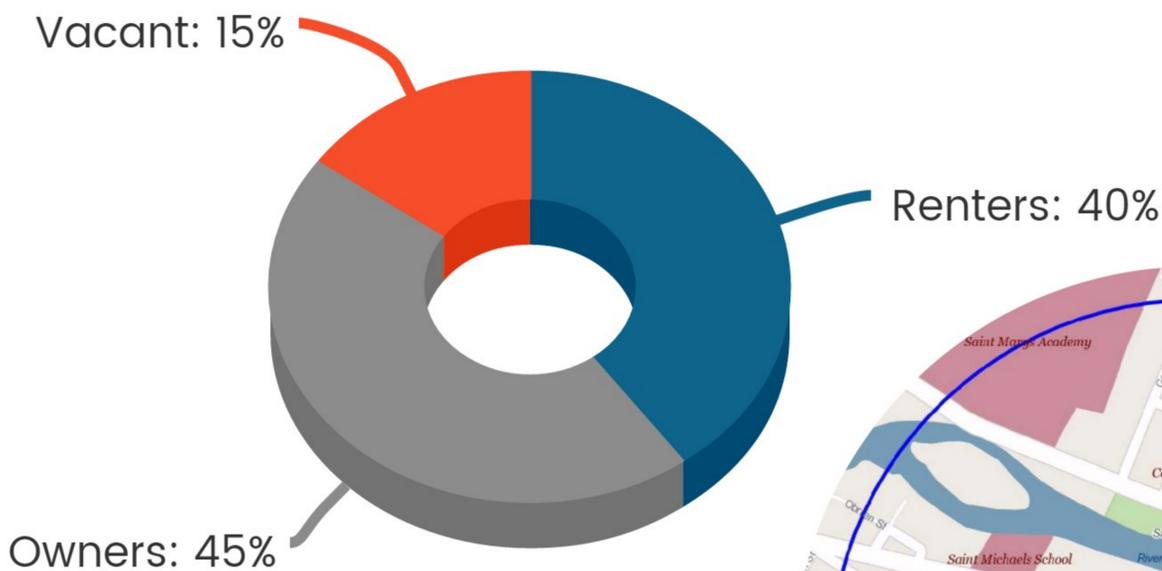
Maximum Annual Number of New Households Seeking Housing Choices by Building Size



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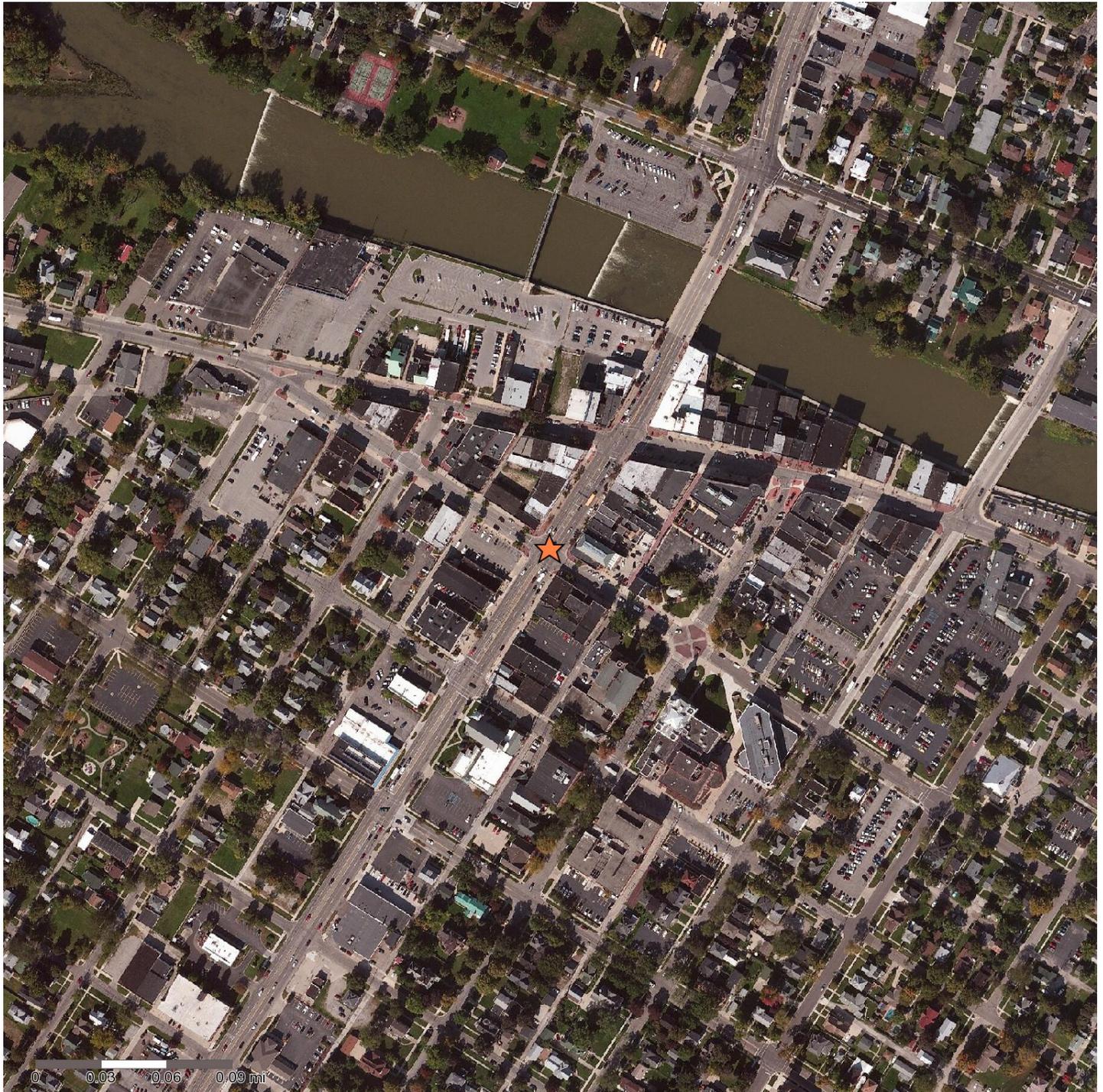
Unless new housing choices are added, out-migration will offset these figures by at least two-thirds.

Current Occupancy Rates Monroe Half-Mile Radius



Street Grid, Water Features, and Building Mass Downtown Monroe | Monroe Co., Michigan

Exhibit B.1



**Source: Underlying aerial licensed by DigitalGlobe and powered by Alteryx;
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Section **C**
The Target Markets

Prepared by:



LandUseUSA

Southeast Michigan Prosperity Region 9

Prepared for:



City of Monroe
Monroe, Michigan
Incorporated in 1837
Home

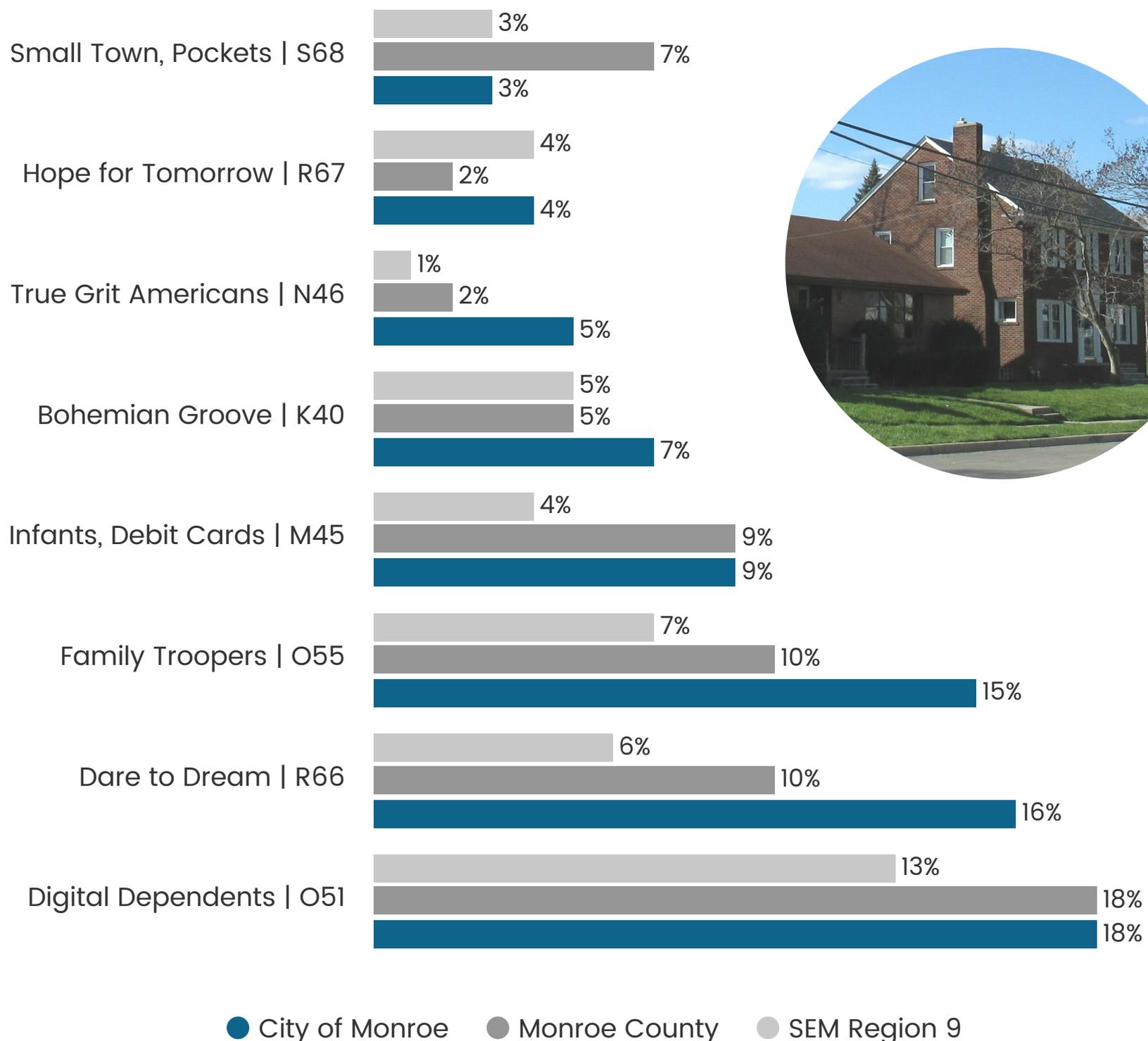
MSHDA
MICHIGAN STATE HOUSING
DEVELOPMENT AUTHORITY

Residential Target Market Analysis

A study of migrating households seeking Missing Middle Housing formats.

The City of Monroe, Michigan

Share of New Households by Target Market Seeking Houses, Duplexes, and Triplexes



In the City of Monroe, "Digital Dependent" target market represent 18% of all new (in-migrating) households that are seeking Houses, Duplexes, and Triplexes. In addition, 16% of the new households seeking these formats are "Dare to Dream"; and 15% are "Family Troopers".

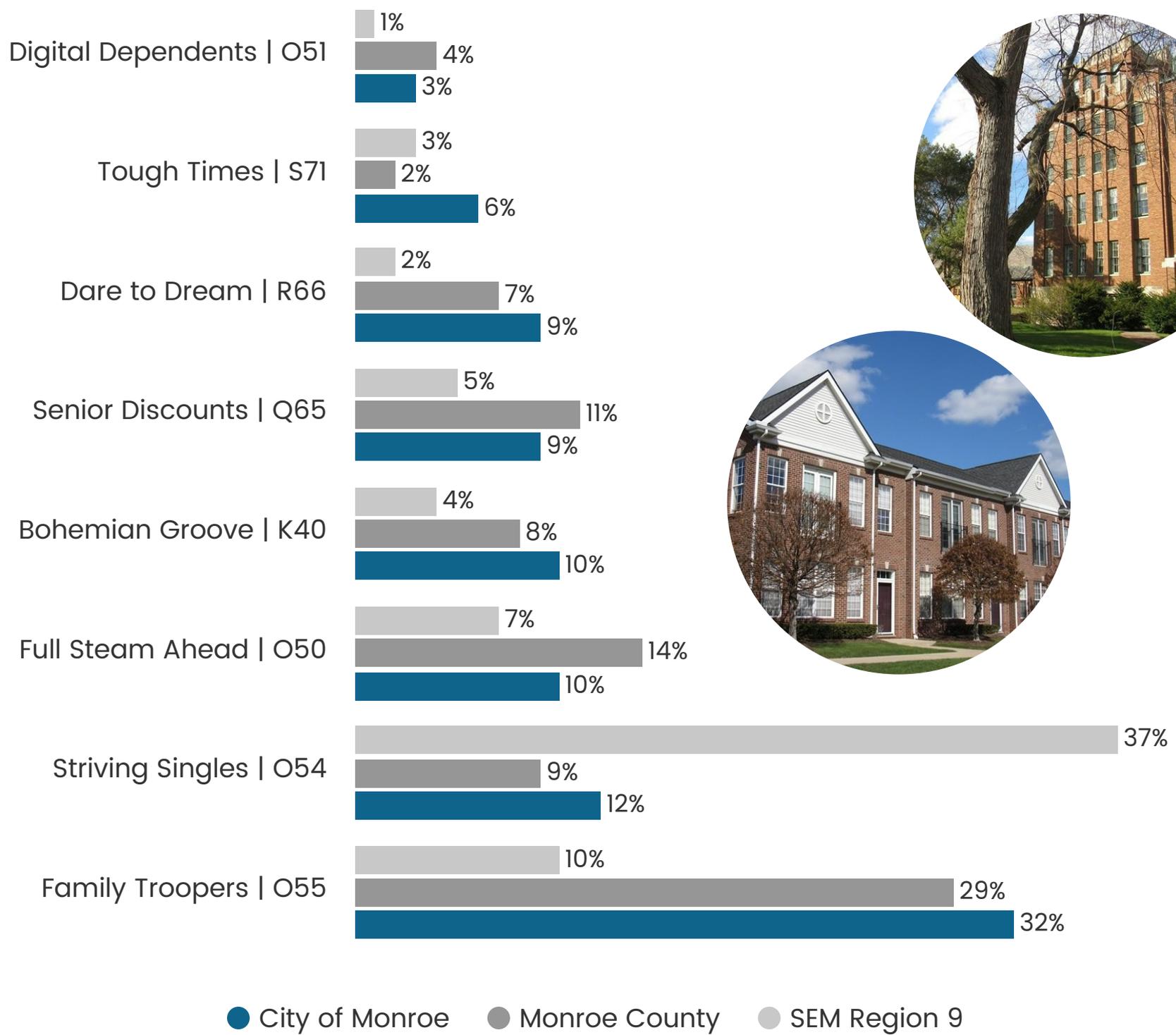


Residential Target Market Analysis

A study of migrating households seeking Missing Middle Housing formats.

The City of Monroe, Michigan

Share of New Households by Target Market Seeking Structures with at Least 4 Units



In the City of Monroe, the "Family Troopers" target market represent 32% of new (in-migrating) households that are seeking Structures with at least 4 units. In addition, 12% of the new households seeking these formats are "Striving Singles". For the region, the "Striving Single" households represent 37% of new households, and it is safe to assume that many are migrating into the City of Ann Arbor.

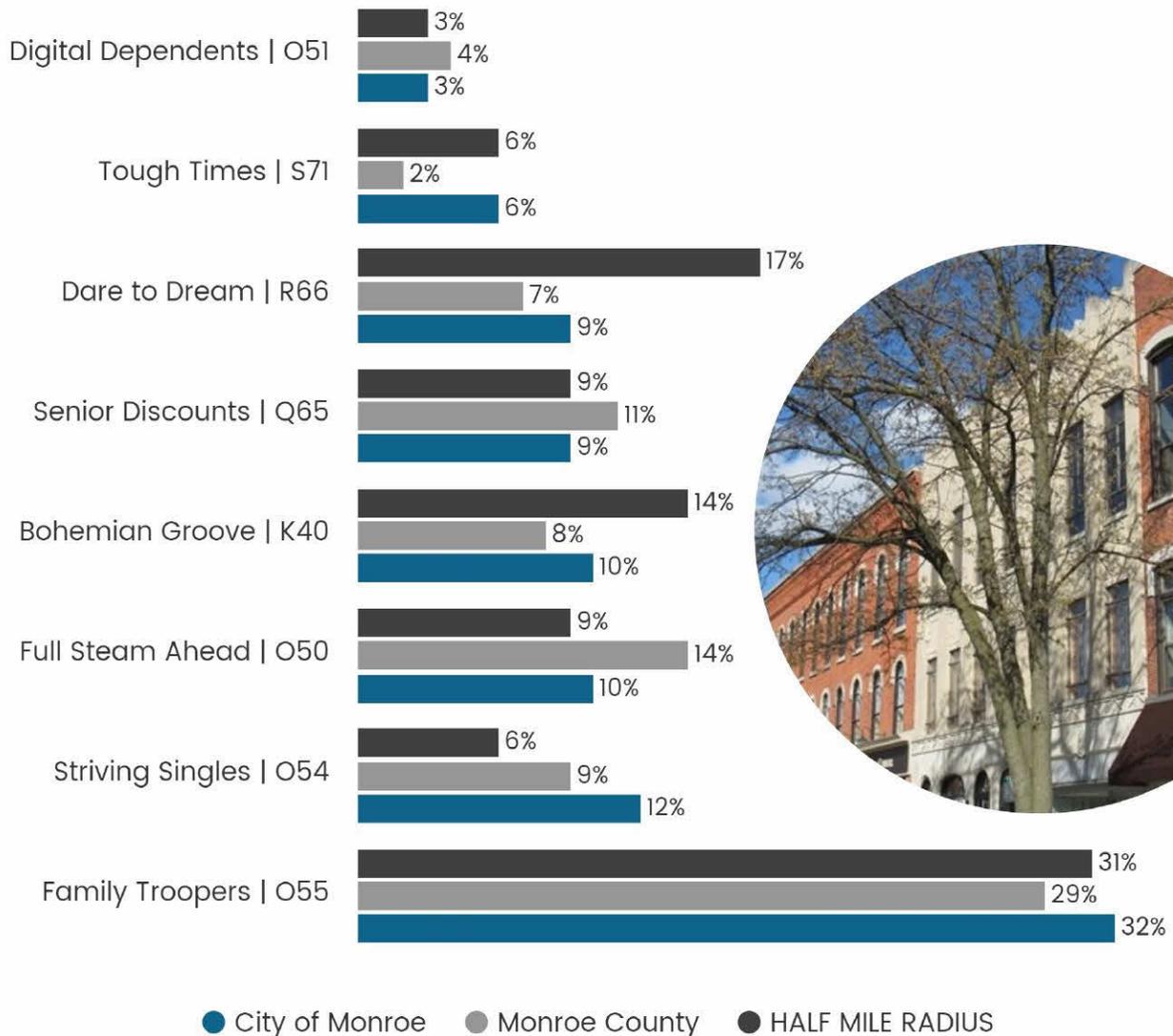


Residential Target Market Analysis

A study of migrating households seeking Missing Middle Housing formats.

Monroe Half-Mile Radius

Share of New Households by Target Market Seeking Structures with at Least 4 Units



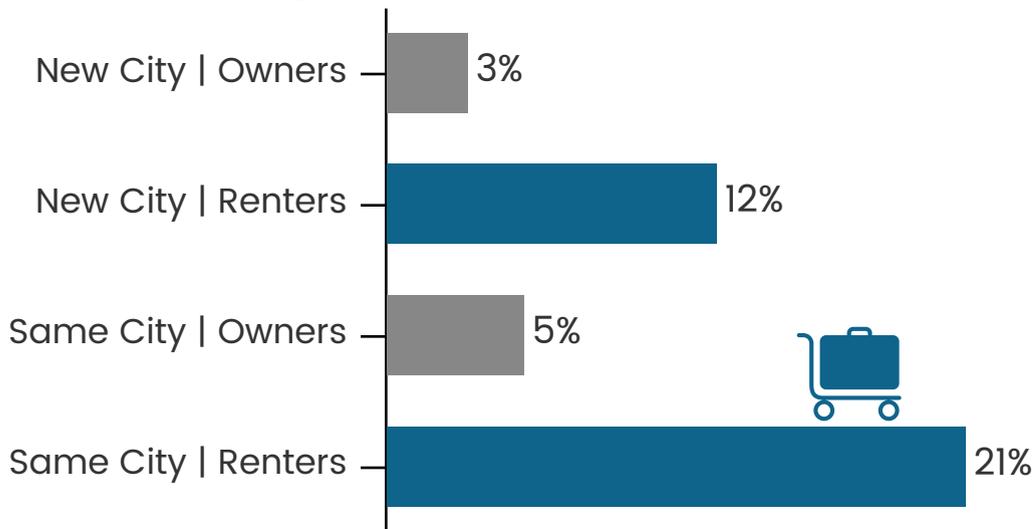
Within a half mile of downtown Monroe, the "Family Troopers" target market represent 32% of new (in-migrating) households that are seeking structures with at least 4 units. In addition, 17% of the new households seeking these formats are "Dare to Dream"; 14% are "Bohemian Groove"; 9% are "Full Steam Ahead"; and 9% are "Senior Discounts". In comparison, the downtown is not attracting its fair share of "Striving Singles" when compared to city-wide average.



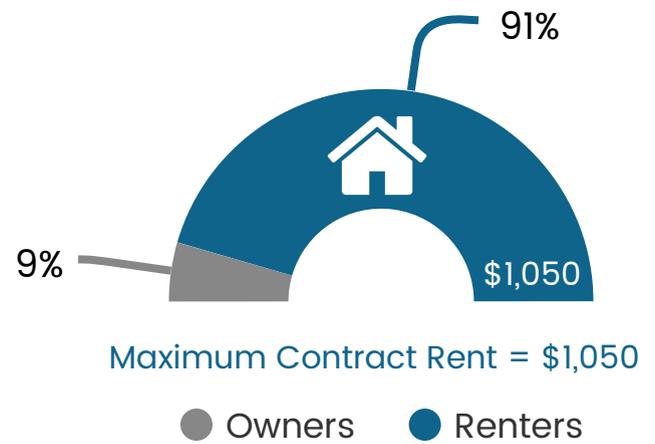
Bohemian Groove | K40

Lifestyles and Housing Preferences | National Averages

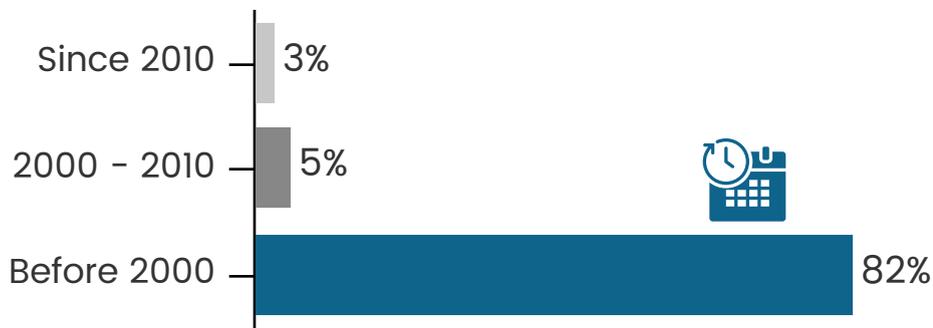
Average Annual Movership Rates



Average Tenure



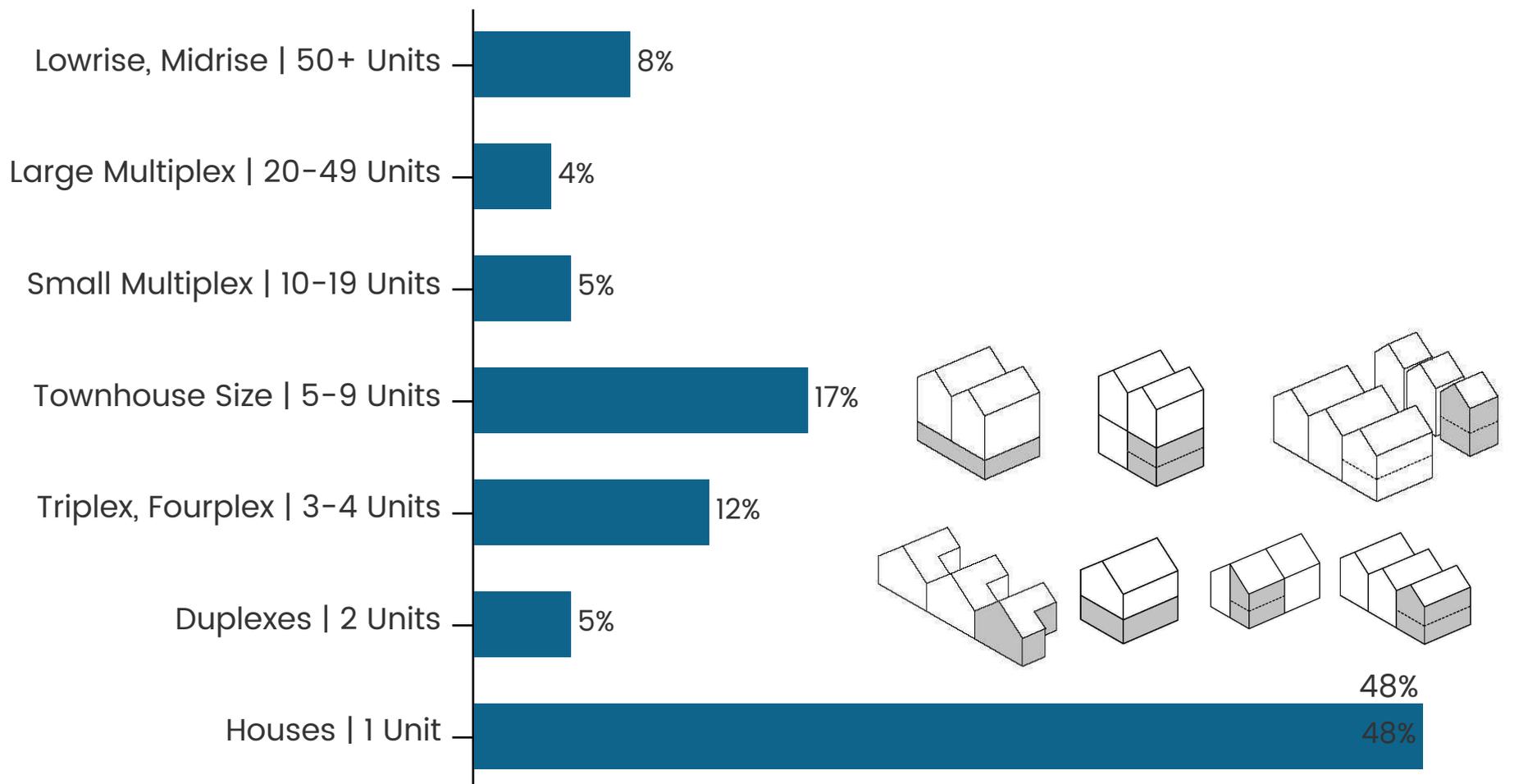
Inclination for Units by Decade Built



Median Household Income



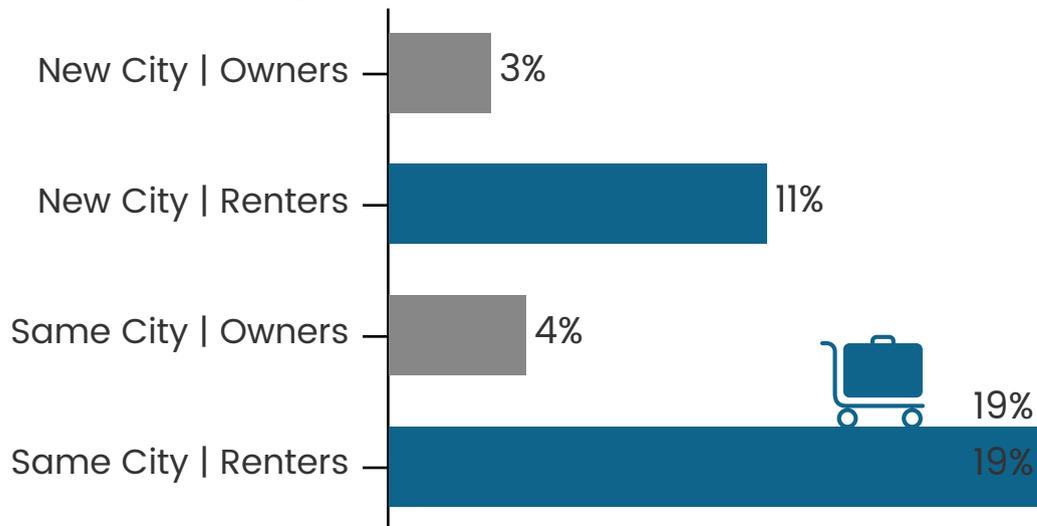
Inclination for Units by Building Size



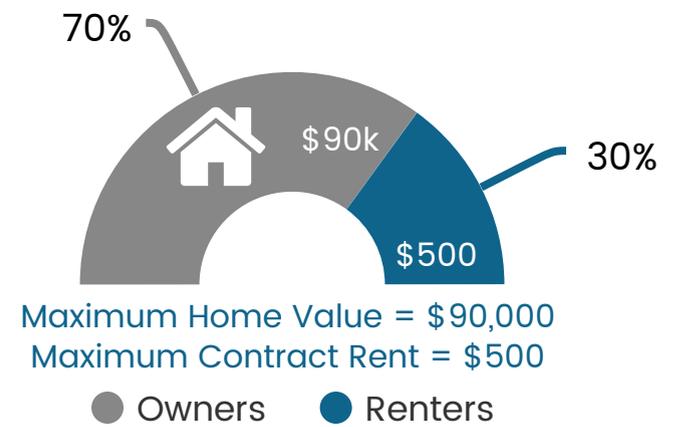
Infants and Debit Cards | M45

Lifestyles and Housing Preferences | National Averages

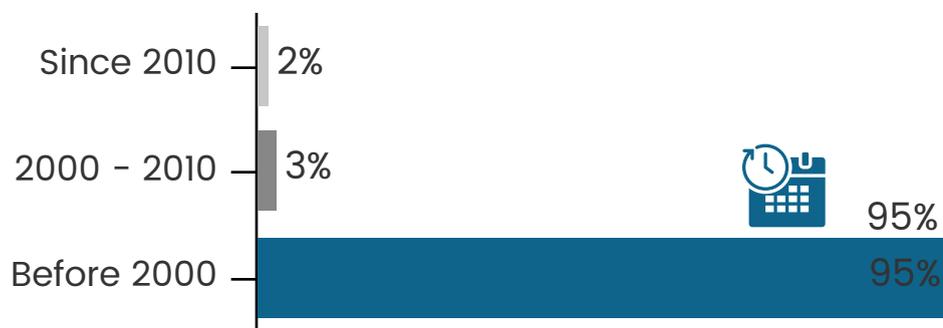
Average Annual Movership Rates



Average Tenure



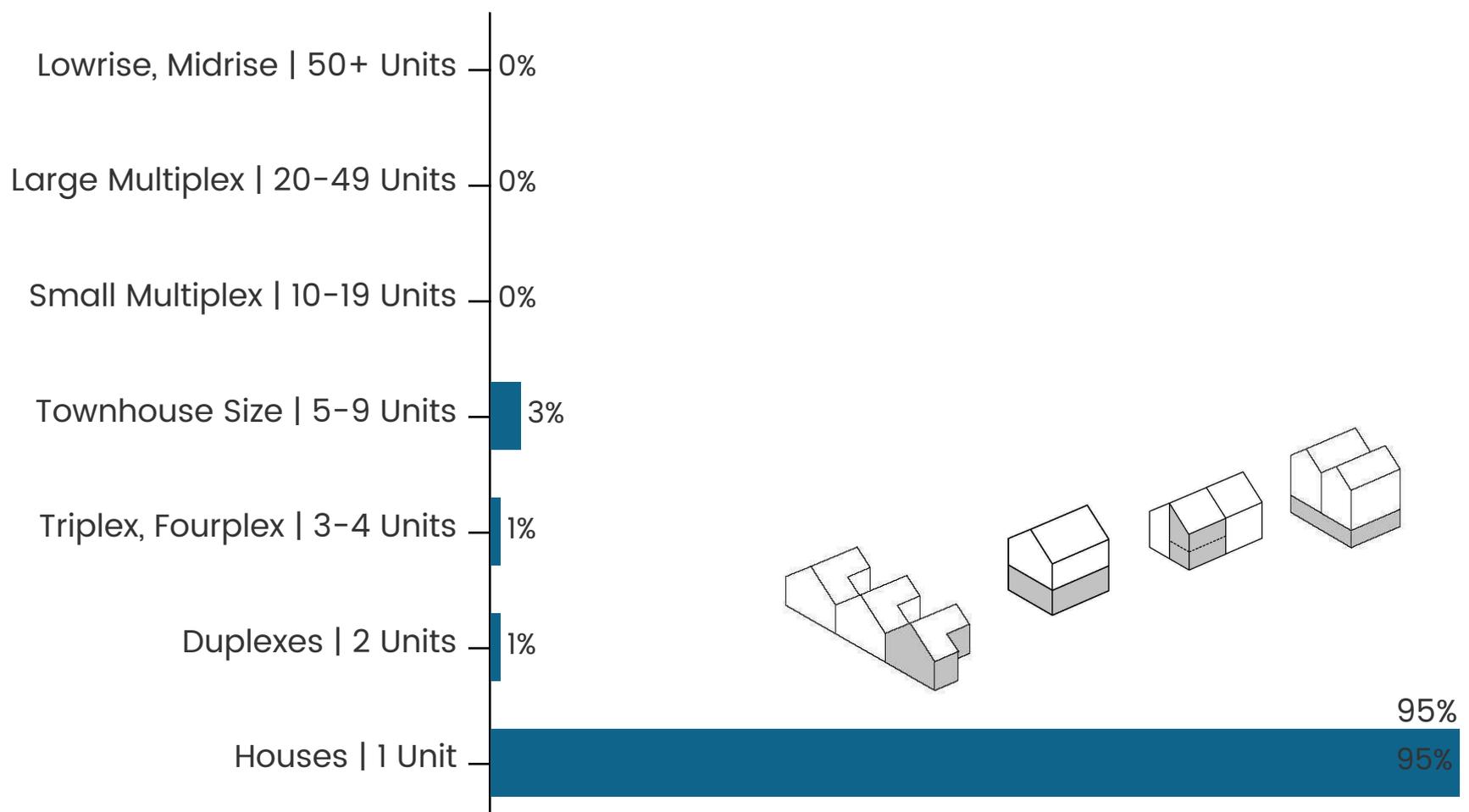
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Median Household Income



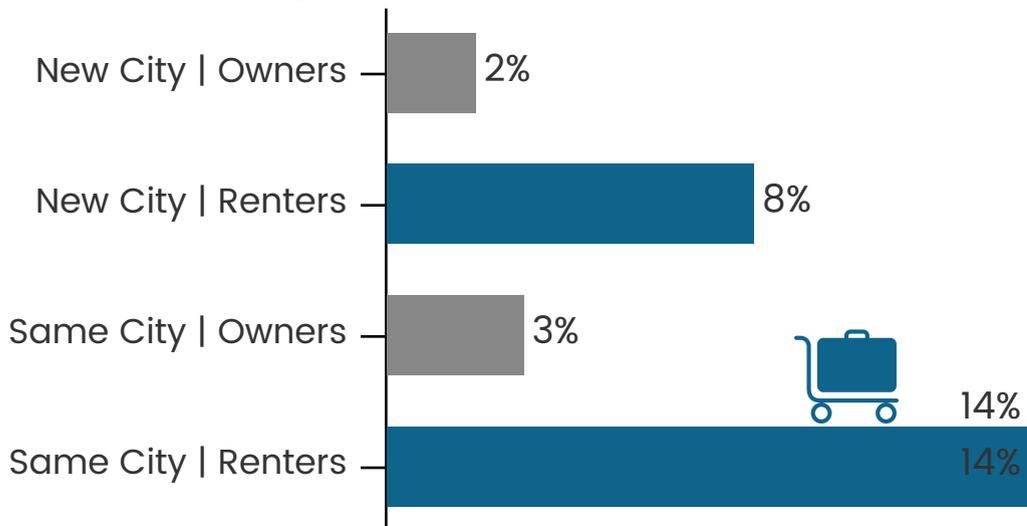
Inclination for Units by Building Size



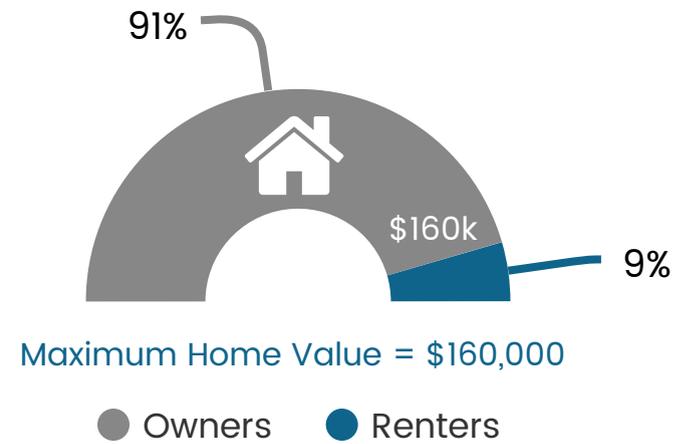
True Grit Americans | N46

Lifestyles and Housing Preferences | National Averages

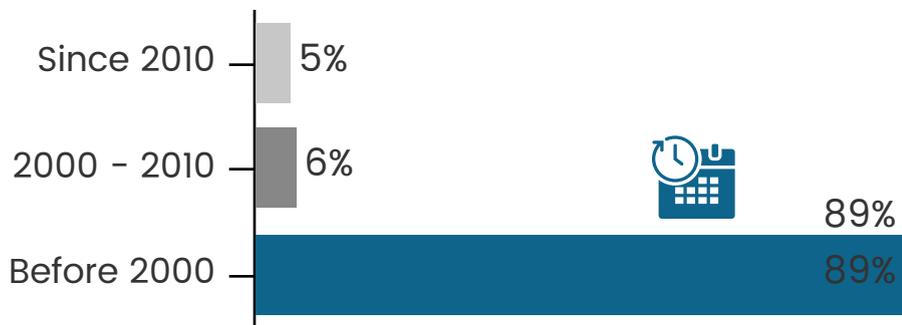
Average Annual Movership Rates



Average Tenure



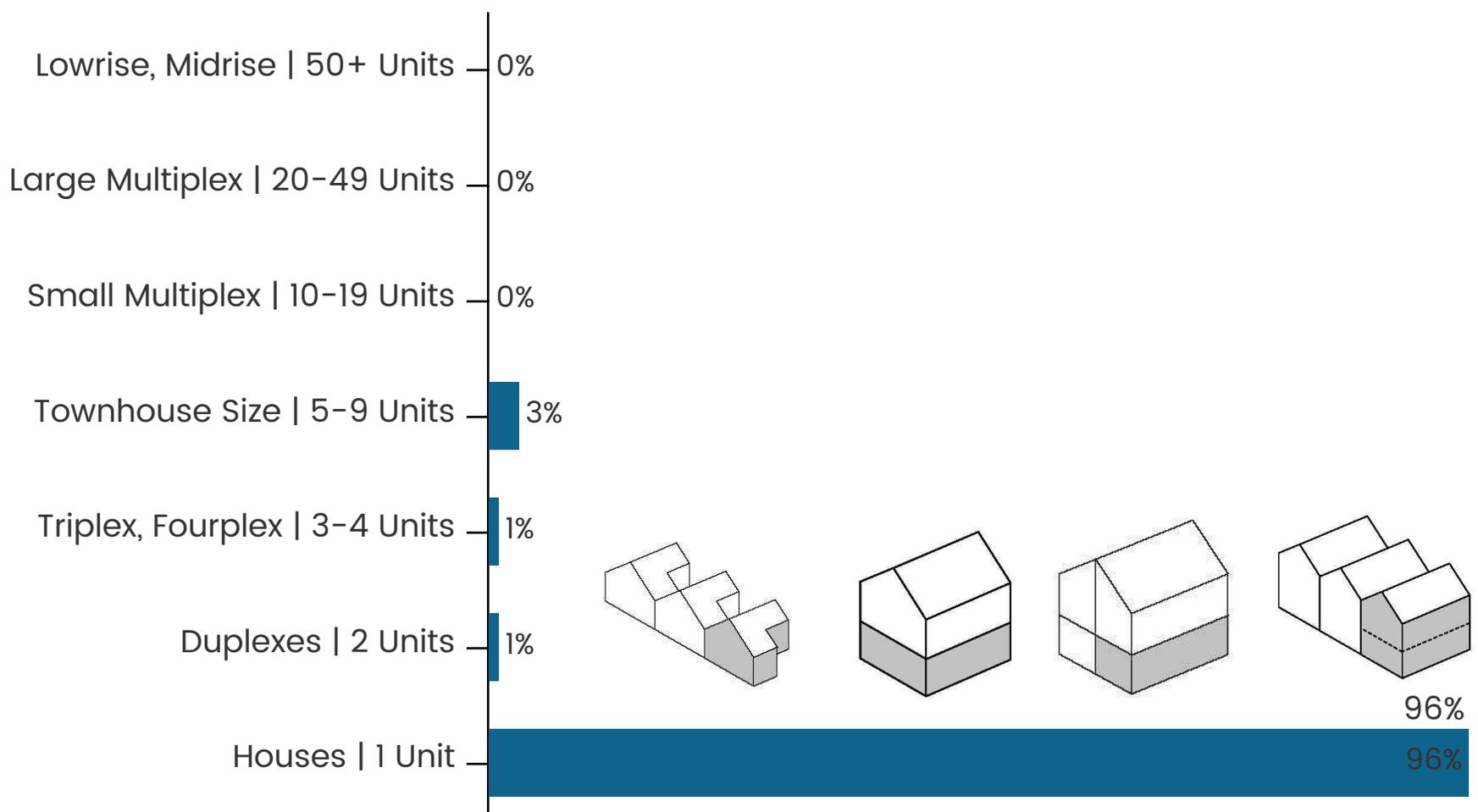
Inclination for Units by Decade Built



Median Household Income



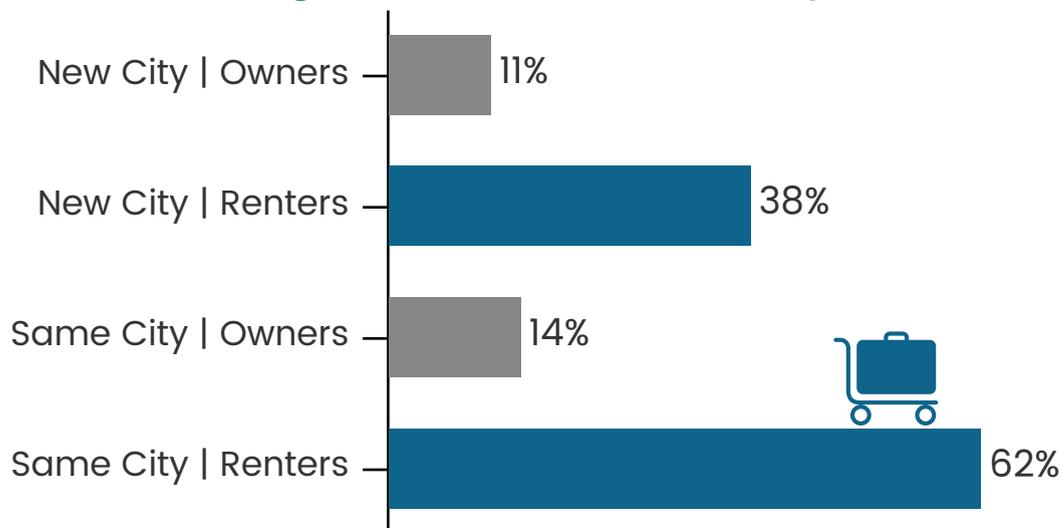
Inclination for Units by Building Size



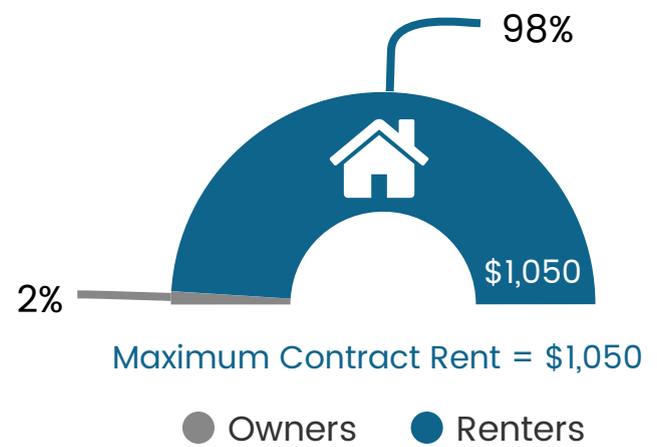
Full Steam Ahead | O50

Lifestyles and Housing Preferences | National Averages

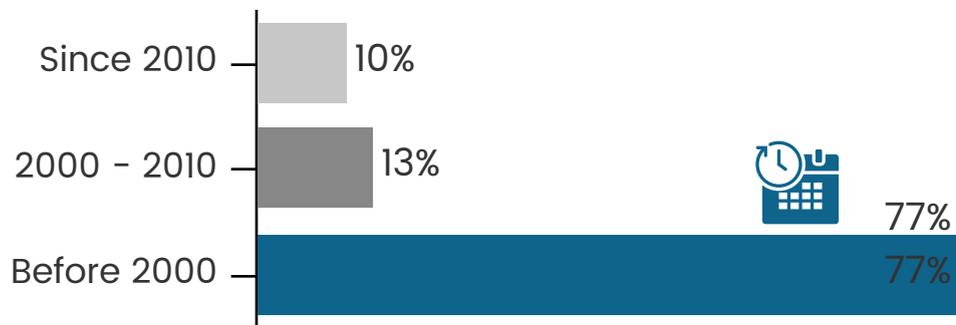
Average Annual Movership Rates



Average Tenure



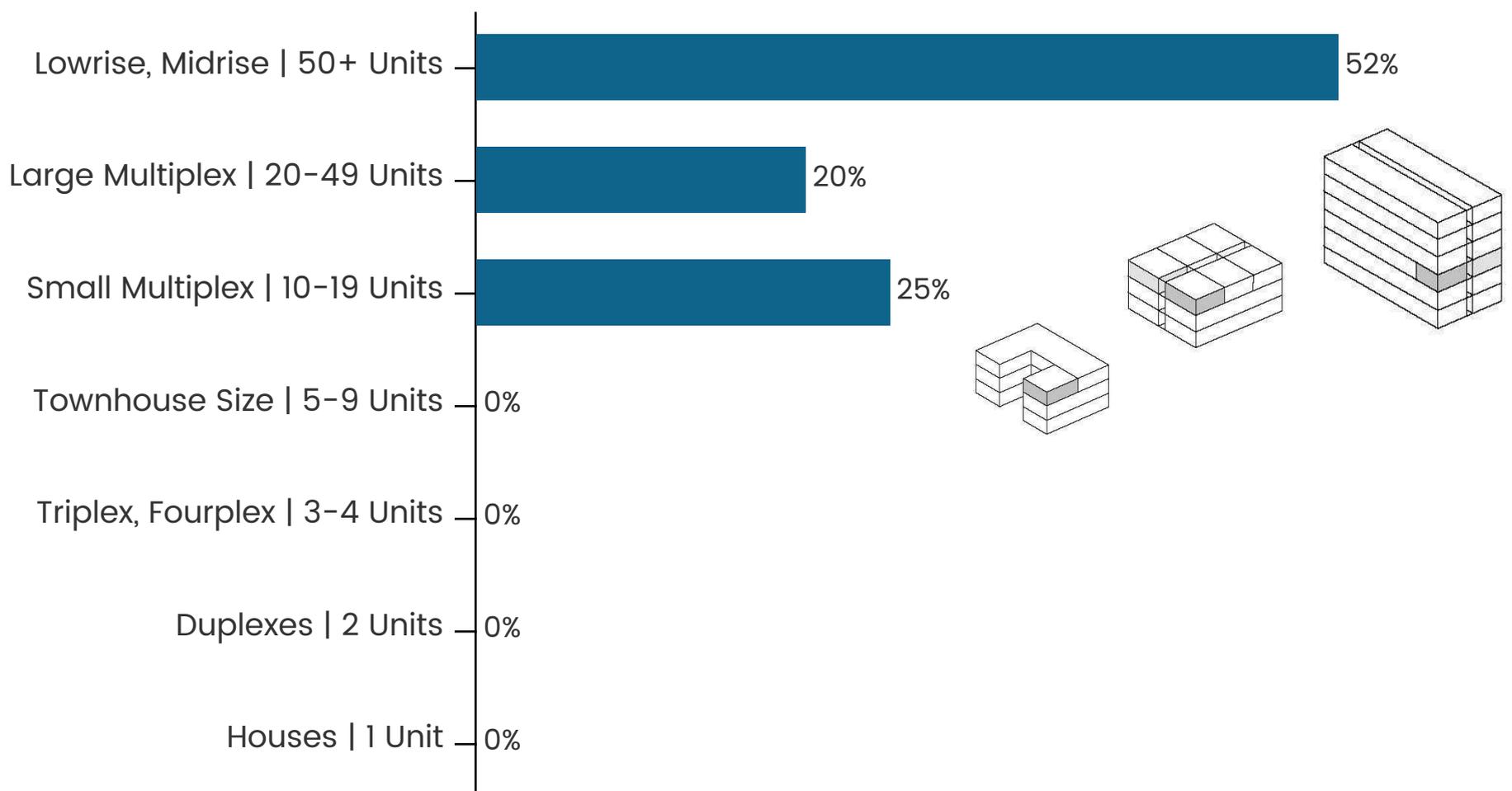
Inclination for Units by Decade Built



Median Household Income



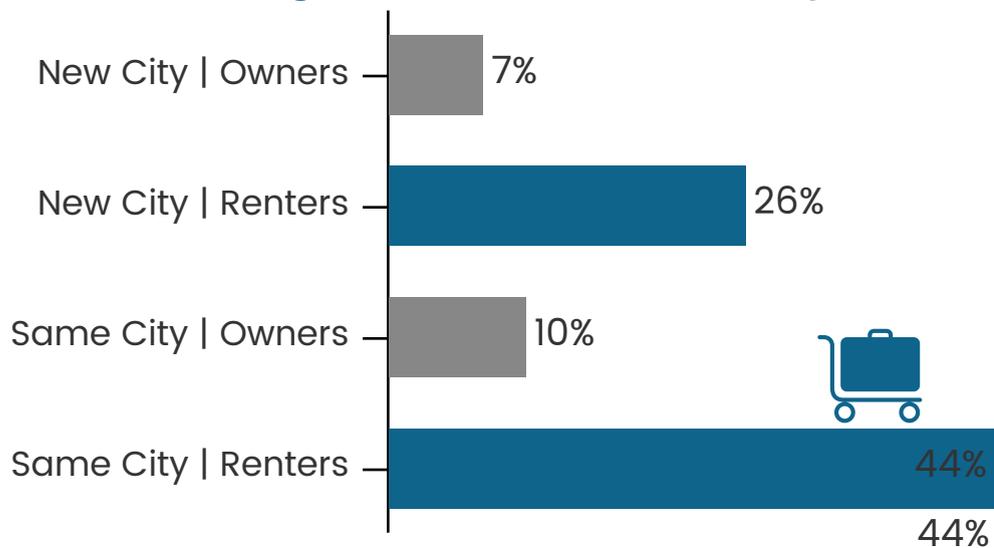
Inclination for Units by Building Size



Digital Dependents | O51

Lifestyles and Housing Preferences | National Averages

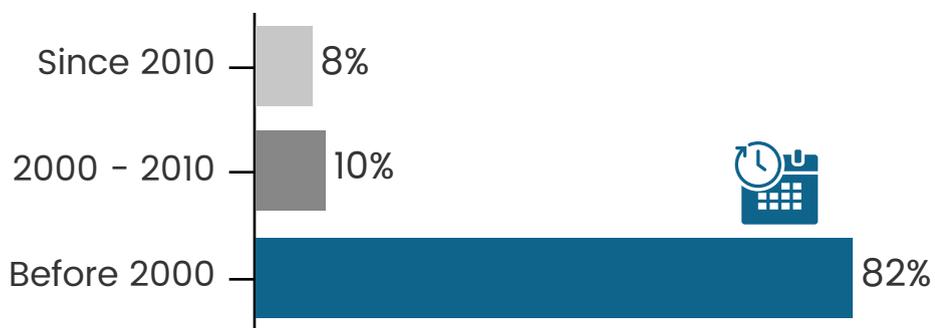
Average Annual Movership Rates



Average Tenure



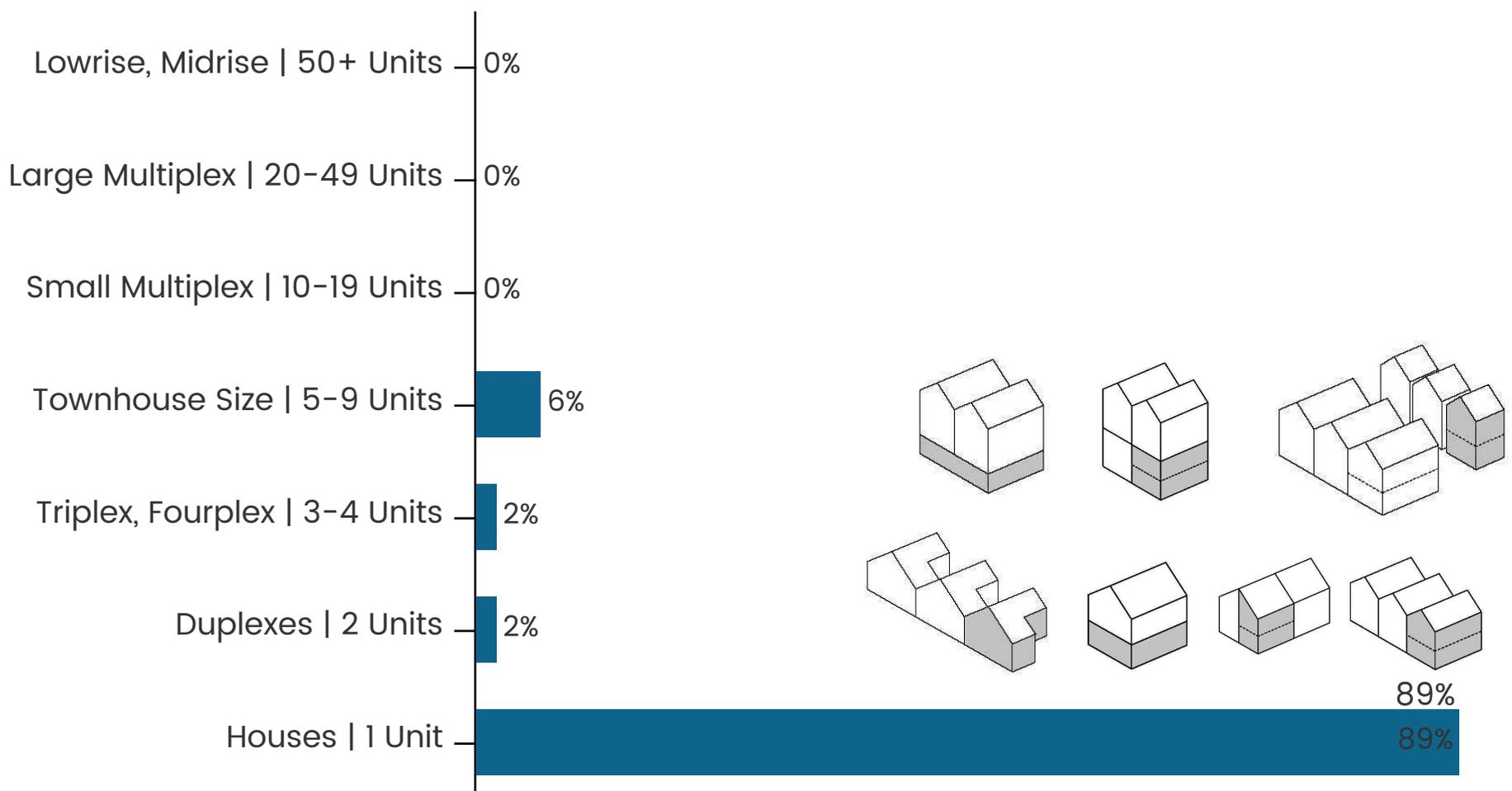
Inclination for Units by Decade Built



Median Household Income



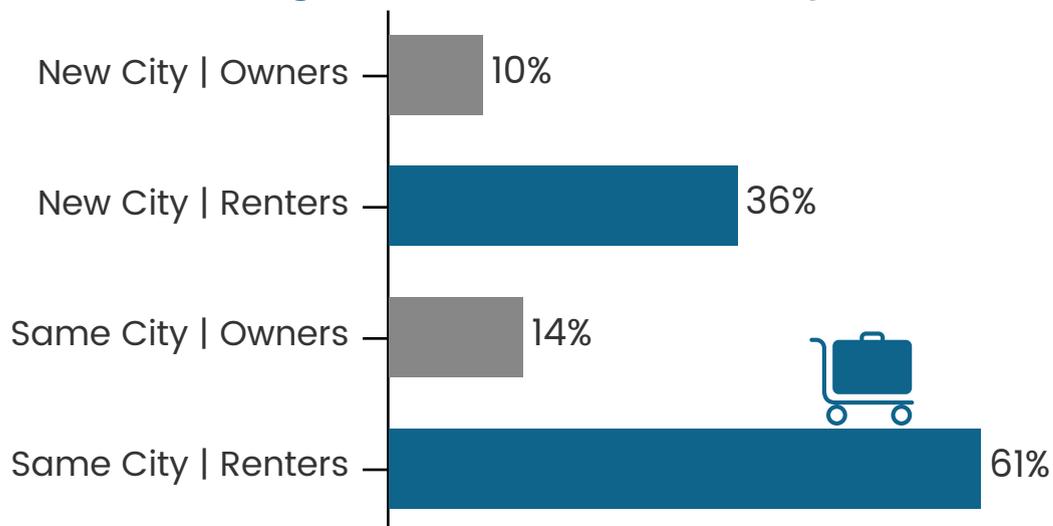
Inclination for Units by Building Size



Striving Single Scene | O54

Lifestyles and Housing Preferences | National Averages

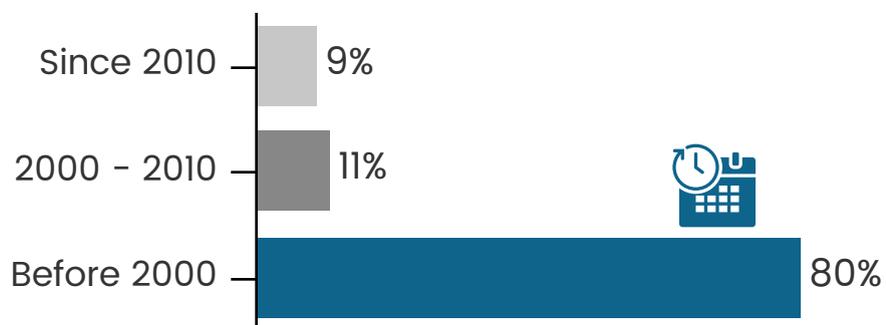
Average Annual Movership Rates



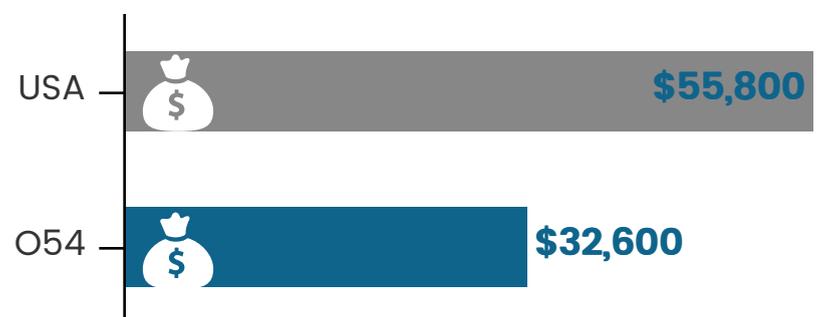
Average Tenure



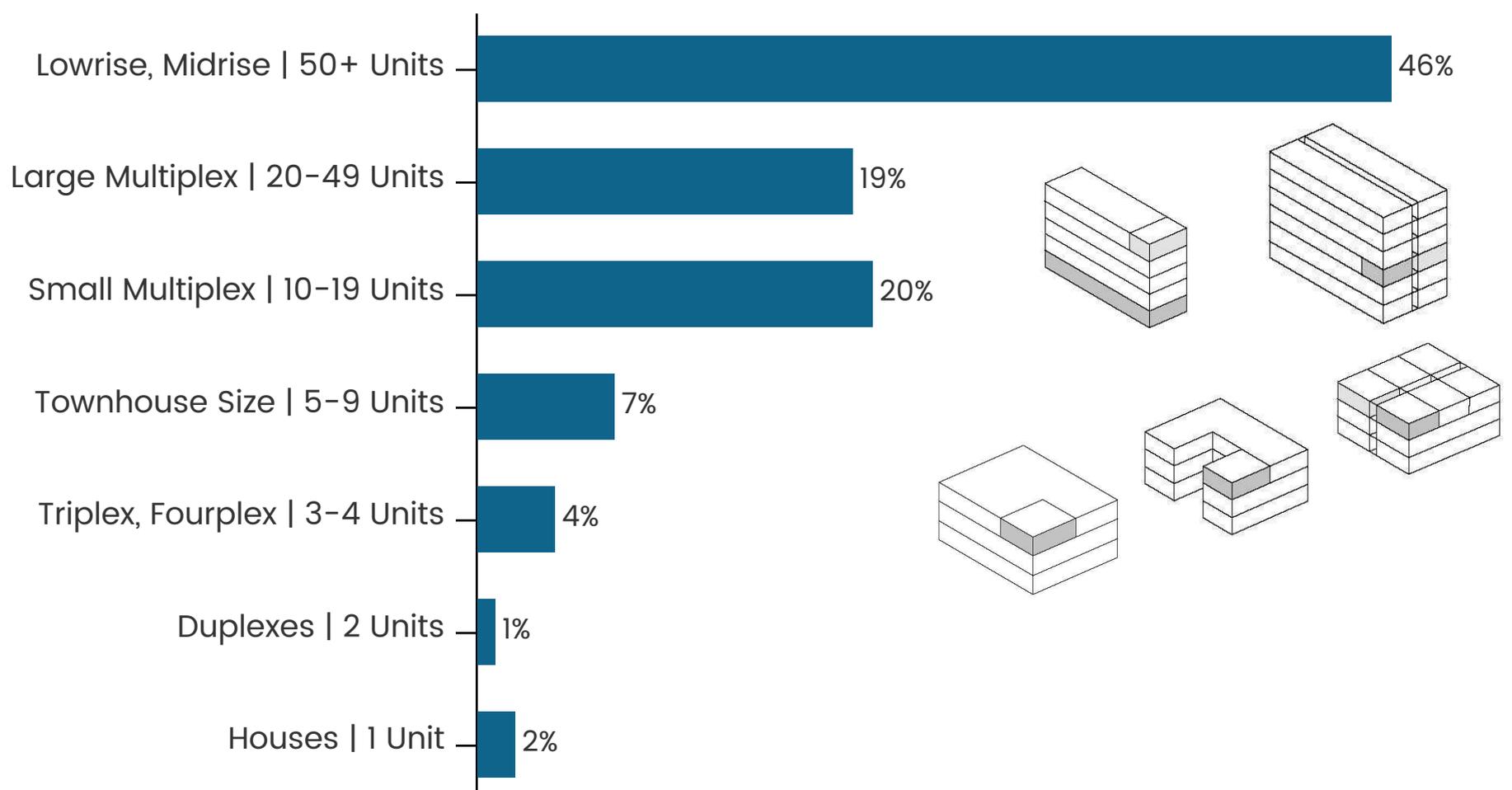
Inclination for Units by Decade Built



Median Household Income



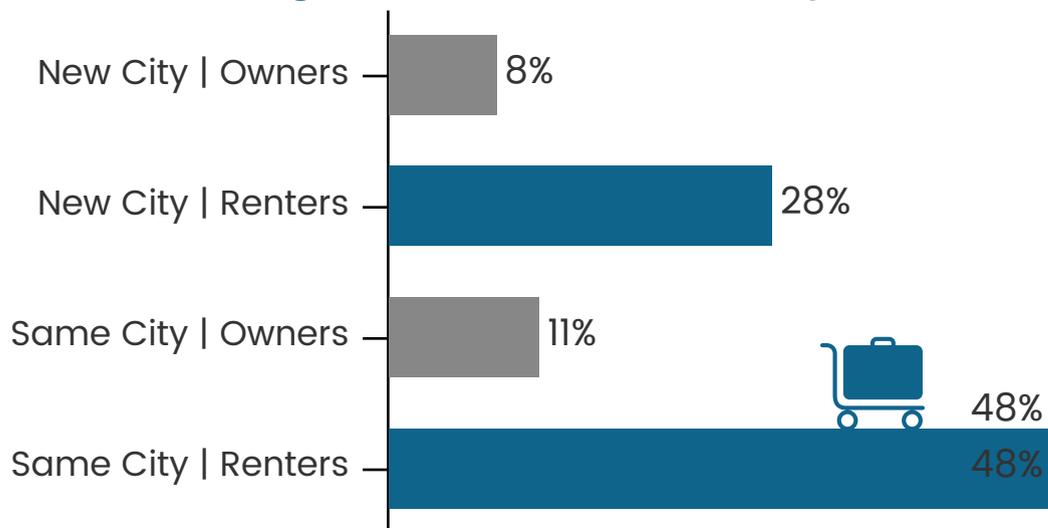
Inclination for Units by Building Size



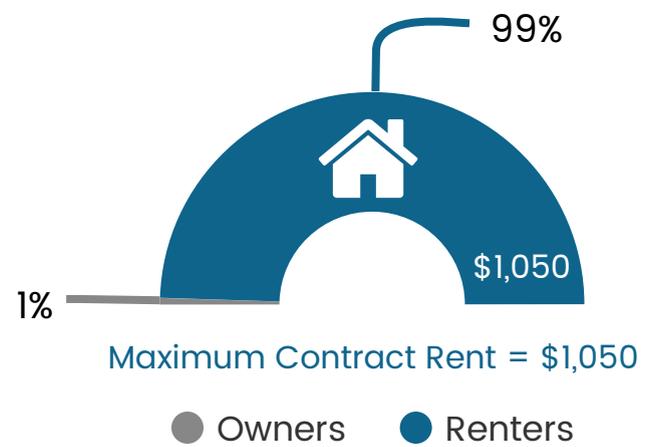
Family Troopers | O55

Lifestyles and Housing Preferences | National Averages

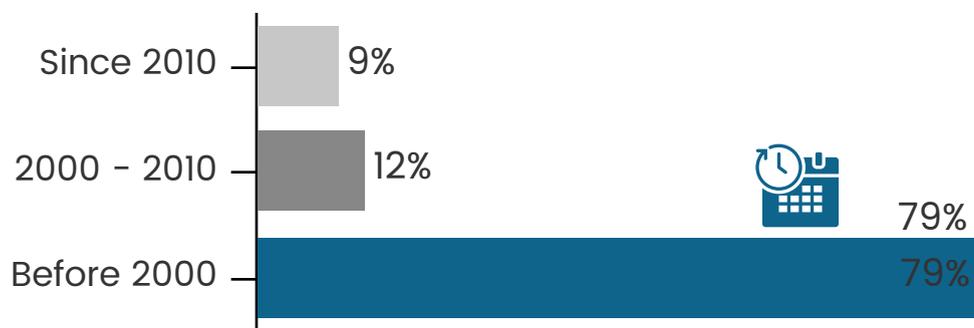
Average Annual Movership Rates



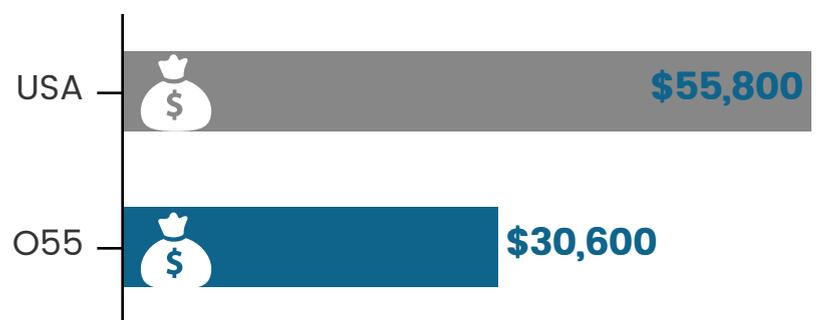
Average Tenure



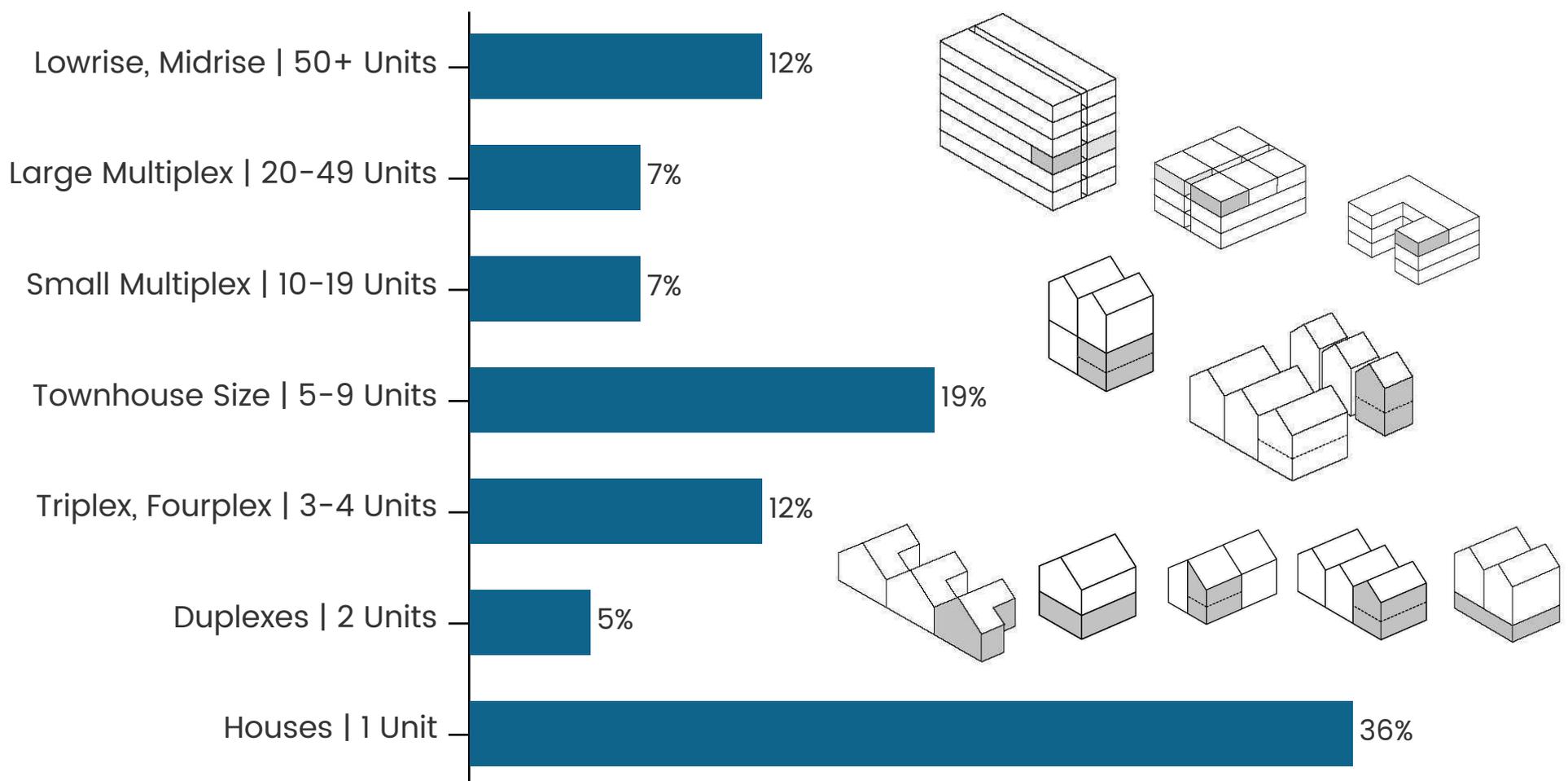
Inclination for Units by Decade Built



Median Household Income



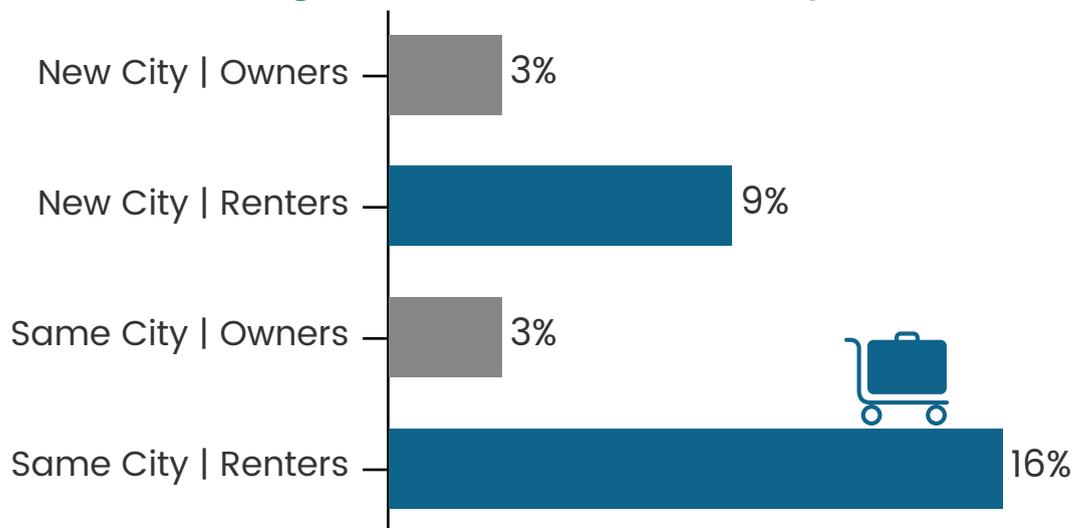
Inclination for Units by Building Size



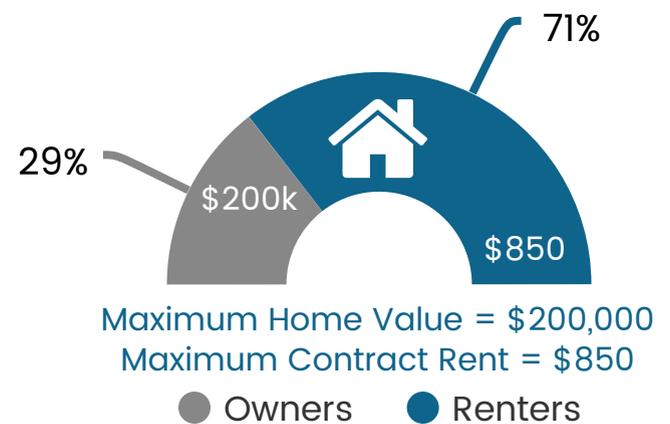
Senior Discounts | Q65

Lifestyles and Housing Preferences | National Averages

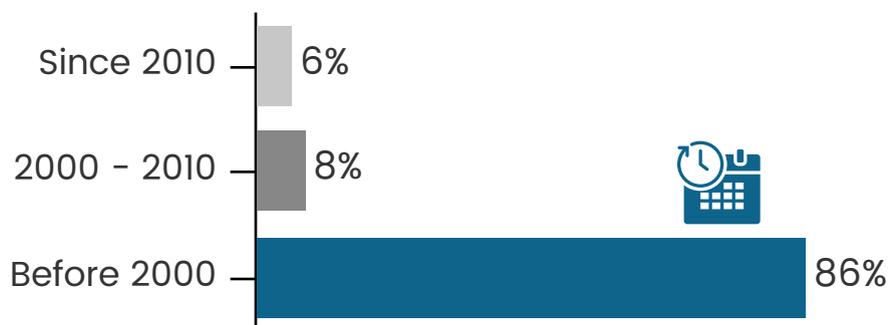
Average Annual Movership Rates



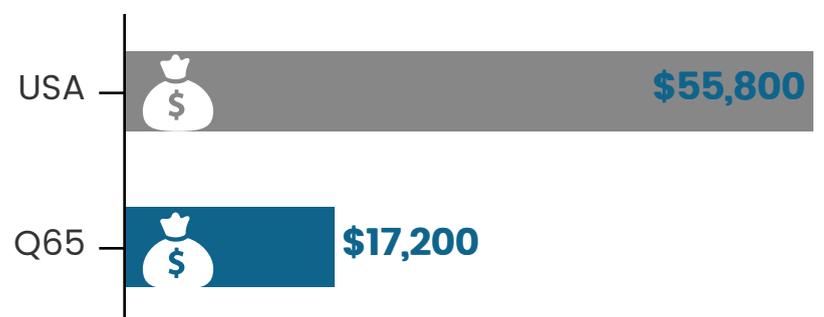
Average Tenure



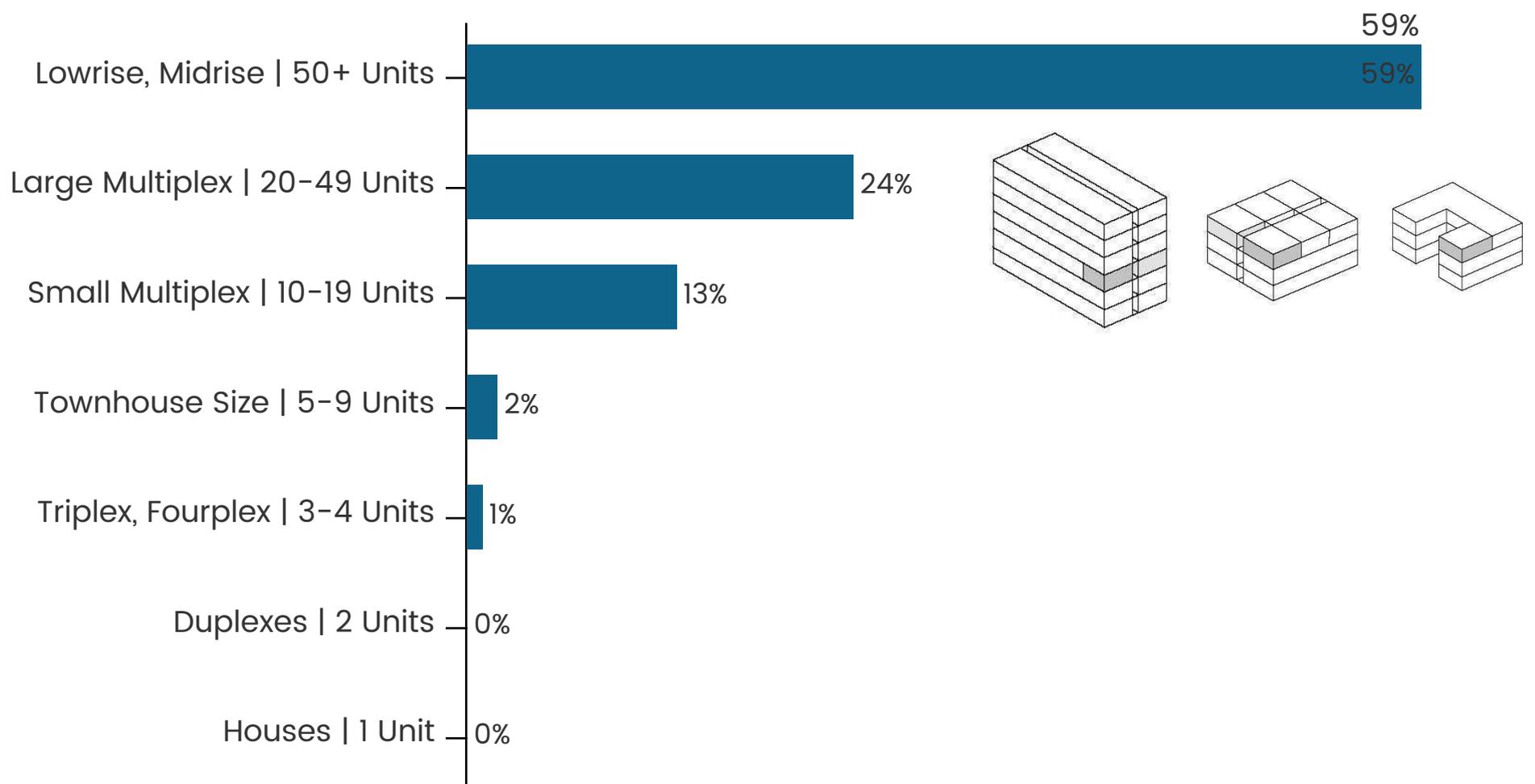
Inclination for Units by Decade Built



Median Household Income



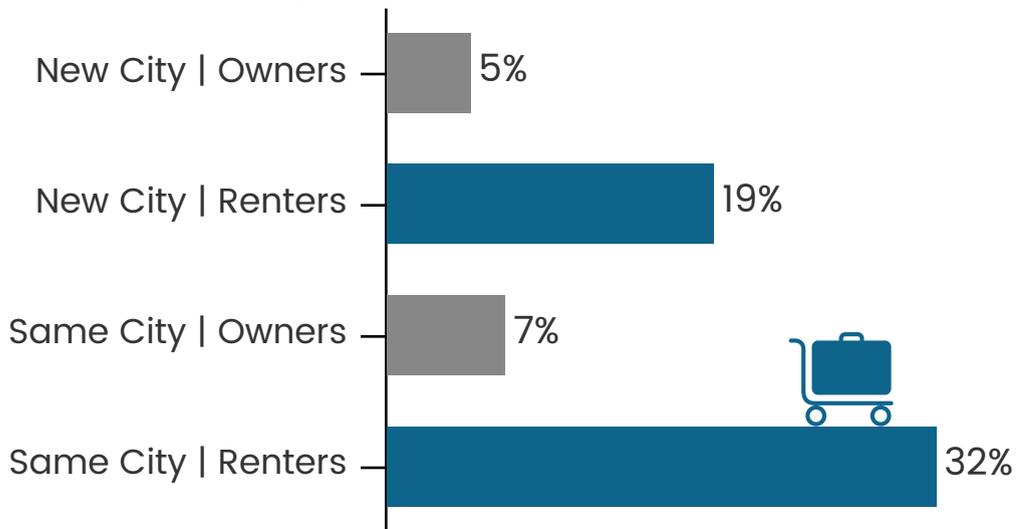
Inclination for Units by Building Size



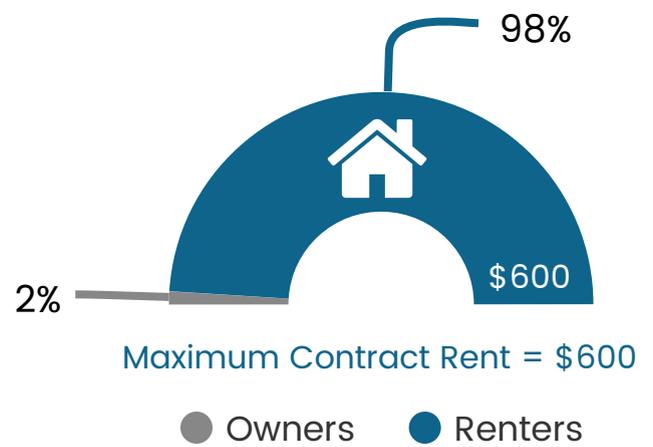
Dare to Dream | R66

Lifestyles and Housing Preferences | National Averages

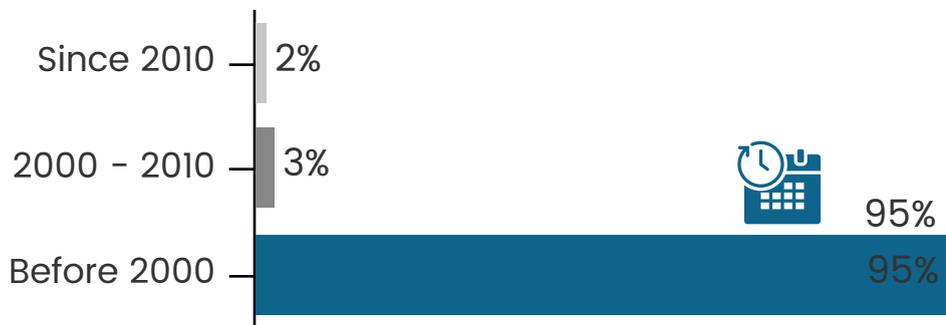
Average Annual Movership Rates



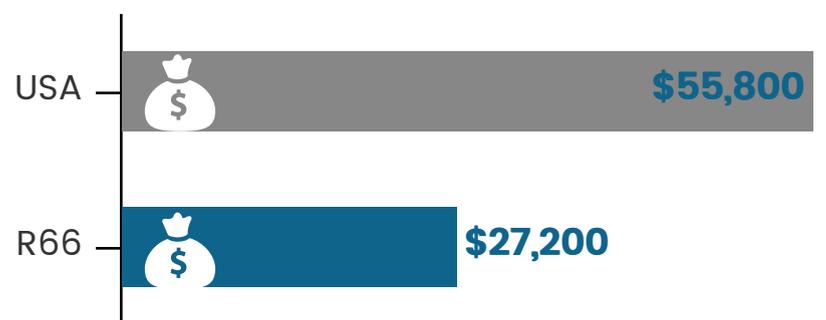
Average Tenure



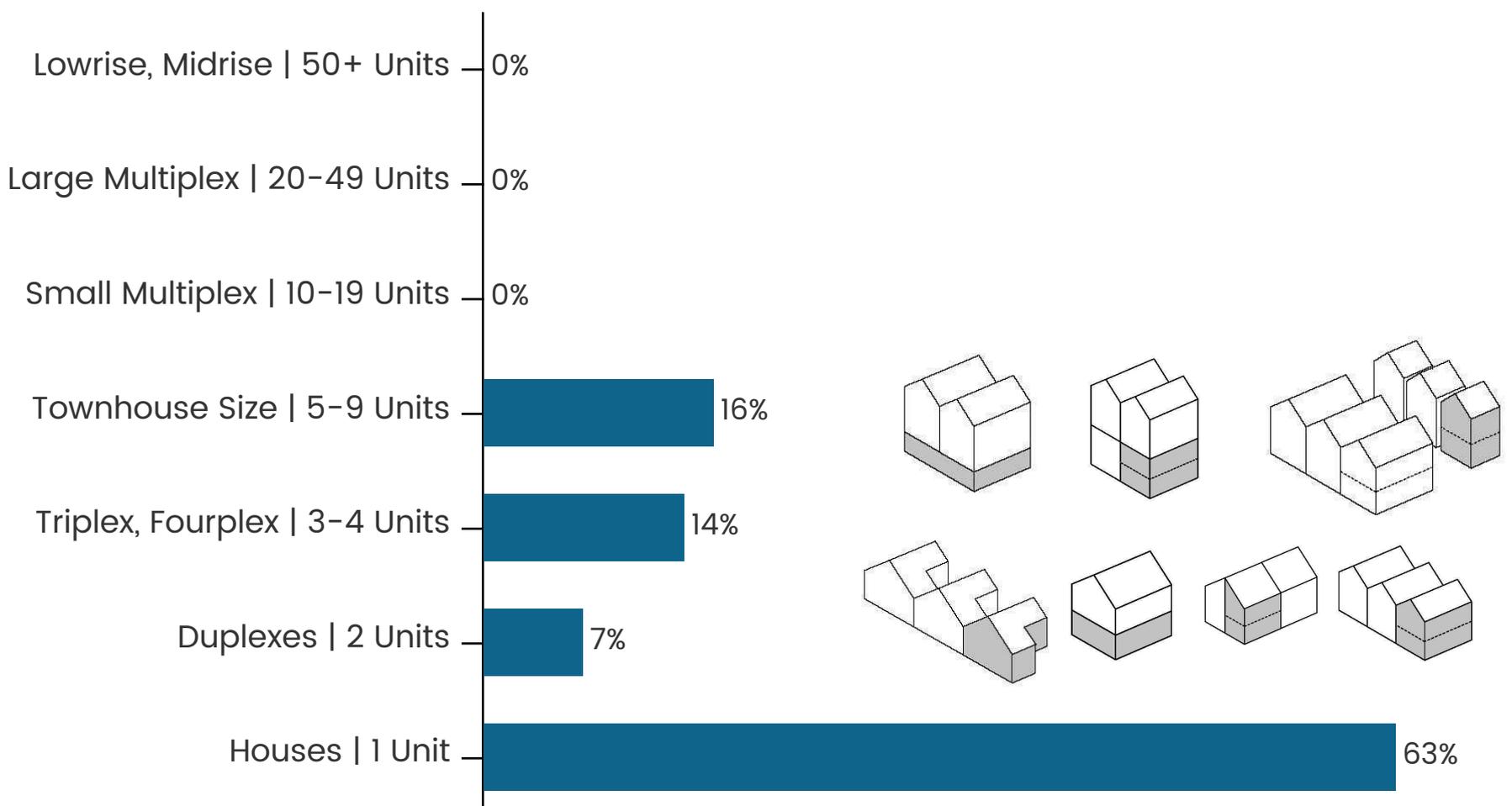
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Median Household Income



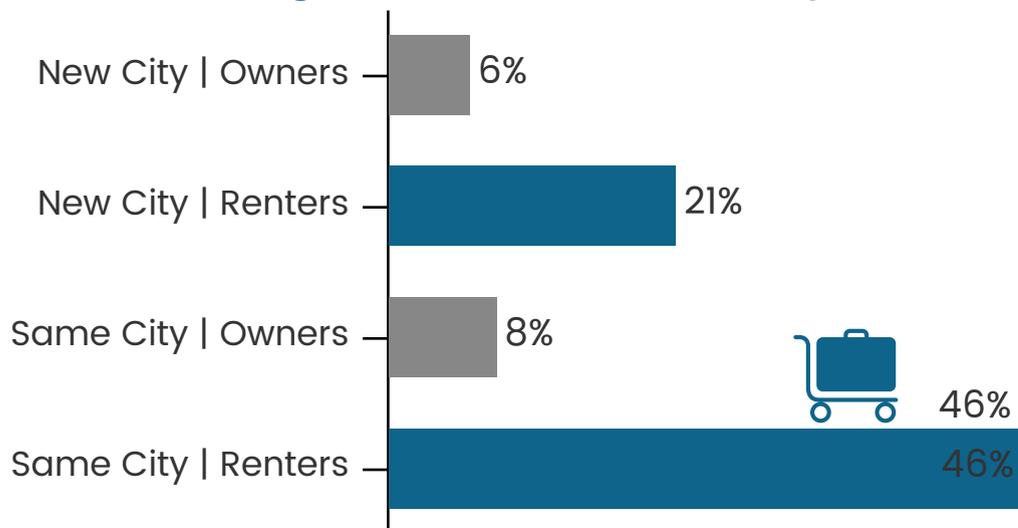
Inclination for Units by Building Size



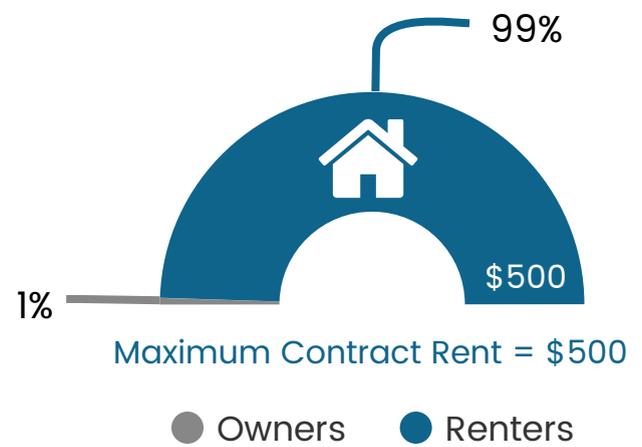
Hope for Tomorrow | R67

Lifestyles and Housing Preferences | National Averages

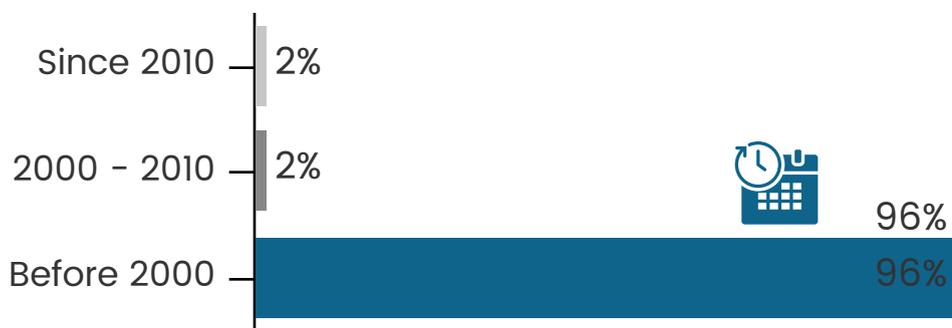
Average Annual Movership Rates



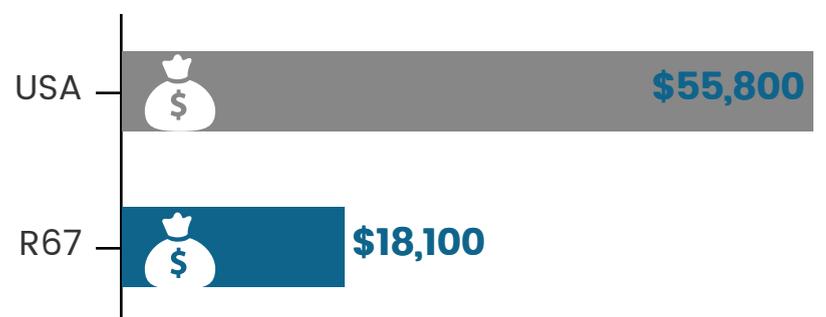
Average Tenure



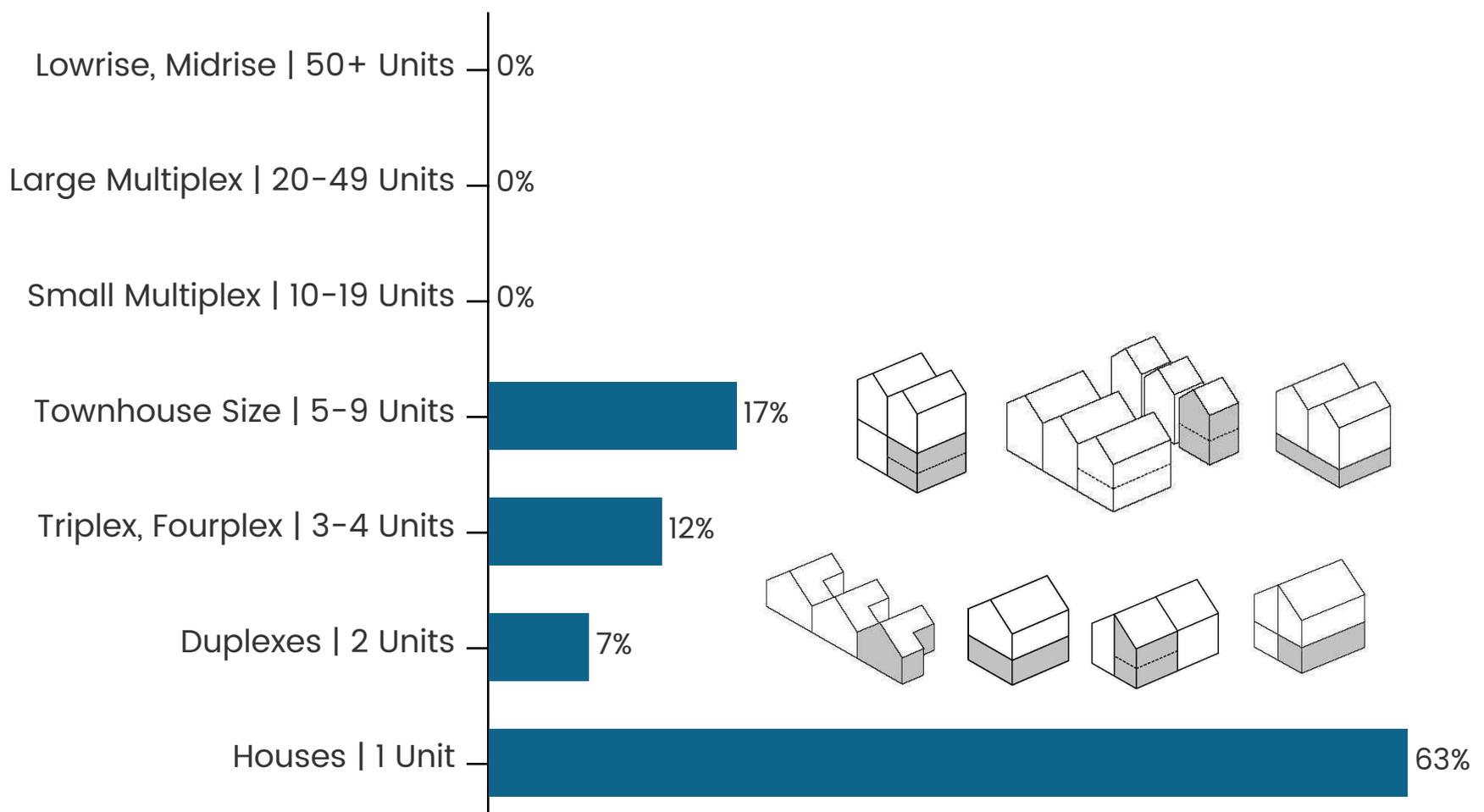
Inclination for Units by Decade Built



Median Household Income



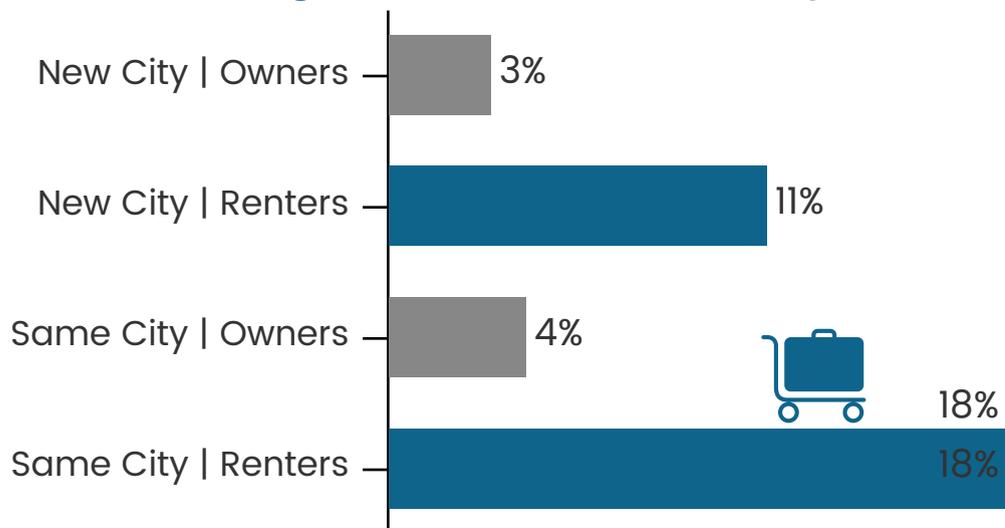
Inclination for Units by Building Size



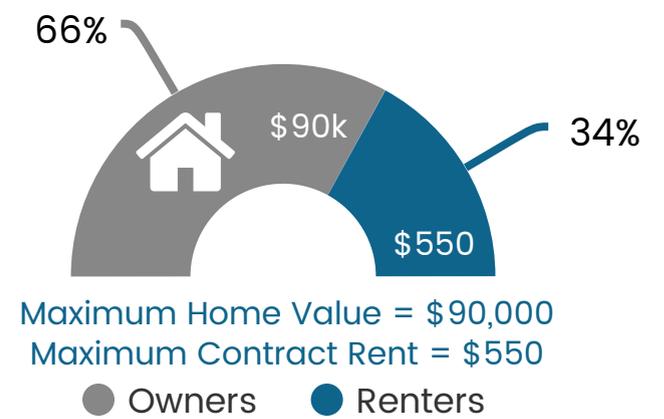
Small Towns, Shallow Pockets | S68

Lifestyles and Housing Preferences | National Averages

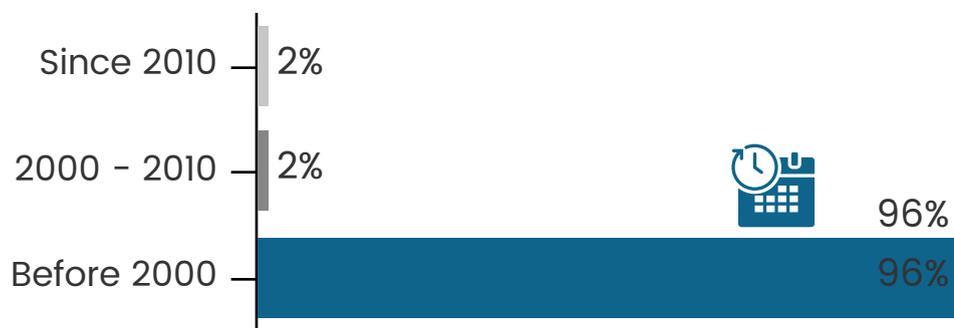
Average Annual Movership Rates



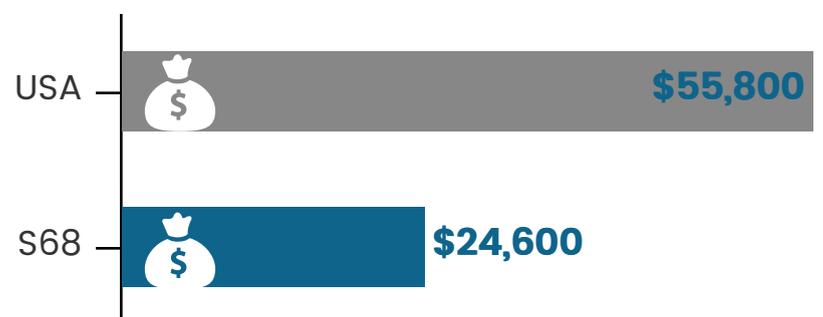
Average Tenure



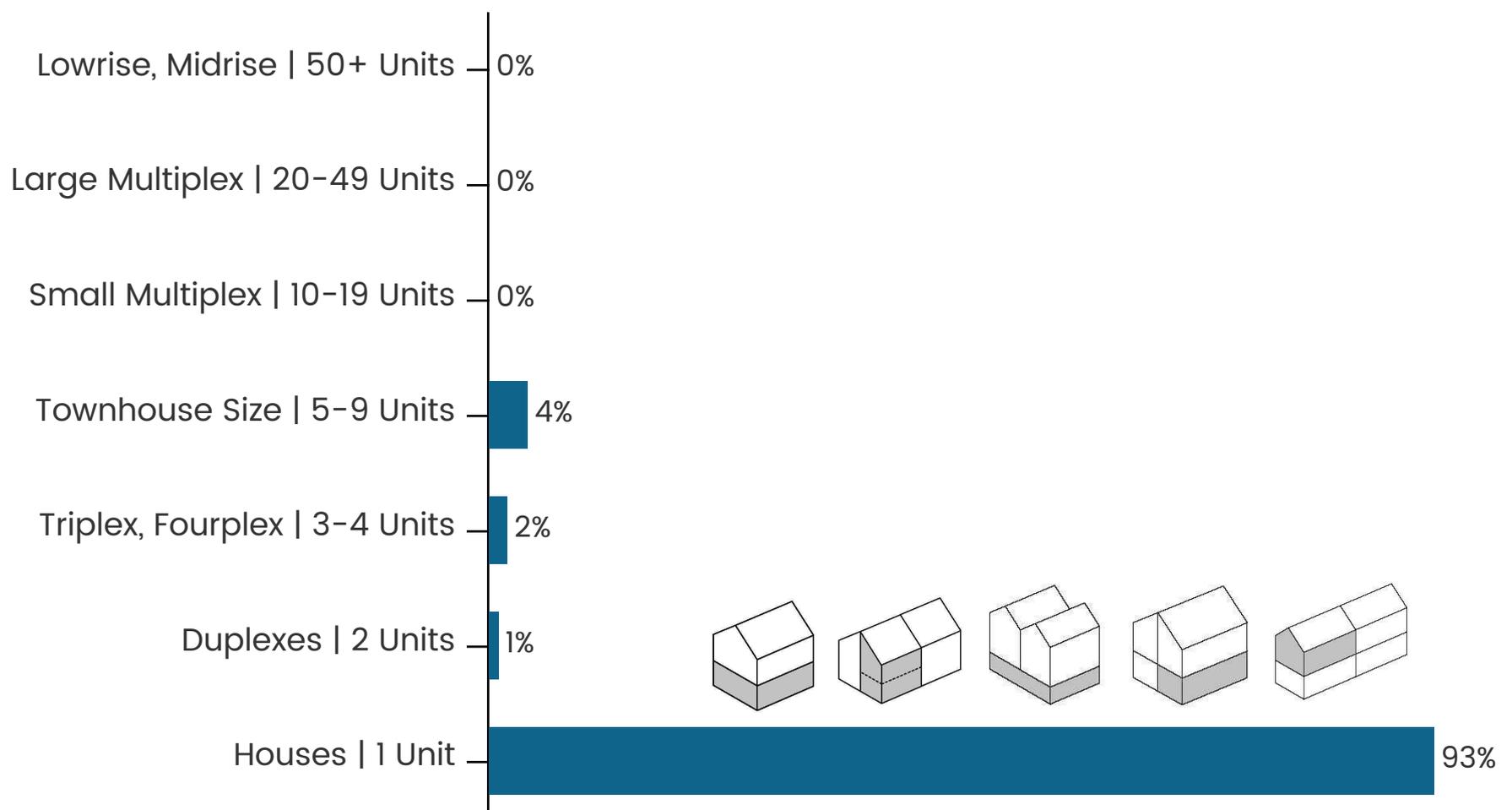
Inclination for Units by Decade Built



Median Household Income



Inclination for Units by Building Size

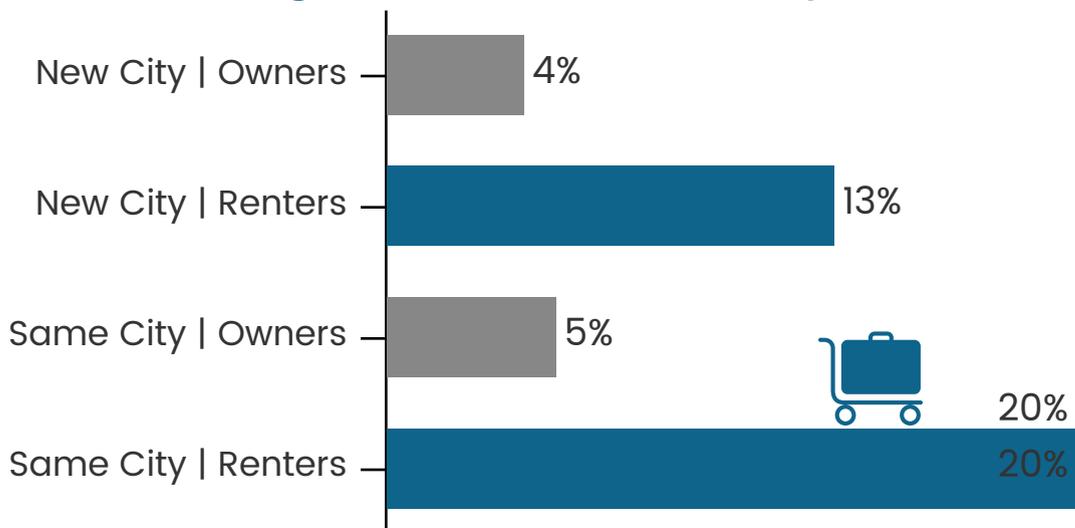


Source: Underlying data by Experian Decision Analytics. Exhibit and analysis by LandUseUSA, 2017. (C)

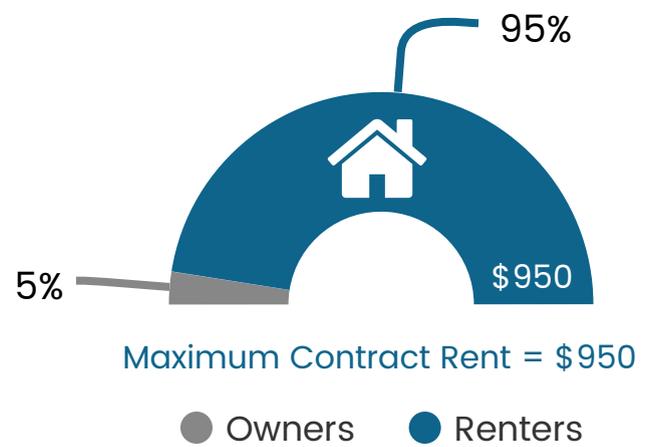
Tough Times | S71

Lifestyles and Housing Preferences | National Averages

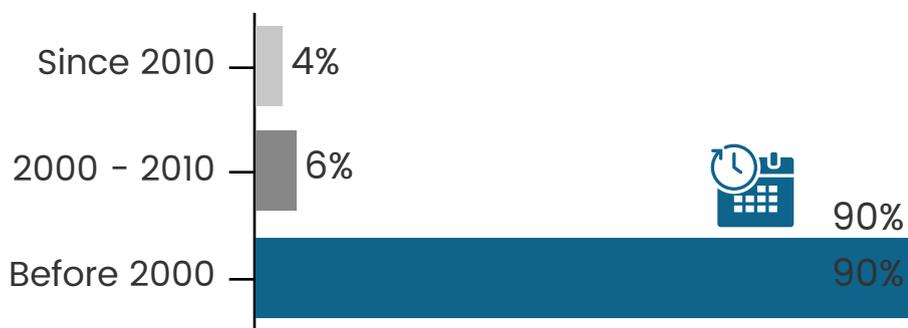
Average Annual Movership Rates



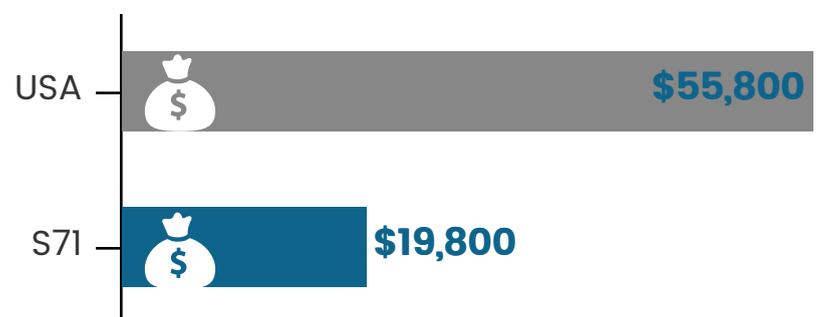
Average Tenure



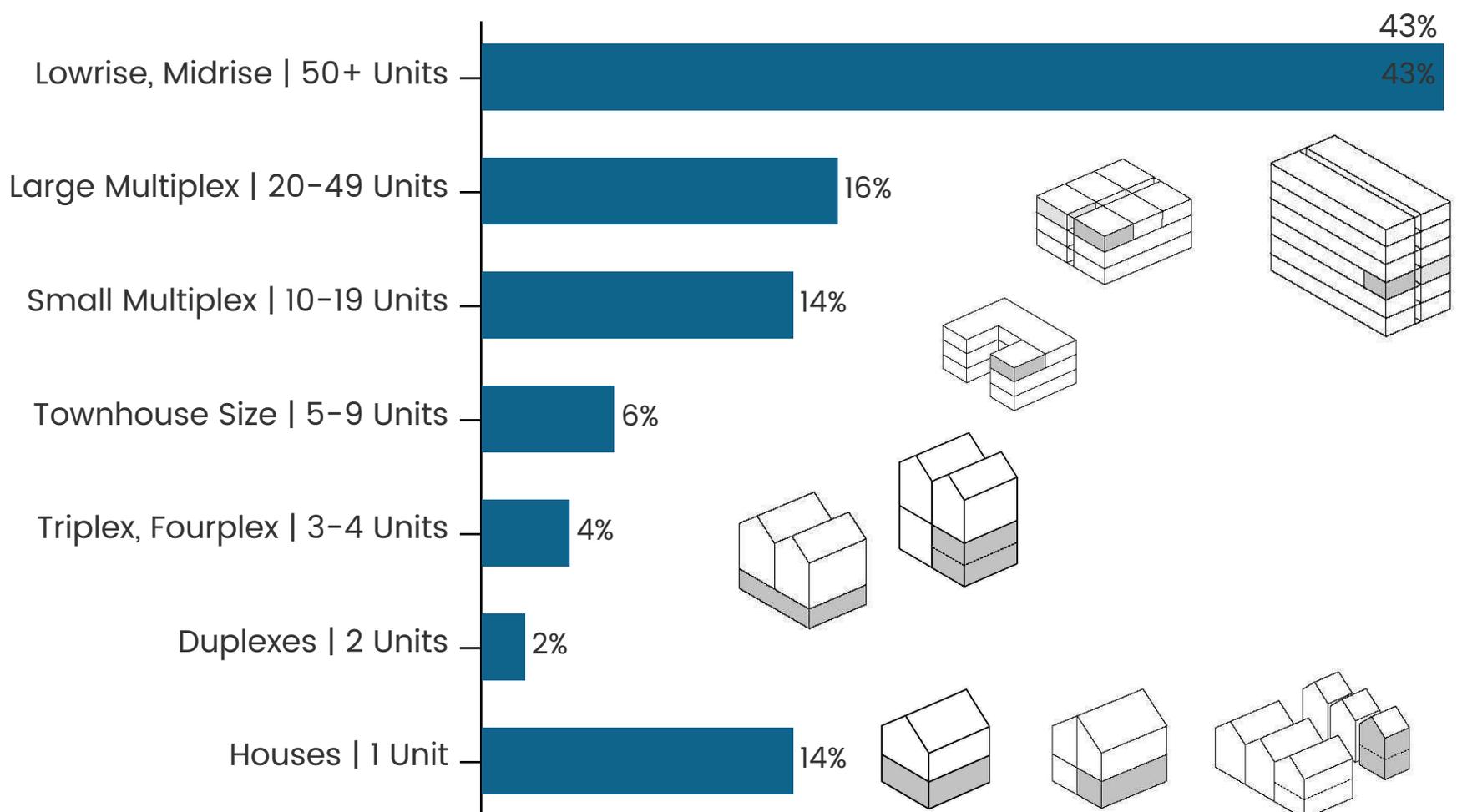
Inclination for Units by Decade Built



Median Household Income



Inclination for Units by Building Size



Source: Underlying data by Experian Decision Analytics. Exhibit and analysis by LandUseUSA, 2017. (c)



Segment/Group	Name	Short Description
A	Power Elite	The wealthiest households in the US, living in the most exclusive neighborhoods, and enjoying all that life has to offer
A01	American Royalty	Wealthy, influential couples and families living in prestigious suburbs
A02	Platinum Prosperity	Wealthy and established empty-nesting couples residing in suburban and in-town homes
A03	Kids and Cabernet	Prosperous, middle-aged married couples with children living child-focused lives in affluent suburbs
A04	Picture Perfect Families	Established families of child-rearing households living in wealthy suburbs
A05	Couples with Clout	Middle-aged, childless couples living in affluent metro areas
A06	Jet Set Urbanites	Mix of affluent singles and couples living in urban neighborhoods
B	Flourishing Families	Affluent, middle-aged families and couples earning prosperous incomes and living very comfortable, active lifestyles
B07	Generational Soup	Affluent couples and multi-generational families living a wide range of lifestyles in suburbia
B08	Babies and Bliss	Middle-aged couples with large families and active lives in affluent suburbia
B09	Family Fun-tastic	Upscale, middle-aged families with older children pursuing busy kid-centered lives in satellite cities
B10	Cosmopolitan Achievers	Affluent middle-aged and established couples and families enjoying dynamic lifestyles in metro areas
C	Booming with Confidence	Prosperous, established couples in their peak earning years living in suburban homes
C11	Aging of Aquarius	Upscale boomer-aged couples living in city and close-in suburbs
C12	Golf Carts and Gourmets	Upscale retirees and empty-nesters in comfortable communities
C13	Silver Sophisticates	Mature, upscale couples and singles in suburban homes
C14	Boomers and Boomerangs	Baby boomer adults and their teenage/young adult children sharing suburban homes
D	Suburban Style	Middle-aged, ethnically-mixed suburban families and couples earning upscale incomes
D15	Sports Utility Families	Upscale, multi-generational households of middle-aged couples with school-aged children living active family lifestyles in outlying suburbs
D16	Settled in Suburbia	Upper middle-class diverse family units and empty nesters living in established suburbs
D17	Cul de Sac Diversity	Ethnically-diverse, middle-aged families settled in new suburban neighborhoods
D18	Suburban Attainment	Upper middle-class couples and families living mainly in the expanding suburbs
E	Thriving Boomers	Upper-middle-class baby boomer-age couples living comfortable lifestyles settled in town and exurban homes
E19	Full Pockets, Empty Nests	Empty-nesting, upper middle-class households with discretionary income living sophisticated lifestyles
E20	No Place Like Home	Upper middle-class multi-generational households in exurban areas
E21	Unspoiled Splendor	Comfortably established baby boomer couples in town and country communities

F	Promising Families	Young couples with children in starter homes living child-centered lifestyles
F22	Fast Track Couples	Active, young, upper middle-class suburban couples and families living upwardly-mobile lifestyles
F23	Families Matter Most	Young, middle-class families in scenic suburbs leading active, family-focused lives
G	Young, City Solos	Younger and middle-aged singles living active and energetic lifestyles in metropolitan areas
G24	Status Seeking Singles	Younger, upwardly-mobile singles living in mid-scale metro areas balancing work and leisure lifestyles
G25	Urban Edge	Younger, up-and-coming singles living big city lifestyles located within top CBSA markets
H	Middle-class Melting Pot	Mid-scale, middle-aged and established couples living in suburban and fringe homes
H26	Progressive Potpourri	Mature, couples with comfortable and active lives in middle-class suburbs
H27	Birkenstocks and Beemers	Upper middle-class, established couples living leisure lifestyles in small towns and cities
H28	Everyday Moderates	Mid-scale, multi-cultural couples and families living in mid-tier metro suburban settings
H29	Destination Recreation	Middle-aged, midscale couples in rural towns and fringe suburbs working to enjoy their active lifestyles
I	Family Union	Mid-scale, middle-aged families living in homes supported by solid blue-collar occupations
I30	Stockcars and State Parks	Middle-class couples and families living in more remote rural communities
I31	Blue Collar Comfort	Middle-class families in smaller cities and towns with solid blue-collar jobs
I32	Steadfast Conventionalists	Conventional Generation X families located in selected coastal city homes
I33	Balance and Harmony	Middle-class families living lively lifestyles in city-centric neighborhoods
J	Autumn Years	Established and mature couples living gratified lifestyles in older homes
J34	Aging in Place	Middle-class seniors living solid, suburban lifestyles
J35	Rural Escape	Older, middle-class couples and singles living comfortable lives in rural towns
J36	Settled and Sensible	Older, middle-class and empty-nesting couples and singles in city neighborhoods
K	Significant Singles	Middle-aged singles and some couples earning mid-scale incomes supporting active city styles of living
K37	Wired for Success	Young, mid-scale singles and couples living socially-active city lives
K38	Gotham Blend	Mix of middle-aged and middle-class singles and couples mainly living urban New York City-area lifestyles
K39	Metro Fusion	Middle-aged singles living urban active lifestyles
K40	Bohemian Groove	Older unattached individuals enjoying settled urban lives
L	Blue Sky Boomers	Lower- and middle-class baby boomer-aged households living in small towns
L41	Booming and Consuming	Older empty-nesting couples and singles enjoying relaxed lives in small towns
L42	Rooted Flower Power	Mid-scale baby boomer singles and couples rooted in established suburban communities and approaching retirement
L43	Homemade Happiness	Lower middle-class baby boomer households living in remote town and country homes
M	Families in Motion	Younger, working-class families earning moderate incomes in smaller residential communities
M44	Red, White and Bluegrass	Lower middle-income rural families with diverse adult and children household dynamics
M45	Infants and Debit Cards	Young, working-class families and single parent households living in small established, city residences

N	Pastoral Pride	Mix of lower middle-class unattached individuals and couples who have settled in country and small town areas
N46	True Grit Americans	Older, middle-class households in town and country communities located in the nation's midsection
N47	Countrified Pragmatics	Lower middle-income couples and singles living rural, casual lives
N48	Rural Southern Bliss	Lower middle-income multi-generational families living in small towns
N49	Touch of Tradition	Working-class, middle-aged couples and singles living in rural homes
O	Singles and Starters	Young singles starting out, and some starter families, in diverse urban communities
O50	Full Steam Ahead	Younger and middle-aged singles gravitating to second-tier cities
O51	Digital Dependents	Mix of Generation Y and X singles who live digital-driven, urban lifestyles
O52	Urban Ambition	Mainly Generation Y singles and single families established in mid-market cities
O53	Colleges and Cafes	Young singles and recent college graduates living in college communities
O54	Striving Single Scene	Young, singles living in Midwest and Southern city centers
O55	Family Troopers	Families and single-parent households living near military bases
P	Cultural Connections	Diverse, mid- and low-income families in urban apartments and residences
P56	Mid-scale Medley	Middle-aged, mid-scale income singles and divorced individuals in secondary cities
P57	Modest Metro Means	Mid-scale singles established in inner-city communities
P58	Heritage Heights	Singles and families with mid and low incomes living settled lives in urban apartments
P59	Expanding Horizons	Middle-aged, mid-scale income families living mainly within US border cities
P60	Striving Forward	Mid-scale families and single parents in gateway communities
P61	Humble Beginnings	Multi-cultural singles and single-parent households with mid-scale incomes in city apartments
Q	Golden Year Guardians	Retirees living in settled residences and communities
Q62	Reaping Rewards	Relaxed, retired couples and widowed individuals in suburban homes living quiet lives
Q63	Footloose and Family Free	Elderly couples and widowed individuals living active and comfortable lifestyles
Q64	Town Elders	Stable, minimalist seniors living in older residences and leading sedentary lifestyles
Q65	Senior Discounts	Downscale, settled retirees in metro apartment communities
R	Aspirational Fusion	Low-income singles and single parents living in urban locations striving to make a better life
R66	Dare to Dream	Young singles, couples and single parents with lower incomes starting out in city apartments
R67	Hope for Tomorrow	Young, lower-income single parents in second-city apartments
S	Economic Challenges	Economically challenged mix of singles, divorced and widowed individuals in smaller cities and urban areas looking to make ends meet
S68	Small Town Shallow Pockets	Older, low income singles and empty-nesters living in modest ex-urban small towns
S69	Urban Survivors	Older, lower income singles and single parents established in modest urban neighborhoods
S70	Tight Money	Middle-aged, lower income unattached individuals in transitional small town and ex-urban apartments
S71	Tough Times	Older, lower income and ethnically-diverse singles typically concentrated in inner-city apartments