



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

Prepared by:



LandUseUSA



seamless collaborative
urbanism + design + economics

Prepared for:



City of Monroe
Monroe, Michigan
Incorporated in 1837

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Executive Summary

In collaboration with its Downtown Development Authority (DDA), the City of Monroe has retained LandUseUSA to conduct a Retail Target Market Analysis (TMA). LandUseUSA has also invited Seamless Collaborative to partner as a subcontractor, and this study has been completed as a combined effort between both firms.

The purpose of this study is to determine the retail market potential for Monroe, and to provide strategies and recommendations for future growth and development of retail trade in the city and its downtown. This Retail TMA is a companion document to a Residential TMA study for the city that is being prepared simultaneously by LandUseUSA. These studies will in turn provide results to inform a long-range vision plan for the downtown and surrounding area, which is being led by Place and Main Advisors.

The next few sections of this report focus on a) Retail Strategies; and b) Action Strategies. The Retail Strategies are built around areas determined in this study to have unmet demand in the regional market. The Action Strategies provide an implementation framework for the Retail Strategies.

The Retail Strategies – Summary

The Retail Strategies include 1) restaurants, eateries (plus a microbrewery); 2) specialty and niche groceries; 3) women's and family clothing and apparel. These three categories are currently underrepresented in the Monroe market, and there is sufficient market gap to support additional stores. Cross-shopping opportunities in these categories in Downtown Monroe will capture regional shopping traffic, and make the downtown a retail destination. These retailers will also help support the needs of new downtown residents, who in turn will generate additional retail sales.

The Action Strategies – Summary

The Action Strategies include 1) marketing; 2) Placemaking (and PlaceScores); and 3) best business practices. These are important for attracting and retaining successful downtown merchants. The downtown should continuously market to prospective merchants, visitors, and local residents. Placemaking processes should be ongoing to create an enjoyable environment. PlaceScores are a tool that can be used to measure progress relative to similar sized cities throughout the state. Finally, nurturing a culture of good business practices (such as reliable and consistent business hours) among downtown merchants will help build shopper confidence and loyalty to the downtown.

National Chains | Some Cautions

The Monroe retail market includes the City of Monroe plus neighboring Frenchtown Township to the north and Monroe Township to the south. National chain stores have saturated the market in these two competing townships, and particularly along commercial corridors (Telegraph Road and Monroe Street) to the north. Any new chains entering the market are likely to locate proximate to the established big-box chains.

Following national trends, some of the existing national chains in the market will either close or downsize. Closures should not be viewed as market-wide failures, but rather as new opportunities for Downtown Monroe's merchants to recapture market share (see also the discussion on Retail Gaps – Import-Export within this report). Meanwhile, other national chain stores will also enter region with new stores – and they could be viewed as competitive threats.

The development of new retail projects intended to attract national chains is explicitly not recommended for the region. Instead, it is in the best interest of all three jurisdictions to strengthen the downtown's retail core, which in turn will help attract and retain resident shoppers with trickle-through benefits for the region.

If new chains do enter the market, they should fill or repurpose vacant retail space, or rebuild with replacement stores on existing retail pads. This strategy will ensure that big-boxes and shopping centers are not left vacant and dark along commercial corridors. High vacancy rates among existing commercial corridors would undermine the community's overall appearance and character, with detrimental results.

The City of Monroe has recently collaborated with its neighboring townships and the Michigan Economic Development Corporation (MEDC) on a strategy for redeveloping the former La-Z-Boy headquarters site on North Telegraph Road. A creative solution is recommended that follows best place-based design practices. However, new retail space is explicitly not recommended in the project.

Note: A list of brands that might consider opening new stores in the region is provided in [Section B](#), attached to this narrative report. Some of them could represent direct competitive threats to the downtown.

The Small Event Industry

Downtown Monroe holds an opportunity to become a local destination for retail and services in support of small events. Small events organized by local companies may pivot around national holidays (Memorial Day, Labor Day, Veteran’s Day, Christmas, and New Year’s Day); corporate anniversaries; and conferences or other training sessions. Events organized by local families are likely to include special events at places of worship (weddings, funerals, christenings, etc.); schools (graduations, proms, and home coming); and birthdays and anniversaries; Easter, Mother’s Day, Father’s Day, and family reunions.

Downtown Monroe is ideally located along the River Raisin, which could be leveraged to stage special events and attract visitors and residents. There is a compelling opportunity to improve the mix and quality of amenities along the river, particularly along Front Street and extending east toward the I-75 interchange. However, there is a need to program some downtown and riverfront space with formal gardens, public plazas, boardwalks, or other riverfront amenities.

Existing amenities along the river include St. Mary’s Park (with a small band shell and a picnic pavilion); downtown banquet center; public and private marinas; a national battlefield park; and a campground. The downtown also includes an event center, center for the arts, and boutique hotel. These and other venues help support small events. Within this same theme, there is also an opportunity for small businesses, merchants, and restaurants to diversify supporting retail and restaurants.

Personal care salons, gift shops, attractions, and other resources established within Downtown Monroe are summarized in the following lists. Restaurants, specialty food stores, apparel stores, and accessories are given special consideration and addressed in subsequent sections of this report.

Small Event Industry | Existing Salons and Other Services Downtown Monroe, Michigan - 2017

Personal Care Services

Blue Water Spa, Salon
Salon Be Downtown
Victoria Day Spa
Wise Guy (barber)

Other Services

Patzy’s Portraits
Fultz Custom Framing (closed)
Stacy’s Travel Agency
Belle Fleur Florist (closed)

Small Event Industry | Existing Retail and Venues
Downtown Monroe, Michigan - 2017

Event Planning - Retail

Expressions Trinkets
Art Insight Emporium
Manny's Gifts
Baroque Violin Shop
Barn Owl Studio
Art Insight Emporium
Serendipitous Vintage

Event Planning - Venues

BB Event Center – Meeting Space
River Raisin Center for Arts
Monroe Co. Historical Museum
Monroe Co. Labor History Museum
Hotel Sterling – Guest Accommodations

With small event planning as a consistent and underlying theme, the retail strategy for Downtown Monroe focuses primarily on three primary retail categories: 1) restaurants and eateries; 2) specialty and niche groceries; and 3) women's and family apparel. This strategy is explained in the following pages, and is also detailed among exhibits in [Section C](#) attached to this narrative report.

Complementary retail opportunities also addressed with additional opportunities for home décor, office equipment, and related "hard line" categories. Recent closures like Fultz custom framing and Belle Fleur should not be viewed as indications of insufficient market support. Rather, they represent unmet opportunities for new merchants to fill market gaps. Ideally, any new merchants will also follow best business practices and build customer loyalties with a focus on convenience, unique merchandise, high service levels, and steadfast reliability.

1. Retail | Restaurants, Eateries

Downtown Monroe has a few popular, quality restaurants that could be leveraged to provide a more diverse range of dining experiences. Creative entrepreneurs and chefs are needed to develop new menus and create unique venues in the downtown, which will establish it as a destination for eating out. The downtown currently has two Hispanic restaurants (Amaya’s and Senor Cactus); one Asian restaurant (Lichee Garden); three sandwich shops (Mancino’s, Norjo, and the Bistro); and five drinking establishments.

Restaurants and Eateries – Existing Establishments

Downtown Monroe, Michigan - 2017

| Downtown Restaurants | Downtown Drinking Establishments |
|---------------------------|----------------------------------|
| Amaya’s Mexican Grill | Beek’s Bar and Grill |
| Mancino’s Grinders | 129 Lounge (and martini bar) |
| Senor Cactus | U and I Bar (and food) |
| Lichee Garden Chop Suey | McGeady’s Town Pub |
| Norjo Café (and catering) | The Uptown Bar |
| The Village Bistro | |
| Nearby Restaurants | Nearby Drinking Establishments |
| Subway | Public House (gastropub) |
| Tiffany’s Pizza | Kelley’s Food & Spirits |
| Tim Horton’s | |
| Erie Bread Co. (café) | |

Restaurants can benefit by clustering together and offering patrons choices and alternatives to national chains. Collectively, they can also achieve some critical mass that helps all of them draw patrons from farther away, and for repeat visits. So, new choices in the downtown should be viewed as complementary reinforcement, and not as competition.

Restaurants can also compete by providing unique cuisine, culinary education, live entertainment, and interactive dining. Examples include theatrical food preparation (sushi bars, brick ovens, etc.); billiards, bocce, bowling, and arcades; interactive touch-screen games; community theater and cultural arts performances; and live music. For cities like Monroe, patrons will also seek outdoor patios overlooking the River Raisin. All of these strategies will help secure the downtown's reputation as a destination for social gatherings, small events, and celebrations.

Microbrewery, Restaurant – An independent microbrewery with an attached restaurant (or a brewpub with an integrated restaurant) is recommended for Downtown Monroe, attracting 'beer tourists' to the area while providing area residents with additional dining options. It could be a new proprietor, or an existing business could expand with a new downtown location. Examples include the Tecumseh Brewing Co., the Original Gravity Brewing Co. in Milan, or the Cotton Brewing Co. in Adrian.

Existing downtown restaurants and bars would be complimented by a new business specializing in locally brewed beverages, and that has a unique identity as a microbrewery, brewpub, beer company, beer exchange, taproom, or similar concept. The requirements of on-site production make a rehabilitated industrial space ideal for a microbrewery or brewpub. Local zoning requirements should be reviewed to ensure that an interested entrepreneur can easily locate in the appropriate space.

Destination Restaurant – A downtown restaurant with a unique concept or theme could generate traffic from local residents while driving visitor traffic to the area. Families, regardless of budget, are seeking unique experiences in addition to quality, diverse menu choices. Four concepts are presented that are feasible in Downtown Monroe and that would most appeal to its target market households and shoppers (see the section on Target Market Analysis below and the exhibits in the attached Sections A and B).

A destination restaurant in Downtown Monroe could be a 'Mongolian BBQ' theme, where patrons create stir-fry dishes from raw ingredients, which are then cooked in a theatric fashion on a large grill. Similarly, in a Japanese Hibachi Grill concept, chefs provide Asian fusion dishes to smaller groups seated around a grill. Another potential is a Brazilian Steakhouse concept, at which patrons are provided a large salad bar and unlimited portions of grilled meat, carved at the table by staff, for a fixed price.

A restaurant serving a conventional menu but with a unique decorative theme could also qualify as a destination restaurant. Examples operating in the SEM Region include Hard Rock Café (Detroit; music theme) and Ford’s Garage (Dearborn; automotive theme). Typically, a large investment is made in rare memorabilia to compete with the exclusivity of a museum. An entrepreneur in Downtown Monroe could, however, leverage this concept at a lower cost to highlight the area’s history by displaying a variety of artifacts related to the War of 1812, and the paper manufacturing, power generation, and furniture industries.

Sandwiches and Wraps – Downtown Monroe lacks a selection of establishments at which its base of office workers, in addition to retail patrons and visitors, can purchase casual meals with short wait times. Erie Bread Co. is a popular lunch destination, but lacks indoor seating; it could expand to a downtown space with a dining area.

The downtown could support similar concepts that serve affordable sandwiches and wraps, with higher-quality ingredients than found at traditional chain fast-food establishments. A Mediterranean-themed café with take-out service, such as Mr. Pita, Ahmo’s Gyros & Deli, or a new independent establishment, would add diversity of cuisine.

Other international cuisines are underrepresented in the Monroe market, which could add to downtown dining options. These include traditional Italian or Italian-American (that is, a restaurant that doesn’t market itself as primarily a pizza place); seafood (should specialize in serving fresh-caught fish from the Great Lakes); and creole/barbeque (could specialize in smoking meats on-site).

The preceding restaurant concepts would bring additional dining choices to Downtown Monroe in response to regional market gaps. However, as noted previously, the ability of creative entrepreneurs to develop nearly endless dining concepts means that many types and themes of restaurants could be successful in the downtown. Cultivating a diverse selection of dining establishments will encourage these entrepreneurs to gravitate towards Downtown Monroe, generating the critical mass effect discussed above.

2. Retail | Grocery, Specialty Food

Existing grocery stores in the Monroe region offer a conventional selection of packaged food, produce, meat, and deli items. There is no grocery store within a five minute walk of the downtown. The nearest grocery store is Kroger store in Monroe Charter Township, which can be reached within a ten-minute walk. This Kroger has recently been renovated, but its merchandise mix still does not include the specialty and organic food selections available at many newer Kroger stores throughout Michigan.

Existing merchants in Downtown Monroe are offering a range of specialty foods and grocery niches. There are two sweet shops, a cigar shop, herb store, coffee & tea shop, doggy bakery, and caterer. There is also a cake bakery just north of the River Raisin and a bread bakery just south of the downtown. Contemplation of the list will reveal that many already support the strategy of building Downtown Monroe’s reputation as a destination for social gatherings, small events, and celebrations. Sweets, cigars, caterers, coffee & tea, and bakeries all help support the theme.

Specialty and Niche Groceries – Existing Businesses Downtown Monroe, Michigan - 2017

| Downtown Establishments | Downtown Establishments |
|---------------------------|------------------------------|
| Cravings Sweets | Susie’s Sweets & Eats |
| Health Matters Herbs | Hippie Chick Herbal (closed) |
| Cigars & Conversation | Scally Waggs Doggie Bakery |
| Norjo Catering (and café) | Agua Dulce Coffee & Tea |
| Nearby Establishments | |
| Cakes by Stephanie | |
| Erie Bread Co. (bakery) | |

These concepts can be leveraged to add a small downtown grocery store that is truly unique from Kroger, Danny’s Fine Foods, Meijer, and Walmart. The store would also help draw cross-shoppers for the existing merchants listed above.

Collectively, niche grocery stores can work together to establish Downtown Monroe as a destination for specialty foods that support small events. These strategies can also generate cross-marketing opportunities local artisans, catering companies, interior designers, florists, and event planners. The shopping experience and customer loyalties can also be promoted through special marketing events, such as bottling parties, wine tastings, culinary classes, and food samplings.

The ideal merchandise mix could include specialty meats (jerky, venison, dried fish, etc.); artisanal meats and cheeses (sausages, deli, etc.); fresh produce; vinegars, oils, and spices; edible flower arrangements; organic and GMO-free products; dried bulk foods (beans, nuts, etc.); local artisan products; Michigan-sourced (hand-made, grown, or raised), and a limited selection of international foods (Asian, Mediterranean, Middle Eastern, Hispanic, and European). It should also include a variety of craft and imported beer, and international wines and Michigan wines.

Specialty grocery categories can be served by adding additional locations for established operators; or by incubating new and independent proprietors. For example, Boulevard Market in Tecumseh and Westborn Market in Dearborn could be recruited to open new stores in Downtown Monroe. Existing merchants could also modify their product mix to meet some of the need and compete with new merchants. For example, Health Matters could reconfigure its store layout to provide a selection of organic, locally-grown produce and fresh herbs.

As another example, Beef Jerky Unlimited could expand its brand by adding a store in Downtown Monroe. Alternatively, it could rent display space in an existing storefront to showcase its specialties and attract new orders.

Downtown grocery stores are also important when considering the market potential for attached housing units above street-front retail in the downtown, and in infill locations nearby. New residents in flats, lofts, and townhouses will help generate market support for specialty grocery stores – particularly if they are located within easy walking distance.

3. Retail | Clothing, Apparel

There is a need for expanded apparel choices, particularly uniforms and women’s apparel, in the Monroe market. The closure of Monroe Factory Shops, and the ongoing departure of chain apparel retailers from The Mall of Monroe, has increased this need. Downtown Monroe is fortunate to have Jones for Men, a high-quality, established men’s apparel store that also rents tuxes. Jones, Martin’s Shoes, and three jewelry stores collectively help provide choices that support the theme of special events and celebrations.

Apparel and Accessories – Existing Establishments
Downtown Monroe, Michigan - 2017

| Downtown Apparel | Downtown Accessories |
|-------------------------|-------------------------|
| Jones for Men | Martin’s Shoes |
| Run Hip Fitness Apparel | David’s Jewelry |
| Second Chance Boutique | Diamond Designs |
| Thrift Shop Association | Frenchie’s Fine Jewelry |

Events and Celebrations – A targeted strategy of clustering new apparel stores in Downtown Monroe can leverage the existing draw of Jones for Men, and create a new cross-shopping destination within the category. With smart retail recruitment, Downtown Monroe could once again become a destination for family apparel – particularly formal wear and party dresses that shoppers will seek for small events and celebrations.

“Take it Back” – The departure of some chain stores like American Eagle Outfitters and Target from the local market has created an opportunity for a new entrepreneur to locate downtown and fill the gap. This new opportunity for downtown merchants could continue to grow if any of the national chain or big-box formats close in the market. Downtown Monroe’s smartest strategy is to seize the opportunity now and ‘take back’ the market.

Competitive Risks – National brands like Dressbarn, Lane Bryant, Burlington Coat Factory, Marshall’s, and Stein Mart might consider opening new stores in the market to meet some of the market gap in women’s and family apparel. Unfortunately, they are more likely to cluster with existing chain stores like Maurice’s and TJ Maxx, which are located in Frenchtown Township.

Specialty Women’s Apparel – The Monroe market has a limited selection of specialty women’s apparel retail. One or two independent merchants could locate downtown with a focus on style-conscious apparel and accessories at moderate price points. Sofi Stella Boutique in Monroe Charter Township, and Ragazza Boutique in Sylvania, are examples of proprietors deploying these concepts, and could be recruited to relocate or expand downtown. There is also a need for moderately-priced and fashion-conscious clothing and accessories in the market.

Formal Wear and Bridal – There is a need to recruit a merchant that specializes in women’s and young girl’s party dresses and dress shoes. A store like Brides Unlimited in Monroe Charter Township, All Together Bride in Adrian, or a new independent entrepreneur should be recruited to relocate or expand with an additional store in the downtown. Potential merchants should include children’s and teen party/prom dresses as a component of their merchandise mixes.

Uniform Store – Monroe’s two uniform stores closed in 2015, creating a need for this niche category in the region. Raven Rock Workwear, located in The Mall of Monroe, experienced a corporate bankruptcy in which it closed all stores throughout the Midwest. The Uniform Outlet was the last inline tenant at Monroe Factory Shops (see discussion above), and moved its store to the Tanger Outlets in Howell.

The concentration of health care and manufacturing employees in the Monroe region indicates demand for a store selling specialty apparel merchandise such as medical scrubs, heavy-duty outerwear, and steel-toed boots. A uniform store should also sell professional accessories including stethoscopes and tool belts. This store could locate downtown, operated by an existing regional business such as Discount Uniforms & More, or a new entrepreneur.

Scrubs & Beyond and Work ‘N Gear are two examples that would probably choose locations in Frenchtown Township, but might also consider alternative store fronts in Downtown Monroe. They occupy smaller floorplates than other chain apparel retailers (a typical store includes 3,000 square feet), which means they may locate downtown under exceptional circumstances.

Chain retailers specializing in “gently used” fashion-forward clothing and accessories, including Plato’s Closet and Savers, may expand to Frenchtown Charter Township retail nodes. Their entry to the market would be a threat to the consignment clothing shops operating in Downtown Monroe.

It is important new merchants work to create compelling window displays and organized, appealing store layouts. They should make efforts to procure gently used brand-name apparel whenever possible, and merchandise it separately on the sales floor.

4. Retail | Other Categories

In contrast to restaurants, food service, and apparel (which focus on basic needs), the remaining retail categories, with one exception, are intended to support the lifestyle preferences of regional residents (see the section on Target Market Analysis below and the exhibits in the attached Sections A and B) and visitors alike. For example, residents and visitors voluntarily seek out opportunities to shop for collectibles, home furnishings, art, and similar goods in their free time.

Hardline Retail Categories – Existing Establishments Downtown Monroe, Michigan - 2017

| | |
|-------------------------|------------------------------------|
| Lifestyle Stores | Furniture, Appliances, Electronics |
| Jack’s Bicycles | Durocher’s Furniture, Appliance |
| Whiting Sewing Center | MetroPCS Communications |
| Book Nook New & Used | B&L Office Machines |
| Thrift Shop Association | Sieb Plumbing, Heating, Air |
| Scally Waggs Pet Store | Thompson’s Computers |
| | Manny’s Computer Repair |
| | Glass Doctor |

Opportunities for additional retailers are described below and general order of need and ease of implementation. To begin, there is significant regional gap in the home décor, kitchen supplies, and business support services. Lifestyle retail categories are also been identified from the analysis of market gaps. All of the categories described below can thrive in a healthy downtown by leveraging cross-shopping and pedestrian traffic a unique and enjoyable shopping environment.

Home Décor and Kitchen Supplies – The Monroe region includes a variety of furniture stores, clustered on North Telegraph Road and South Monroe Street. The selection of complementary home furnishings stores in the market specializing in home décor is limited. Downtown Monroe is fortunate to have Durocher’s Furniture & Appliances draw customers from the effective trade area. Durocher’s should, if space permits, expand its selection of home furnishings to complement its furniture selection.

A new and independent merchant would benefit from proximity to Durocher's, and should offer enhance the category with a new selection of specialty wall décor items, pillows, accent lighting, and storage containers. A specialty store focused on kitchen supplies would complement a home décor store while supporting the local food service industries.

At Home (previously Garden Ridge), HomeGoods, and Kirkland's are national chains in this category that may expand to the Monroe market in the next five years. The City of Monroe should anticipate that they will seek sites in the local market over the next five years along established commercial corridors in Frenchtown Township.

Office Supplies, Printing, Shipping – Downtown Monroe includes a cluster of professional business that generate some support a new establishment that provides business support services. Services should include packaging, mailing, and shipping services; plus some electronic office equipment (and perhaps a small selection of resale office furniture); electronic equipment (printers, scanners, cameras); and basic supplies like ink cartridges, paper, and specialty catalog items. A FedEx Office, UPS Store, Mailboxes Etc., or similar brands would be good candidates.

The Wrapped Gift, located in Monroe Charter Township, is a gift and novelty shop that also provides printing and shipping services. It is, however, located on South Telegraph Road, nearly two miles from downtown. Fostering its expansion into the downtown would meet these two identified needs. There is an opportunity for this business to expand to a small downtown location, offering a tailored selection of gift and novelty merchandise in addition to printing and shipping services.

Artisan Gallery, Picture Framing – There is potential for a unique, Michigan-themed artisan gift store and gallery in Downtown Monroe that can leverage the area's history, proximity to the River Raisin National Battlefield Park, and local art and artisan culture. The Monroe County Museum currently includes a small gift shop, which could partner with an interested entrepreneur to display a selection of its merchandise in this store. Heart of Michigan in Howell may be a candidate to expand to Downtown Monroe, or an independent entrepreneur with knowledge of the local history and art scene could establish a new business.

The closure of Fultz Gallery & Framing in 2016 (the proprietor retired) has created a need for picture framing services in the city. An existing artisan gallery could meet the need, or it could be combined with a gift shop. Art Insight Emporium, Barn Owl Studio, and Serendipitous Vintage are all good candidates for adding framing services.

Toys, Games, Puzzles – A specialty store focusing on toys, games, and puzzles could be supported in Downtown Monroe, potentially locating in the area of East Front and Wadsworth Streets. This block of East Front Street currently includes Serendipitous Vintage, and clustering lifestyle-based stores here could position the block to be a unique environment within the downtown.

Our House Games, a specialty board game and hobby store, had a storefront on this block prior to its relocation to Monroe Charter Township. With new opportunities for cross-shopping, its return to the area could be fostered, possibly as a small expansion in collaboration with other merchants.

Novelty, Collectibles – A specialty store focusing on comic books, novelties, or other related vintage collectibles could be supported in Downtown Monroe. This could also be a new or used record store, specializing in vinyl LPs. This genre of merchant should also locate in the area of East Front and Wadsworth Streets.

Artisan and Party Supplies – An artisan supply store, trading in art and craft supplies, paper goods, greeting cards, and locally-made goods including soaps, glassware, and souvenirs, would complement downtown art galleries and meet local lifestyle preferences. Similar stores of this type in the region include Found Gallery and Rock Paper Scissors in Ann Arbor.

The closure of Dollar & Up Party Supplies on North Telegraph Road has left the Monroe region without a year-round store specializing in costumes, party favors, and accessories. The gap is partially filled by seasonal stores appearing around Halloween in vacant retail spaces, and by chain craft stores (Pat Catan’s, Hobby Lobby) in Frenchtown Township. An independent entrepreneur locating in Downtown Monroe could benefit from cross-shopping with other merchants already supporting the small event industry.

Party City is a national chain specializing in party supplies that may locate to Monroe’s effective trade area in the next five years. It would likely seek a highly visible location near similar chain merchants (such as Hobby Lobby or Pat Catan’s Crafts) on an established commercial corridor.

Florist and Event Planner – There is also a need to replace the downtown Belle Fleur florist and gift shop that recently closed. Complementary merchandise could include edible flower arrangements (a specialty food category), home décor, interior design services, and event planning services.

The Action Strategies

In this section, several action strategies are presented to complement the retail strategy. To cultivate a good variety of successful downtown merchants, it is important to develop and implement a marketing strategy; follow a Placemaking process; and adhere to smart business practices. The following sections of this report describe these strategies in more detail; they are also summarized in the tables in the attached [Section C](#).

1. Action | Marketing

Engage with Potential Visitors – While marketing downtown attractions and businesses through print and online materials is essential, potential visitors are more likely to make an unplanned trip downtown if it is personally promoted to them. The DDA and local merchants should make efforts to develop personal relationships with staff that work at those places in the region, which capture a significant amount of visitor traffic. These include:

1) Northbound I-75 Pure Michigan Welcome Center – The Pure Michigan Welcome Center is located at the first northbound rest area on I-75 in Michigan. It is designed to be a welcoming gateway to the state, and is staffed during business hours with outgoing, professional, and knowledgeable people. Over 30,000 vehicles on average pass this rest area daily (see traffic counts in the attached [Section AA](#).) The exit for Laplaisance Road (signed for Downtown Monroe) is immediately north of the rest area.

Promotional print materials and brochures are available at the welcome center for cities, counties, and attractions throughout the state. While promotional materials for Monroe and Monroe County businesses and attractions are available here, they are filed alphabetically, and not readily findable. The DDA, in partnership with the County Tourism Bureau, County Chamber of Commerce and the city, should consider sponsoring an endcap with an expanded selection of promotional materials that is easily visible to welcome center traffic.

These groups, as well as downtown merchants, should make personal contact with welcome center staff, discussing downtown shopping, dining, and cultural opportunities. With solid knowledge of community amenities, welcome center staff will be inclined to direct motorists who inquire about local shopping and dining to the downtown.

2) River Raisin National Battlefield and Sterling State Parks – Similarly, the DDA, County Tourism Bureau, city staff, and local merchants should make personal contact with visitor center staff at the River Raisin National Battlefield and Sterling State Parks. They should provide local marketing materials, and ensure Downtown Monroe is being recommended to visitors as a venue for further cultural opportunities, as well as shopping and dining. They should ensure that visitors are being given proper directions to the downtown, in the absence of adequate signage and Placemaking processes in this area (please see further discussion below).

3) Hotels, Motels – The DDA, County Tourism Bureau, city staff, and local merchants should request meetings with management and concierge staff at local hotels to convey the same information discussed previously regarding shopping, dining, and cultural opportunities downtown. These parties should be sensitive to times of the year when hotel occupancy in the area is anticipated to be high, and make sure hotel staffs (which may be subject to high turnover) have up-to-date information.

For example, summer races at the Michigan International Speedway in Brooklyn increase demand at Monroe area hotels. These visitors must travel through Downtown Monroe to access the M-50 highway, and are a group to whom downtown amenities could be advertised.

Have an Available Presence Downtown – The Monroe County Tourism Bureau is located in the storefront at 103 West Front Street. It has compelling window displays and advertises free Wi-Fi for visitors. During our two site visits to Monroe in January 2017, multiple attempts at various times of day were made to visit this office during advertised business hours. While lights and a television were on in the lobby, the door was locked, and ringing the doorbell elicited no response. It is important that this office be adequately staffed and available to visitors during posted operating hours.

The DDA could develop a downtown welcome center in a vacant storefront to provide an additional source of local information to visitors. This facility should include free public restrooms. The City of Allegan, in the southern shoreline area of west Michigan, developed such a facility in 2016 with the assistance of a Michigan State Housing Development Authority (MSHDA) grant through the Michigan Municipal League's (MML) PlacePlans program. It is staffed by the Allegan Area Chamber of Commerce and serves as a 'concierge' for downtown and area visitors.

Engage with Potential Businesses – The DDA and Monroe County Business Development Corporation (BDC) should engage in phone calls and personalized visits to potential tenants, including existing stores identified for potential relocation; entrepreneurs and cottage industries; and businesses in the region that might be interested in opening a second location.

Reach out to Incubated Entrepreneurs – Contact entrepreneurs throughout the region and that are operating small businesses in non-retail, rural, or fragmented locations. Work with incubated and recently closed businesses to find them traditional retail space in Downtown Monroe, perhaps even sharing space with other businesses. A few examples include:

- Cookies by Stephanie
- BeautiControl
- Discovery Toys
- Academia Text
- ESP Engraving Services
- VisArG Visual Arts Gallery

Reopen Closed Concepts – Small businesses that have closed are not necessarily indicators of limited demand, and could actually represent opportunities for new proprietors with updated business models. Reopen closed businesses and concepts that may represent opportunities for new proprietors, particularly if they align with gaps. A few examples include:

- Produce Fresh Market
- Fultz Gallery & Framing
- Candles by Cottonwood
- Flour Garden
- Britches & Bows Children’s Boutique
- Health Food Center

A more detailed inventory of recent business closures in the region is provided in the exhibits in the attached [Section D](#).

Online Marketing – The DDA website is easy to find, modern, comprehensive, current, and has a good social media presence. This presence is a regional asset and competitive advantage that should be continued and sustained long-term.

The County Tourism Bureau’s website is cluttered in appearance, and lacks organization and up-to-date information. It should be redesigned to have a modern appearance and be mobile device-friendly.

2. Action | Placemaking

Placemaking Definition – Above all, Placemaking is a process. As defined by MSHDA and Michigan State University’s Land Policy Institute (MSU LPI), it is “the process of creating quality places where people want to live, work, play, shop, learn, and visit.” A Placemaking process can have physical, economic or programmatic elements, and successful Placemaking processes usually combine these elements. According to advisors at the Michigan Municipal League (MML), “successful Placemaking is a strategic, dynamic approach to community and economic development based on an individual community’s strengths.”

While a detailed discussion of Placemaking is beyond the scope of this report, please see the section of this narrative discussing PlaceScores below, and the exhibits related to PlaceScores in the attached Section A for further information about Placemaking.

Stakeholders may be interested in studying the *Placemaking as an Economic Development Tool*, which is a comprehensive guidebook written by senior staff at the MSU Land Policy Institute in collaboration with the MIplace Partnership. A copy can be ordered through the following URL: <http://landpolicy.msu.edu/resources/pmedtguidebook>.

The River Raisin Heritage Corridor and East Master Plan - The City of Monroe is currently developing plans to significantly improve the Front Street Corridor, which could open new opportunities for riverfront amenities while drawing traffic from I-75 and into the downtown. Depending on the project design and successful implementation, it could be transformative for the city and downtown.

North and South Gateways – Improvements are also recommended for the north and south gateways, including signage or wayfinding, screening of vacant commercial properties, illumination to convey safety, and diligent maintenance.

Monroe PlacePlan - Implementing the “Heart of Monroe PlacePlan” could also help transform the downtown while creating public space for residents and shoppers. A program to develop public art and murals on blank exterior building walls could be expanded from the alley (the focus of the PlacePlan) into other downtown areas. An exhibit is included in the attached Section E with a photo collage of buildings that could be ideal candidates for future murals.

Restoration of Vintage Retail Signs – Downtown Monroe includes many examples of mid-20th Century commercial signage. The DDA and/or city should offer grants to property owners to rehabilitate and preserve existing legacy commercial signage. While once common, these metal and neon signs are now viewed as artistic, and their presence contributes to a sense of place downtown. For example, the Rexall Drugs sign, located until recently at 101 South Monroe Street, was a unique downtown element, and efforts should be made to prevent the loss of remaining signage in the future. The attached exhibit in [Section E](#) provides photographs of legacy commercial signage.

Farmers’ Market Strategy – The DDA and city should develop a strategy for the future of the Monroe Farmers’ Market facility. The current location of the market, and the building’s physical condition, do not maximize its potential to supply fresh produce and artisan goods to the community.

Farmers’ markets are a built-in business incubator in a community, with low barriers to entry for artisan producers of non-potentially hazardous foods, crafts, and art. Markets with adequate space can offer cooking classes and demonstrations, live music, and other creative programming. In addition to providing a unique shopping experience and diversifying the downtown merchandise mix, a well-designed market facility can foster a sense of community as well as a sense of place downtown.

A community visioning session should be held that addresses the number of merchants, mix of food and merchandise, and programming desired at the farmers’ market. This exercise should also explore alternative locations within Downtown Monroe for a new facility, including the south riverfront area. A collaboratively developed community vision for the future of the farmers’ market can be used to develop a detailed plan for design, marketing, and funding a new or upgraded facility.

Consider a Form-Based Code for Downtown – The city, in partnership with the DDA and local stakeholders, should consider a form-based zoning ordinance for the downtown area. A form-based approach to zoning (as opposed to a traditional use-based, or Euclidean, approach) gives downtown stakeholders and potential investors a clear and predictable guide to land use regulations, which is graphically oriented and easily understood.

A form-based approach to zoning uses design standards regulating building form (height, massing, setback), and public spaces (streets, plazas, civic spaces). Land uses may be regulated by the code, but are not the primary organizing factor. A community-sourced vision for the future of an area, developed through the charrette process, determines the desired context (“look and feel”) of an area that can be achieved through the code.

Form-based codes are increasing in popularity, having been adopted in 16 Michigan communities as of January 2017. While an in-depth discussion of form-based codes is beyond the scope of this report, stakeholders may find further information at the Form-Based Codes Institute (FBCI), at <http://www.formbasedcodes.org>.

3. Action | PlaceScores™

Introduction – Again, Placemaking is a key ingredient for achieving Downtown Monroe’s full retail market potential. With that in mind, we have completed considerable internet research to evaluate the success of Downtown Monroe relative to other places throughout Michigan. PlaceScore™ criteria are tallied for a possible 30 total points, and based on an approach that is explained in the attached Section A.

Today, the city has an overall PlaceScore of 22 points out of 30 possible, which is moderate and could be higher. The following list provides some strategies that could be used to achieve a higher score of 25 points or more.

PlaceScore Strategies | Downtown Monroe

1. Pursue a form-based or unified code for the downtown, and facilitate a public charrette.
2. Prepare a downtown master plan or subarea plan, and use it to guide reinvestment projects.
3. Participate in the Michigan Main Street Program and following its 4-point approach.
4. Include downtown maps and merchant lists on the city website, overlapping the DDA.
5. Increase the downtown’s WalkScore, which is based on walkability to places that are added by that application’s user community (i.e., by pedestrian residents and visitors).
6. Add crosswalks at signalized intersections, plus street improvements for pedestrian safety.
7. Restore remaining one-way streets to two-way traffic.

4. Action | Business Practices

It is not unusual for independent entrepreneurs to explore new concepts and sometimes fail, and for any number of reasons. In fact, it is rare for any successful downtown to retain all of its merchants every year, and particularly in a four-season climate like Michigan's. Independent merchants may close for any wide range of reasons, and even when there is more than enough market support and expenditure potential. Some new concepts simply fail because inexperienced proprietors lack the necessary skills to operate and manage a profitable business.

Small businesses are also more vulnerable than national chains to life-changing events, such as a death in the family, serious accident, or illness. If a national chain loses a store manager, they can easily hire a replacement, or relocate a manager from a sister store. In comparison, if a small business owner retires without a succession plan, then the business is at risk and might need to close.

Ideally, existing and new merchants have skills, experience, and smart businesses sense to achieve a wide range of challenging tasks. This includes ordering and stocking a modern merchandise mix; synchronizing new stock with seasons; balancing merchandise density, depth, and breadth; anticipating and responding to shopper preferences; promoting sales events and cross-marketing with complementary businesses; employing, training, and retaining good workers; paying rents, utilities, taxes, and other fees; balancing the books and reinvesting profits; and negotiating repairs with landlords.

Ideally, every business will a) have direct visibility to traffic; b) be adjacent to at least one other successful business; c) be walkable from a variety of complementary businesses (i.e., not fragmented); d) have window fronts with merchandise displays; e) have adequate illumination to convey safety; f) will have on-street parking that is reserved for shoppers; g) and will maintain reliable and consistent hours of operation that meet shopper expectations.

Many small businesses are easily incentivized into choosing marginal locations with relatively low rents, and often in locations outside the downtown. They then face higher risk of failure and may be good candidates for relocation into the downtown.

All downtown merchants and proprietors should share a goal of maximizing retail sales, profits, and returns on investment. These can be achieved with a combination of loyal resident shoppers, occasional visitors, and online orders. The ultimate goal is motivate frequent and larger transactions by shoppers making purchases in-person, and online.

Best business practices should be followed and adhered to motivate more frequent shopping trips. Loyal shoppers will also bring other shoppers with them (such as family and friends); will extend the duration of their shopping trips; will cross-shop a variety of stores; and will ultimately spend more. In contrast, disappointed shoppers may never return.

For downtown merchants, the best ways to increase shopper traffic are to focus on: a) unique and rotating merchandise; b) convenience (location and parking); c) high service levels; and d) an enjoyable shopping environment (downtown nostalgia, Placemaking). Price is not listed among these strategies, and downtown merchants should not strive to compete with big-box discount stores (like Walmart) on “low price guarantees.” Instead, offer value by achieving the other goals.

To achieve the strategy of generating more shopping activity, individual downtown merchants instead should focus on a unique merchandise mix. They should also routinely reevaluate the store maintenance and cleanliness; facades, signage, and exterior materials; customer friendliness and service levels; window and merchandise displays; branding and online marketing; pedestrian amenities (benches, music, flower boxes, etc.); and related items that all contribute to the shopper experience.

Predictable and consistent operating hours for downtown merchants are important. Efforts should be made to coordinate operating hours among merchants, and all downtown businesses should remain open past 5 PM daily. To compensate for labor costs of expanded late afternoon and evening hours, businesses may choose to remain closed on Mondays if necessary. With consistency, local expectations and shopping patterns will be altered so as to increase evening demand throughout the week.

In addition to providing shopping choices and services, establishments like coffee shops, cafés, barber shops, and art galleries can also serve as informal community meeting places, and they help shoppers feel socially connected. Downtown merchants in these categories should strive to be open into the early evenings (closing no earlier than 9:00 pm). This will help create and convey a downtown that is vibrant and socially active, and will help attract more of the target market households and shoppers.

In addition, the DDA, Chamber of Commerce, and volunteer committees can focus on a variety of strategies designed to help retailers optimize sales and achieve their revenue goals. Strategies usually fall within the Placemaking process, such as streetscape improvements; adding pedestrian amenities; marketing efforts with special events; wayfinding; and façade improvement programs. Again, the common and shared goal is to help create an environment that is enjoyable for working, playing, and shopping, and that will help merchants and businesses achieve the highest possible revenues.

There are also fun and engaging strategies that can be implemented by the DDA to bring its member community closer together, while cultivating best business practices. These strategies cost little to implement, and can result in sales and foot traffic increases for merchants.

- The Competitive Edge – Merchants should strive to compete with big-box formats in four key areas, including: 1) unique merchandise; 2) exceptionally high customer service; 3) convenience with on-street parking and walkability; and 4) enjoyable, nostalgic shopping environment. If these strategies are successfully implemented, then is not necessary to compete with low prices. It also involves a good understanding of seasons with carefully planned promotions, sales, merchandise rotations, and current trends among novelty items.
- Secret Shopper Tours – The DDA should sponsor field trips to other downtowns in the region for Monroe’s merchants to observe and learn from others as a group. Merchants can discreetly become ‘secret shoppers’ and take notes on their regional competitors’ merchandise mixes and merchandising strategies, window displays, and customer service practices.
- Window Display Challenge – The DDA should host a window display challenge for downtown merchants paying a small entry fee. Shoppers would be given ballots at downtown businesses, and encouraged to visit all merchants participating in the contest. The merchant with the best window display, as voted by downtown shoppers, would win the prize money generated by the entry fee. An exhibit in the attached [Section E](#) provides photographs of some engaging downtown storefronts.
- Cross-Marketing – Merchants should intentionally and mindfully observe the merchandising strategies pursued by their neighbors and work together to complement each other ideas. A ‘buddy system’ could be implemented where complementary businesses cross-market each other. For example, customers to Jack’s Bicycles would be encouraged to visit Run Hip during their visit downtown, and vice-versa.

- News Releases – The DDA could also write regular news releases about the downtown, celebrating new store openings and promotions, upcoming events, and interesting personal profiles of business owners. These releases should be sourced to local and regional media organizations, both traditional (newspapers, television, radio) and online (digital media, travel blogs).

Online Retailing and Marketing – The availability and accessibility of online retailing platforms has made it possible for brick-and-mortar retail stores to expand their potential customer base worldwide. In areas with fluctuating seasonal economies, effective online marketing of an independent retail business will benefit both the business owner and the community at large.

The ability to earn a consistent income year-round can allow downtown businesses to stay open, benefitting the life of their communities and contributing to consistent vibrancy in the downtown. A business with unique goods and services can build a following of customers from outside the region, who may then travel to the region to visit in-person.

Our internet research of businesses operating in the Monroe region has resulted in the compilation of a table of independent businesses who are effectively marketing themselves online (see the exhibit in the attached Section C). Online retailing is a necessary component of any bricks-and-mortar retail business, and has its own set of best business practices. Some effective online marketing strategies are presented in the following list.

- Retailers should ensure the look and feel of their websites is modern and up-to-date. Many free platforms are available to create basic websites with modern design templates.
- Retailers should be able to transact business through their websites. Payment should be handled by a secure third party with a known positive reputation.
- Websites should be ‘mobile friendly’ in design. Users visiting the region should be easily able to load a website on a smartphone.
- Retailers should ensure that their business is easily found on major search engines, such as Google and Bing.
- Retailers should geotag the physical location of their stores on Google Maps and Bing Maps to ensure potential customers using GPS technology can easily find them.
- Using social media platforms such as Facebook and Twitter to market a business is an essential part of any advertising strategy. However, these platforms are not adequate substitutes for a DDA website that is easy to navigate with handheld electronic devices.

The Target Markets

A retail target market analysis has been completed for the City of Monroe and that identifies the top lifestyle clusters currently living in the city and spending the most on retail trade. Expenditures are measured based on a) total number of resident households; b) median household income; and c) lifestyle preferences, including propensity to buy consumables and retail goods.

The city's biggest spenders are the "No Place Like Home" lifestyle cluster, which will generate \$22.7 million in retail expenditures annually. Other big spenders include households in the "Rooted Flower Power" (\$21.6 million), "Blue Collar Comfort" (\$21.5 million), and "Aging in Place" (\$19.0 million) lifestyle clusters.

Collectively, the top ten biggest spenders generate nearly \$100 million in annual retail expenditure potential for the City of Monroe, including its downtown merchants. More than half of these expenditures are leaking out of the market and being captured by retailers in adjacent townships and other shopping destinations. When striving to recapture market share, new and existing merchants should consider the market gaps as well as the shopping preferences of the most prevalent households and biggest spenders.

Profiles on these biggest spenders in the City of Monroe are enclosed in Section B, attached to this narrative report. Each profile shows their median household income relative to national averages; tenure (most are home owners), and expenditures on selected retail categories. Their shopping preferences are also described in the following paragraphs. Additional profiles are available upon request, and more detailed descriptions are also available.

Note: The target markets identified below are existing households already living in the city. They tend to be home owners settled in detached houses. In comparison, target markets identified in the companion residential study are new households moving into the city. They are a much smaller group of shoppers and tend to transient renters seeking attached housing formats.

No Place Like Home – These households are not big on brick-and-mortar shopping excursions, but will frequent hardware stores and automotive stores for DIY projects, and antique shops. They are careful consumers who look for bargains before brands at discount department stores, as well as more upscale mall chains. They'll splurge on electronics, camcorders, MP3 players, DVD players and large-screen TV sets and prefer to buy their favorite brands and styles. The influence of the younger members accounts for their tendency to go to bars, comedy clubs and theaters, and the propensity to purchase sports apparel.

Rooted Flower Power – These households are price-sensitive consumers who tend to visit a store only when they absolutely need to buy something, and always look for bargains and not brands. They spend time researching their purchases and are eclectic in their retail tastes, shopping at discount to middle brow stores. Somewhat slow purchasers of technology, they purchase things like books and collectibles from mail order and only use the internet as a library and communication tool. They also will purchase things such as equipment for yoga, tickets to concerts, tools, and gardening and kitchen supplies.

Blue Collar Comfort – If these households go out, it's typically to a movie, antique show, local concert, bar, or casual restaurant. Perhaps surprisingly, they also love to shop and find enjoyment in retail spending. They like the latest consumer electronics and new fashions, and are also big spenders on toys and games. They tend to favor discount clubs and mid-market retailers, and will buy just about every kind of merchandise that can be found in a catalog. They don't limit their shopping to any one store, though, and instead will cross-shop and then hold out for a sale.

Aging in Place – Most of these households are living on fixed incomes, so they tend to be conservative consumers. They will spend money on tools, books, gardening supplies, fishing supplies, TV sets, greeting cards, and arts and craft supplies. They are brand loyal and are more likely to make a purchase with a catalog rather than the internet. For a splurge, they might head to a casino or a mid-scale casual restaurant. This segment is a good consumer of preventative medicine, and don't mind paying extra for drugs not covered by their insurer. At the grocery store, they are health conscious and looking for low-fat, low-calorie, high fiber foods.

True Grit Americans – These households have enough disposable income to enjoy going out, whether it's to a bar, movie or to one of their favorite chain restaurants. They are conservative consumers and will look for products that will stand the test of time. They tend to stick to familiar brands they've used for many years and refuse to be seduced by designer goods sold at high-end retailers. Instead they frequent discount and mid-scale stores. For sports gear, many turn to local stores, and there are few products for athletics and outdoor activities that they don't buy, purchasing things from golf balls to hunting rifles. Not at all health conscious, they search out foods that please the palette at the grocery store.

Infants and Debit Cards – These young families are often found at the local bowling alleys, but don't go to bars, nightclubs, or even the movie theater, and they certainly don't have discretionary income for cultural arts and entertainment. Meals often involve fast food, takeout, or frozen dinners. Shopping is an infrequent leisure activity that includes discount stores, dollar, value, and hardware stores. However, they do buy plenty of toys and board games, and are a strong market for sporting goods – particularly team sports, hunting, target shooting, archery, camping, and fishing gear. They also enjoy collectibles like ornaments and sports memorabilia. They are less likely than average to have hand-held electronic gadgets, and can't afford a health club membership.

Digital Dependents – These households revel in telecommunication devices that allow them to multi-task and bounce between cell phones, iPods, laptops, and video game consoles. They are known to buy sports equipment like skateboards, camping supplies, and racquetball gear. In the marketplace, they have champagne tastes but not the budget, so end up at the discount stores, clearance racks at the more upscale shops. They belong to gyms and are night owls, spending a lot of time at bars, nightclubs, cinemas and theaters, and billiards halls.

Work Approach

The market strategies and retail recommendations in this report reflect a blend of several analytic approaches to the work. Our applied experience in the retail market research and analysis industries, and first-hand knowledge of the Monroe area's local markets, have been supplemented by the work approaches described below.

Quantitative Analysis – This analysis has included a detailed demographic assessment of market size, income, and expenditure potential; a supply inventory and cluster analysis of existing retail choices; a market share (gap) analysis; and a target market analysis of existing and potential consumers. The results of these tasks have been used to identify probable market gaps and opportunities for new retail. The strategy was then adjusted and refined based on additional qualitative work tasks.

Market Visits and Tours – LandUseUSA and Seamless Collaborative both visited Monroe and its surrounding area during several trips in early 2016 and early 2017. These market visits included walking the entire downtown and preparing a detailed photo inventory along each block.

Field Surveys – We visited with downtown merchants, studied their merchandise mixes and store layouts, and took note of their detailed local knowledge. We surveyed and visited retail businesses in Monroe’s neighborhoods and along outlying corridors in Frenchtown Charter Township and Monroe Charter Township. Special attention was given to visiting area supermarkets and food stores, chain retailers, and the Mall of Monroe.

Photo Inventories – Throughout these visits, we took photos of Monroe’s downtown, riverfront area, shopping choices, Placemaking-related amenities, and attached housing formats. This photographic inventory was used to develop photo collages, to build and refine an inventory of existing shopping choices, and to gauge the city’s marketability to new businesses.

Inventory of Retail Clusters – We then prepared a detailed supply inventory and cluster analysis to ensure an objective approach in qualifying potential gaps and opportunities. The detailed inventory is provided in the attached Section D of this report and referenced throughout. The list is clustered by NAICS category, and sorted by general location (city and townships).

Qualitative Assessments – We also relied on considerable Internet research, reviews of master plans and prior studies, aerial photos, and one-on-one phone discussions with key stakeholders. Results have been used to inform the lists of investment opportunities, market assessments, and the PlaceScore™ analysis.

Chain Store Expansion Strategies – We conducted a study of national chain retailers that may intend to open additional locations in Michigan, and we compared them to same-store location strategies in Southeastern Michigan and Northwestern Ohio. Results have been used to identify some chains that may fill gaps in Monroe’s retail market in the coming years.

A Note on Chain Stores – Depending on a community’s local preferences and municipal policies, national chains may be viewed favorably or unfavorably, and this report does not attempt to account for either viewpoint. On one hand, national brands might be viewed as direct threats to the viability of independent merchants and the character of downtown environments. However, they might also be embraced as: a) revenue generators due to new real estate investment, utility usage, and retail sales; b) solutions for filling vacancies, reinvesting into existing infrastructure, and taking relatively good rents; and, c) strategies for providing diverse shopping choices for both resident households and visitors.

Small Business Location Strategies – For some communities, it may be easier for an established entrepreneur to add a second location than recruit an inexperienced speculator to incubate an unproven concept. With this in mind, we conducted a comparative assessment of merchants and local businesses that already have at least one location in the region, and particularly in Tecumseh, Blissfield, Adrian, Dundee, and Sylvania. Results have been used to identify possible opportunities for second locations in Monroe.

Relocate and Nurture Incubated Businesses – We also identified some local businesses that may need some assistance or encouragement to relocate into vacant merchant space, with visibility to shopper traffic. It is not uncommon for small, independent businesses to be incubated in private residences, basements, garages, or remote commercial spaces that lack visibility to traffic and prospective shoppers. Some of these entrepreneurs could be ideal candidates for relocation into traditional retail spaces downtown.

With these work approaches in mind, the following sections of this narrative report begin with a description of the effective trade area; history of the region’s retail landscape; and descriptions of the target market households. This is followed by the retail strategy and action strategies (marketing, placemaking, and best business practices). The final sections include more technical explanation of the market share analysis, import-export analysis, and vacancy rates.

Effective Trade Area

Monroe shares its effective trade area with its neighboring jurisdictions. In particular, it directly competes with Frenchtown Township to the north and Monroe Township to the south. The trade area also includes the eastern portion of Raisinville Township to the west. These jurisdictions must compete for resident expenditure on retail trade and for its fair share of total market.

The City of Monroe has the only traditional downtown in the region; it is centrally located between the two townships; is the most urban and compact; is the county seat; and includes significant frontage along the River Raisin. Its location along the river and other place-based elements give the city a competitive edge over its neighbors.

Resident shoppers tend to gravitate toward retail clusters that offer convenient cross-shopping. Big-box formats leverage these shopping patterns by intentionally clustering together. Unfortunately, the result is often homogenous, strip commercial retail along commercial corridors, and usually with negative impacts on downtowns. This scenario has played out in Frenchtown Township and Downtown Monroe – but there are remain opportunities for the downtown to win back shoppers, diners, and their loyalty.

The Downtown Landscape

Downtown Monroe - A survey of vacancy rates and storefront uses in Downtown Monroe was conducted based on evidence from fieldwork in January 2017. Based on the retail inventory conducted in early 2017, Downtown Monroe currently has an estimated vacancy rate of about 15%, which is a bit high but recoverable.

Some blocks in the downtown have no vacancies, whereas others have exceptionally high vacancies and also fragment the shopping environment. In particular, there is a cluster of empty storefronts on the west side of South Monroe Street. Healthy, thriving downtowns typically have vacancy rates of no more than 10% (and ideally 5% or less), which can be attributed to normal turnover among businesses and merchants.

The downtown also has a high share of storefronts occupied by professional offices or services than for traditional, discovery-types of retail and restaurants. Based on our inventory, about 44% of storefronts were utilized by professional offices and services, and only 35% are occupied by retailers and restaurants. The balance of 6% is occupied by a hotel and cultural arts venues (event center, museums, etc.)

Active Street Uses – While generating rental revenue for property owners and driving traffic downtown, professional uses at ground level do not contribute to active, vibrant street life. In Downtown Monroe, professional offices in ground-level storefronts are clustered on the north side of East Front Street and on the east side of Washington Street, near the Monroe Bank & Trust headquarters building. There is a decrease in vibrancy and foot traffic on these blocks, which could impede development of retail and restaurant uses in vacant space further east along East Front Street. Again, the impact is two-fold: high vacancy rates and spatial fragmentation that pedestrian shoppers are unlikely to traverse.

An Active Use Ordinance for downtown blocks should be considered to prevent future office uses from locating in shopfronts at street level. Such an ordinance could regulate elements including transparency (the amount of street level building façade covered by clear windows) and depth of space devoted to defined active use categories (such as retail, restaurants, theaters, etc.)

Existing offices should be relocated to upper floors as demand increases for downtown retail uses. Transitional vacancies, which may occur, should not be seen as an externality, but rather as an opportunity for expanded retail choices downtown and a growth of vibrant street life. The provisions of an active use ordinance could also be built in to a form-based code for the downtown (see the concluding section of Action Strategy 2 – Placemaking, above). The City of Birmingham has included active use provisions in its Downtown Form-Based Overlay District, which may serve as an example of such an approach.

Other strategies to foster development of retail on East Front Street include extending the streetscape enhancements at the corner of East Front and Washington Streets along the entirety of East Front Street between South Monroe and Macomb Streets; restoring this segment of East Front Street to two-way traffic to increase access; and installing additional wayfinding signage directed at pedestrian shoppers.

A summary of the surveyed downtown storefront usage can be found in the exhibit in the attached [Section D](#).

The Competitive Landscape

The historic pattern of retail investment in the Monroe region mirrors that of many other Michigan communities. The Monroe region's critical mass of retailers was historically located in Downtown Monroe, a pattern that held through the 1950s. By the early 1960s, retailers began dispersing to new strip shopping centers in Monroe and Frenchtown Townships, in locations designed for easy automobile access and ample parking. The Kroger Shopping Plaza on South Monroe Street and the Kmart store on North Monroe Street were the region's first major developments of this type.

New retail developments opened on the North Telegraph Road corridor during the 1970s, with strip center development expanding north to the Stewart Road intersection by 1980. These developments included the Monroe Mall strip center currently anchored by Big Lots, and the Food Town Plaza currently anchored by Family Farm & Home. New retail development on North Telegraph Road progressed north of Stewart Road during the 1980s, 1990s, and 2000s; and culminated with the completion of the Walmart Supercenter and Telegraph Plaza developments in Frenchtown Charter Township (between 2005 and 2008).

In addition to corridor-oriented strip shopping center development, two major shopping centers were built in the Monroe region during the 1980s: the Mall of Monroe and Monroe Factory Shops. In contrast to the region's smaller strip shopping centers, the Mall of Monroe experiences higher vacancy rates and tenant turnover, and the Monroe Factory Shops complex has one retail tenant remaining. These centers are discussed in further detail below.

The Mall of Monroe – Opened by Cafaro Co. in 1988 as Frenchtown Square Mall, this enclosed regional shopping center initially included 620,000 square feet (sq. ft.) of gross leasable area (GLA). Notably, the mall opened with five anchor tenants: JCPenney, Sears, Hills, Elder-Beerman, and a Phar-Mor drug store. An 8-screen Regal Cinemas multiplex, connected to the mall, and a food court were part of the original development.

The Mall of Monroe is located in Frenchtown Charter Township on North Monroe Street, between Stewart Road and Lasalle Road. North Telegraph Road is $\frac{3}{4}$ mile west of the mall, and a connector road known as Mall Road is used to access the mall from North Telegraph. Although North Monroe Street and North Telegraph Road have similar traffic counts (regional traffic counts are provided in the attached [Section AA](#)), the region's major chain retail locations are clustered on North Telegraph.

However, the Mall of Monroe is not visible from North Telegraph Road, so it is disadvantaged in attracting cross-shoppers. Since 2015, GameStop and Olga's Kitchen have relocated from The Mall of Monroe to new outparcel developments at the intersection of North Telegraph and Mall Roads to take advantage of greater visibility.

The Mall of Monroe has experienced steady turnover of its anchor tenants beginning in the 1990s. The 97,000 square foot Hills anchor was sold to Dayton-Hudson Corporation (now Target Corp.) in 1993, and was operated as a Target store until 2015. It was one of eleven underperforming Target locations to close that year, and the building is currently for sale. The 74,000 square foot Sears store closed in 2012, along with 80 other underperforming locations eliminated nationwide. Sears had previously operated in Downtown Monroe between 1937 and 1983.

JCPenney exited the Monroe market in 2004, and its space was later occupied by Steve & Barry's sportswear until that company declared bankruptcy in 2008. The 51,000 square foot space has been occupied by Pat Catan's Crafts since 2014. Elder-Beerman was the mall's only original anchor, and it was rebranded as Carson's in 2009. Elder-Beerman opened a home goods store in half of the former Phar-Mor space in 1995, and it remains in operation under the Carson's name. Old Navy operated as a junior anchor in the mall from the 1990's, but closed in 2008.

An expansion of the Phoenix Theatres cinema from 8 to 12 screens was completed in 2016, subsuming the food court. However, the mall continues to lose nationally branded inline tenants. Since 2015, Aéropostale, American Eagle Outfitters, Christopher & Banks, and DEB Shops have all exited the market, and it is reasonable to anticipate that the others will gradually close under company-wide contraction strategies. Inline spaces at the mall have been repurposed as non-retail uses including an arcade, a children’s play center, and a fitness center. This is a trend that will likely continue as future vacancies occur.

Cafaro Co. offered The Mall of Monroe for sale in 2016, but the listing seemed to end in early 2017. As demand for retail space in regional enclosed malls contracts nationwide, major redevelopment of the property to include a mix of retail, entertainment, office, and residential uses may be needed to prevent it from becoming a “dead mall”. The mall’s loss of niche apparel retailers, in turn, has created a gap in regional supply that can be filled with new merchants in this category locating in Downtown Monroe.

Monroe Factory Shops – Opened in 1987 as Horizon Outlet Center, this regional outlet mall is located on the northwest corner of I-75 and Laplace Road in Monroe Charter Township. The initial phase of the development included approximately 100,000 square feet, and it was designed with storefronts facing an interior courtyard. This configuration limited storefront visibility, and made expansion difficult.

Two subsequent phases were added to the north of the original factory mall in 1989, including: 1) Monroe Premier Plaza with 106,000 square feet; and 2) Harwood Plaza with about 75,000 square feet. In contrast to the original development, the latter two plazas were built in conventional strip-center configurations. The plazas now include facilities for several professional, non-profit, social service, and religious organizations, but the retail space is more than 50 percent vacant.

Horizon Outlet Center was initially a popular regional shopping destination, with a variety of nationally known tenants including Nike, Reebok, Bass Shoes, Van Heusen, Carter’s Children’s Wear, Dress Barn, and Gap. Vacancies increased at the complex during the early 2000s, as newer outlet centers with modern layouts opened in the region, such as the Tanger Factory Outlets in Howell. The decision to locate Cabela’s sporting goods on US-23 in Dundee (opened in 2000) contributed to the trend of decline, as regional shoppers seeking destination retail could not take advantage of cross-shopping opportunities.

The Horizon Outlet Center was renamed Monroe Factory Shops in the 2000s, and then the Great Recession caused a wave of vacancies from which it has not recovered. The surviving inline tenants, Gap Outlet and Uniform Outlet, exited the complex in 2015 and relocated to the Howell Tanger Outlet mall. As-of early 2017, a fireworks store is now the only active tenant in the center.

The original phase of Monroe Factory Shops, owned by a court-appointed receiver, was sold in late 2015 to a Georgia-based developer who has expressed a desire to rehabilitate the center and secure new retail and restaurant tenants. There were no indications of new development underway at the site in early 2017. Prior to the sale, the township had explored rezoning the area for light industrial uses, due to the site's locational advantage as a logistics hub.

In summary, the Monroe region has experienced a shift in its critical mass of retailers away from the historic downtown, similar to other Michigan communities. The center of the region's effective retail trade area is on the North Telegraph Road corridor in Frenchtown Charter Township (see the map of retail business locations provided in the attached [Section BB](#)).

The Mall of Monroe and Monroe Factory Shops were built in the late 1980s during a time of expansion in the retail industry, and have since been negatively impacted by industry consolidation and national economic changes. They each have unique siting and design flaws that exacerbated the effects of these trends. The loss of tenants at the two centers has contributed to gaps in regional merchandise mix that can be met by fostering new retail in Downtown Monroe.

National Retail Trends

This retail analysis for the City of Monroe includes a top-level assessment of retail trends across the nation, in the Great Lakes Region (which includes Michigan), and the State of Michigan. Supporting materials have been assembled in [Section F](#) attached to this report, and key observations are summarized below.

Based on monthly productivity (sales per square foot) over the past twenty years, the State of Michigan is continuing to lag behind the nation. Since 1996, the average productivity for non-anchor retail tenants has increased from \$375 to \$450 across the nation. Retailers in Michigan have generally recovered from the recent Great Recession, but average productivity is flat at about \$350 per square foot.

Based on same-store monthly gross/loss versus prior years, there is evidence that retail sales tend to follow a ten-year cycle, and generally in alignment with past recessions. Although most of Michigan's economy is experiencing growth and continued recovery in 2016, retail sales seem rather sluggish. Meanwhile, if the ten-year cycle is forecast, it would imply that another recession may be looming around the corner, perhaps by the year 2020.

The growing threat of online retailing will continue to negatively impact bricks-and-mortar same-store sales in coming years. The poor year-over-year same-store sales results of major physics retailers for the fourth quarter of 2016, and the trend of retailers downsizing their number of store locations, may result in a period of sustained negative sales growth in the physical retail industry. Unlike previous cycles, this industry contraction may occur outside of a general economic recession.

Many markets across the nation are considered "saturated" with retail, and many companies are now contracting, downsizing, and reducing footprints. The amount of physical retail space outpaced population growth until the onset of the Great Recession, and chain store adjustments are expected to result in improved sales productivities.

The average sales productivity for the Great Lakes Region (including Michigan) is about \$350 per square foot and there is considerable variation between retail categories. Big-ticket items like home entertainment systems, electronics, jewelry, and other fashion accessories are likely to have the highest sales per square foot. High-traffic venues like food courts and restaurants also tend to have above-average performance. Pharmaceuticals, furniture & furnishings, and restaurants have been on the upswing for the past decade; whereas book stores have been undermined by technological advancements.

Retail Gaps, Import-Export

This retail analysis and study includes several supply-demand and gap models that have been conducted for counties and places in the South East Michigan region. Results for all 83 counties in Michigan are used as “standards” with which to compare Monroe County; similarly, results for all cities and villages are used as “standards” with which to compare Monroe.

Market share is a general measure of transacted retail sales per capita as a share of income. In general, if the market share is exceptionally high for any given county (compared to other counties), or for any given city or village (compared to other cities and villages), then it usually indicates exceptional performance in that category, and may also indicate limited gap. If a category has an exceptionally low market share, this could indicate poor performance in the category and an opportunity for new merchants to fill the gap.

Exceptionally high market shares can be attributed to a) lifestyle preferences of local residents, with higher-than-usual levels of spending in niche categories; b) high import by non-resident visitors, and particularly tourists; and c) an exceptionally large number of choices within the category, which can help motivate cross-shopping and maximize spending.

Depending on the category, high performance usually indicates insufficient gap, high levels of competition, and high risk for new businesses. However, it may also point to new opportunities for leveraging local strengths and niches with complementary categories.

The sales analysis tables compare retail sales data across several North American Industry Classification System (NAICS) categories among places in the region, including Frenchtown Charter and Monroe Charter Townships. For NAICS categories where sales data have been reported for these places, a share of net import and export for those places has been derived.

Places with a net import of retail sales in a given NAICS category, as mentioned above, are attracting visitors and tourists from neighboring places and regions to make purchases. Likewise, places with a net export are losing their resident population to competing nearby places to spend their shopping dollars in a particular NAICS category.

For example, the market share for the State of Michigan in NAICS categories 44-45 is estimated at 45.3 percent. This indicates that Michiganders spend, on average, \$45 out of every \$100 in income on goods and services in these categories. A closer comparison of seven places in the Monroe region (Adrian, Dundee, Hillsdale, Monroe, Tecumseh, Frenchtown Charter Township, and Monroe Charter Township) reveals significantly higher market shares of 85.9%.

It would be inaccurate, however, to assume that residents in these seven places are spending nearly \$86 out of every \$100 in income on retail goods and services. Rather, there is a net import of retail dollars to these seven places, taken as a group, from residents and visitors living in the surrounding areas of the region.

Net import (or export) for each place is then compared to others throughout Michigan. For example, among the seven places mentioned above, the City of Monroe has a net export of 52%; and Frenchtown Township has a net import of 25 percent. In general, retailers (excluding restaurants) in Monroe are losing at least half of their expenditure potential to the other places – and retailers in Frenchtown Township are directly benefiting.

The import-export analysis tables are included in the attached [Section G](#). The market share analysis scatter plots are included in the attached [Section H](#) for Michigan counties, and in the attached [Section I](#) for Michigan places.

Other notable findings from these exhibits are summarized in the following bullet points. In the market share analysis, Monroe County is always compared to the set of other Michigan counties, and Monroe is always compared to the set of other Michigan places (cities and villages).

Observations below pertain to both Monroe County and Monroe, to give a complete picture of the regional retail economy.

The import-export analysis includes Frenchtown Charter Township and Monroe Charter Township as further points of comparison. The following list describes some key observations from the analysis.

- Monroe County is underperforming in market share relative to other Michigan counties with similar levels of per capita income in the Furniture and Home Furnishings retail category (NAICS 442).
- Monroe County underperforms in market share relative to other Michigan counties with similar levels of per capita income in the Apparel and Accessories retail category (NAICS 448). Monroe also underperforms in this category relative to other places in Michigan. The import-export analysis shows there is a 39% leakage of retail spending dollars from Monroe in this category, and a 36% net import of retail spending dollars to Frenchtown Charter Township.
- Monroe County performs very well in market share relative to other Michigan counties in the Sporting Goods, Hobby, and Book Stores category (NAICS 451). This can be attributed to the influence of Cabela's in Dundee, which has a large effective trade area and is considered a tourist attraction.
- Monroe County underperforms in market share relative to other Michigan counties with similar levels of per capita income in the Food and Beverage Stores category (NAICS 445). The import-export analysis shows there is a -60% leakage of retail spending dollars in this category from the City of Monroe to its neighbors.
- The cluster of pharmacies and support establishments near ProMedica Monroe Regional Hospital influence Monroe's favorable market share relative to other regional places in the Health and Personal Care Stores category (NAICS 446). The City of Monroe is a net importer of retail spending dollars in this category from the region.

It is important that these businesses do not leave Monroe after ProMedica Hospital relocates its campus to Frenchtown Charter Township. Fragmenting this important business cluster would cause Monroe to lose its competitive advantage in the region.

- The City of Monroe is small import market in the region for restaurant spending dollars (NAICS 7225), with a 6% import. However, neighboring Frenchtown Charter and Monroe Charter Townships export 29% and 64% of their spending potential in this category. Combined with the cross-shopping and critical mass effects generated by clustering restaurants together in a walkable downtown (discussed in the Retail Strategy section of this report), Downtown Monroe can capture a majority of this export from its neighbors.

Monroe County underperforms in market share relative to other Michigan counties with similar levels of per capita income in this category, indicating the region as a whole does not have sufficient dining choices. Rather than being a “zero-sum game”, Downtown Monroe can grow this market potential by adding diverse dining choices.

The market share analysis and sales analysis relies on 2015 (local data) and 2012 (national averages) economic census of trade for southeast Michigan places compared to the nation. The data results have been compared and studied for several industry sectors, including retail trade (NAICS codes 44 and 45); and traveler accommodations (72), which includes hotels and other overnight accommodations (721), and restaurants and other food service categories (722).

The economic census is completed every 5 years, and the most recent 2012 census data were released for Michigan in mid-to-late 2015 (consistent with time lags for the US Decennial Census). Monroe could consider updating this analysis when the 2017 Economic Census data are released (in 2019).

Closing and Contacts

This concludes the Retail Market Strategy and report for the City of Monroe. Questions regarding economic growth, downtown development initiatives, and implementation of these recommendations can be addressed to Jeffrey Green, AICP, at the City of Monroe.

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Questions regarding the work approach, methodology, TMA terminology, analytic results, strategy recommendations, and development implications may be directed to Sharon Woods at LandUseUSA. Stakeholders with questions about the PlaceScore analysis, supply inventory, or refinements can contact Adam Cook of Seamless Collaborative.

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Prepared by:



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urbanism + design + economics

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| Import – Export Analysis | G |
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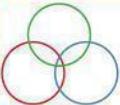


Section **A**
Placemaking

Prepared by:



LandUseUSA



seamless collaborative
urbanism + design + economics

Prepared for:



City of Monroe
Monroe, Michigan
Incorporated in 1837

Placemaking as an Economic Development Tool

PLACEMAKING AS AN ECONOMIC DEVELOPMENT TOOL



mi place

MICHIGAN STATE UNIVERSITY Land Policy Institute

The ultimate guidebook on placemaking. Geared specifically toward Michigan, this guidebook seeks to assist neighborhoods and communities with quickly reshaping their thinking and acting on how effective placemaking will greatly enhance community and economic development.

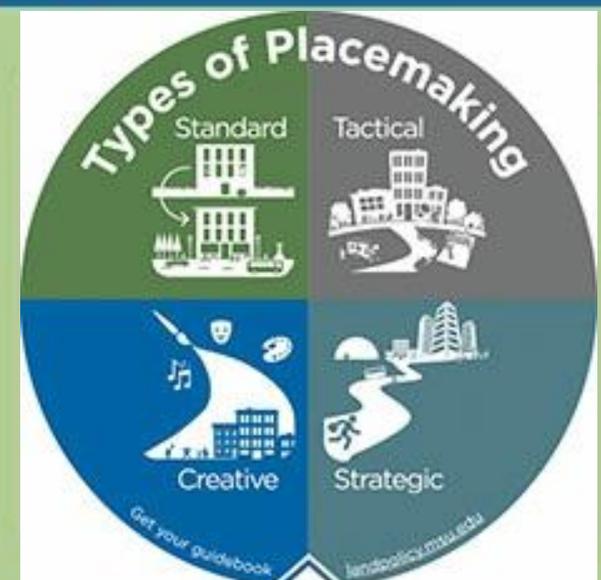
This guidebook includes the research that justifies placemaking, identifies the elements (good form, public engagement) and planning processes of placemaking, regulatory tools to achieve it, and then provides a comprehensive look at each of the four types of placemaking to use to create new quality places in your community.



“Placemaking is the process of creating quality places where people want to live, work, play, shop, learn and visit.”

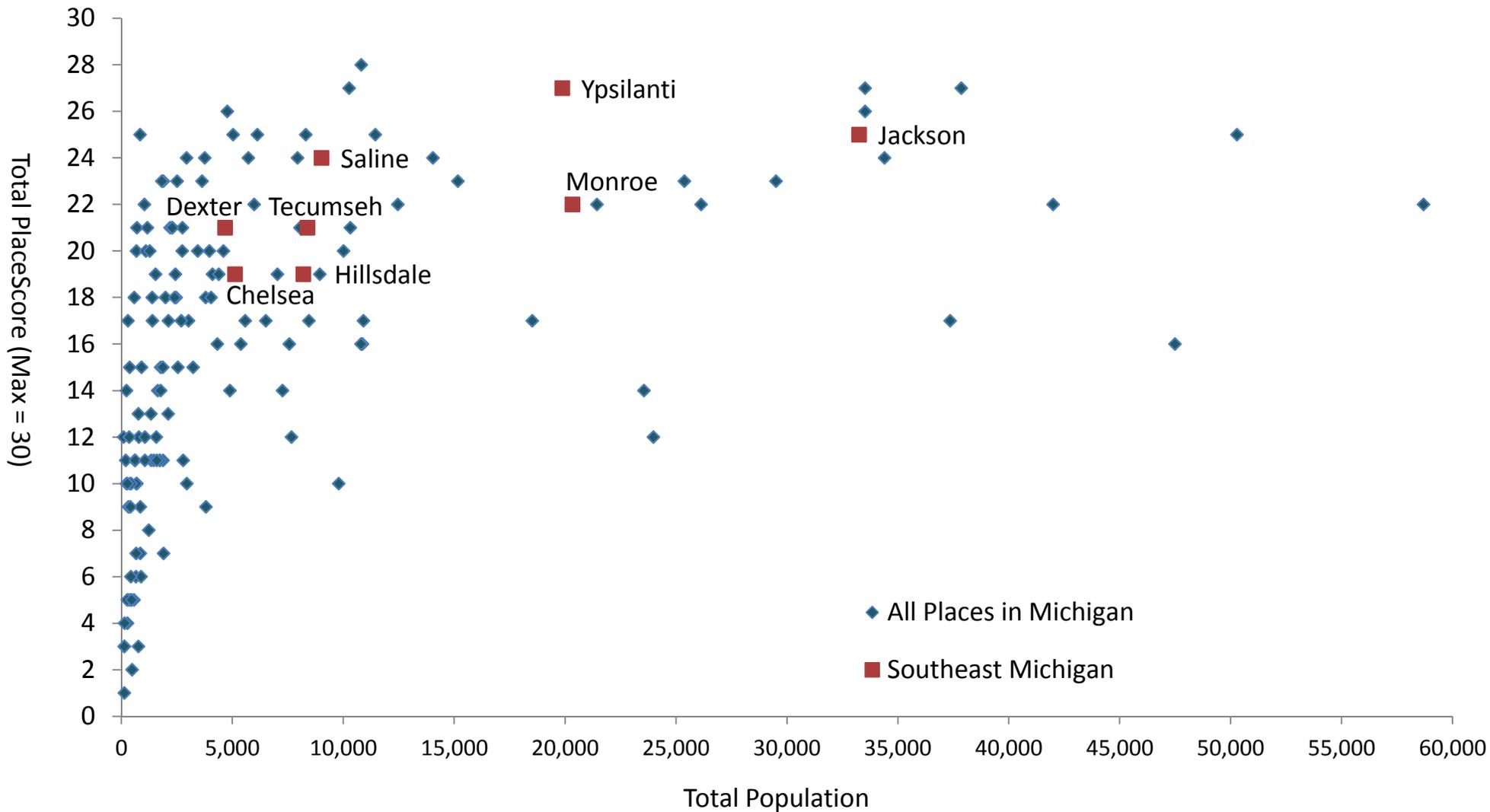
With an emphasis on economic aspects, the guidebook is particularly valuable for Michigan and other Midwest and Great Lakes states that are attempting to reshape their communities to again be competitive for people and workers in the global New Economy.

Appropriate for municipalities of all shapes and sizes. Local policy makers, professionals, civic and business leaders, and others will find enormous value in understanding their role in creating a large number of quality places with a strong sense of place, because PLACE MATTERS!



Available online at: <http://landpolicy.msu.edu/resources/pmedtguidebook>.

Total PlaceScores™ Selected Cities and Villages in the State of Michigan Selected Places in Southeast Michigan Region 9 | 2015 - 2017



Source: Based on a subjective analysis of 30 Placemaking criteria using internet research only, and have not been field-verified. Population is ACS 5-year estimates for 2010-2014. The PlaceScore terms and methodologies are trademarked by LandUse|USA (c) 2016.

PlaceScores™ - Local Placemaking Initiatives and Amenities
 (As evident through Online Search Engines)
 Selected Places | Southeast Michigan Prosperity Region 9

Exhibit A.2

| Place Name | City of Jackson | City of Ann Arbor | City of Ypsilanti | City of Dexter | City of Saline | City of Chelsea | City of Hillsdale | City of Monroe |
|---|-----------------|-------------------|-------------------|----------------|----------------|-----------------|-------------------|----------------|
| 2015 Population (ACS 5-yr) | 33,255 | 116,194 | 19,874 | 4,682 | 9,020 | 5,126 | 8,203 | 20,335 |
| City/Village-Wide Planning Documents | | | | | | | | |
| 1 City-Wide Master Plan (not county) | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 2 Has a Zoning Ordinance Online | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 3 Seeking Form-Based Code, Hybrid | 1 | 0 | 1 | 0 | 1 | 0 | 1 | 0 |
| 4 Parks & Rec. Plan or Commission | 1 | 1 | 1 | 1 | 1 | 1 | 0 | 1 |
| Downtown Planning Documents | | | | | | | | |
| 5 Established DDA, BID, or Similar | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 6 DT Master Plan, Subarea Plan | 0 | 1 | 1 | 1 | 1 | 0 | 0 | 0 |
| 7 Streetscape, Transp. Improv. Plan | 1 | 1 | 1 | 1 | 1 | 0 | 0 | 0 |
| 8 Retail Market Study or Strategy | 0 | 0 | 1 | 1 | 1 | 0 | 0 | 1 |
| 9 Residential Market Study, Strategy | 1 | 0 | 1 | 1 | 1 | 1 | 1 | 1 |
| 10 Façade Improvement Program | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Downtown Organization and Marketing | | | | | | | | |
| 11 Redevelopment Ready Community | 1 | 1 | 1 | 0 | 0 | 0 | 1 | 1 |
| 12 Michigan Cool City Designation | 1 | 1 | 1 | 0 | 1 | 0 | 0 | 0 |
| 13 Member of Michigan Main Street | 0 | 0 | 1 | 0 | 1 | 0 | 0 | 0 |
| 14 Facebook Page | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Listing or Map of Merchants and Amenities | | | | | | | | |
| 15 City/Village Main Website | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 16 DDA, BID, or Main Street Website | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 1 |
| 17 Chamber or CVB Website | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| Subtotal Place Score (17 points possible) | 13 | 12 | 16 | 11 | 14 | 8 | 9 | 11 |

This PlaceScore assessment is based only on internet research, and has not been field verified.
 Analysis and assessment by LandUse|USA © 2017, and may reflect some input from local stakeholders.
 If a community's amenities and resources are not listed, then the challenge is to improve marking efforts,
 and ensure that the resources are available and easy to find through mainstream online search engines.
 The PlaceScore term and methodology is trademarked by LandUse|USA with all rights reserved.

PlaceScores™ - Local Placemaking Initiatives and Amenities
 (As evident through Online Search Engines)
 Selected Places | Southeast Michigan Prosperity Region 9

Exhibit A.3

| Place Name | City of Jackson | City of Ann Arbor | City of Ypsilanti | City of Dexter | City of Saline | City of Chelsea | City of Hillsdale | City of Monroe |
|---|-----------------|-------------------|-------------------|----------------|----------------|-----------------|-------------------|----------------|
| 2015 Population (ACS 5-yr) | 33,255 | 116,194 | 19,874 | 4,682 | 9,020 | 5,126 | 8,203 | 20,335 |
| Unique Downtown Amenities | | | | | | | | |
| 1 Cinema/Theater, Playhouse | 1 | 1 | 1 | 1 | 0 | 1 | 0 | 1 |
| 2 Waterfront Access/Parks | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 3 Established Farmers' Market | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 4 Summer Concert Series | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 5 National or Other Major Festival | 1 | 1 | 1 | 0 | 1 | 1 | 0 | 1 |
| Downtown Street and Environment | | | | | | | | |
| 6 Angle Parking (not parallel) | 1 | 0 | 0 | 0 | 0 | 0 | 1 | 1 |
| 7 Total Reported Walk Score is 50+ | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 8 Walk Score/1,000 Pop is 40+ | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 9 Off Street Parking is Evident | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 10 2-Level Scale of Historic Buildings | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 11 Balanced Scale 2 Sides of Street | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 12 Pedestrian Crosswalks, Signaled | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 |
| 13 Two-way Traffic Flow | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 0 |
| Subtotal Place Score (13 points possible) | 12 | 11 | 11 | 10 | 10 | 11 | 10 | 11 |
| Total Place Score (30 Points Possible) | 25 | 23 | 27 | 21 | 24 | 19 | 19 | 22 |
| Reported Walk Score (avg. = 42) | 75 | 97 | 89 | 61 | 52 | 54 | 83 | 82 |
| Walk Score per 1,000 Population | 2 | 1 | 4 | 13 | 6 | 11 | 10 | 4 |

This PlaceScore assessment is based only on internet research, and has not been field verified.
 Analysis and assessment by LandUse|USA © 2017, and may reflect some input from local stakeholders.
 If a community's amenities and resources are not listed, then the challenge is to improve marking efforts,
 and ensure that the resources are available and easy to find through mainstream online search engines.
 The PlaceScore term and methodology is trademarked by LandUse|USA with all rights reserved.

Evidence of Progress with a Placemaking Process
 The City of Monroe | Monroe County, Michigan | 2017

| | Water Front? | Down Town? | Name, Address, Location | Description and Notes |
|---|--------------|------------|---|--|
| 1 | No | Yes | E Front St at Washington St | Modern streetscaping with brick pavers, street trees, benches, and bike racks. |
| 2 | Yes | Yes | River Raisin south bank | Riverwalk constructed from Harrison St east to Murray Street. The passages between Front St and Riverwalk include decorative signage and lighting. |
| 3 | Yes | Yes | River Raisin | Pedestrian bridge across river connects downtown to St. Mary's Park. |
| 4 | No | Yes | Loranger Square Pavilion (NW corner of E 1st St and Washington St). | Pavilion in important civic location used for summer concerts and gatherings. |
| 5 | Yes | Yes | Downtown Monroe Wine Crawl | Popular summer event with wine tastings hosted by downtown businesses. |
| 6 | No | Yes | 2015 Heart of Monroe PlacePlan North-south alley on west side of S Monroe St between W Front St and W 2nd St. | Placemaking plan facilitated by Michigan Municipal League (MML), Michigan State University (MSU) School of Planning, Design, and Construction, and MSU Extension with funding assistance from Michigan State Housing Development Authority (MSHDA). Design plan and implementation strategy to transform alley into a shared pedestrian space. |

Based on stakeholder input and market research; prepared by LandUseUSA and Seamless Collaborative, 2017.
 This list has not been field-verified and is subject to revision with additional input from local stakeholders.

Evidence of Progress with a Placemaking Process
 The City of Monroe | Monroe County, Michigan | 2017

| | Water Front? | Down Town? | Name, Address, Location | Description and Notes |
|---|--------------|------------|--|---|
| 7 | No | No | 2013 Telegraph Road Charrette | As part of the Resilient Monroe planning process, a charrette was held to develop a plan for the Telegraph Road corridor that would increase pedestrian access and create a sense of place along the corridor. Plans for redevelopment of the former La-Z-Boy headquarters site, Mill Run Park, and two community gateways were also developed. |
| 8 | Yes | Yes | 2013 River Raisin Heritage Corridor - East Master Plan | Planning process involved the City, the National Park Service, and the Monroe Historical Society developing a plan for significant expansion of the River Raisin National Battlefield Park including amenities and corridor improvements. |
| 9 | No | Yes | Memorial Park | Small Peace Garden is being constructed behind Johnson-Phinney Building at 117 Cass St. Park will include a 14-foot tall bronze sculpture celebrating 200 years of peace between the U.S., Canada, and Great Britain. |

Based on stakeholder input and market research; prepared by LandUseUSA and Seamless Collaborative, 2017.
 This list has not been field-verified and is subject to revision with additional input from local stakeholders.



Section **B**
The Target Markets

Prepared by:



LandUseUSA



seamless collaborative
urbanism + design + economics

Prepared for:



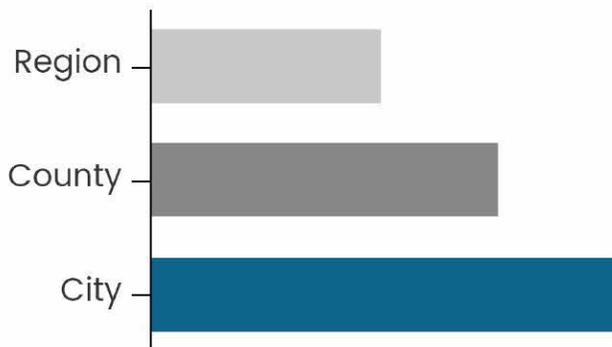
City of Monroe
Monroe, Michigan
Incorporated in 1837

Residential Target Market Analysis

A study of migrating households seeking Missing Middle Housing formats.

Guide to Color-Coded Variables

Variable by Geography

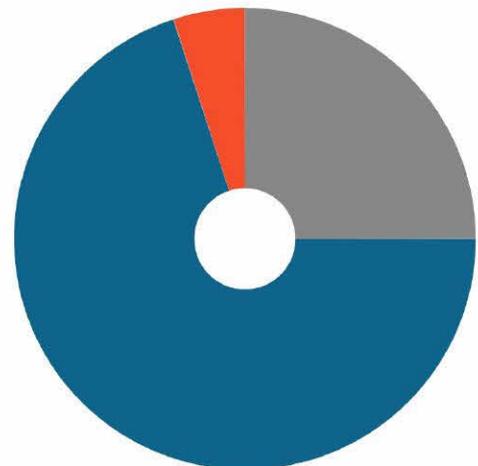


Variable by Gross v. Net



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



Retail Target Market Analysis

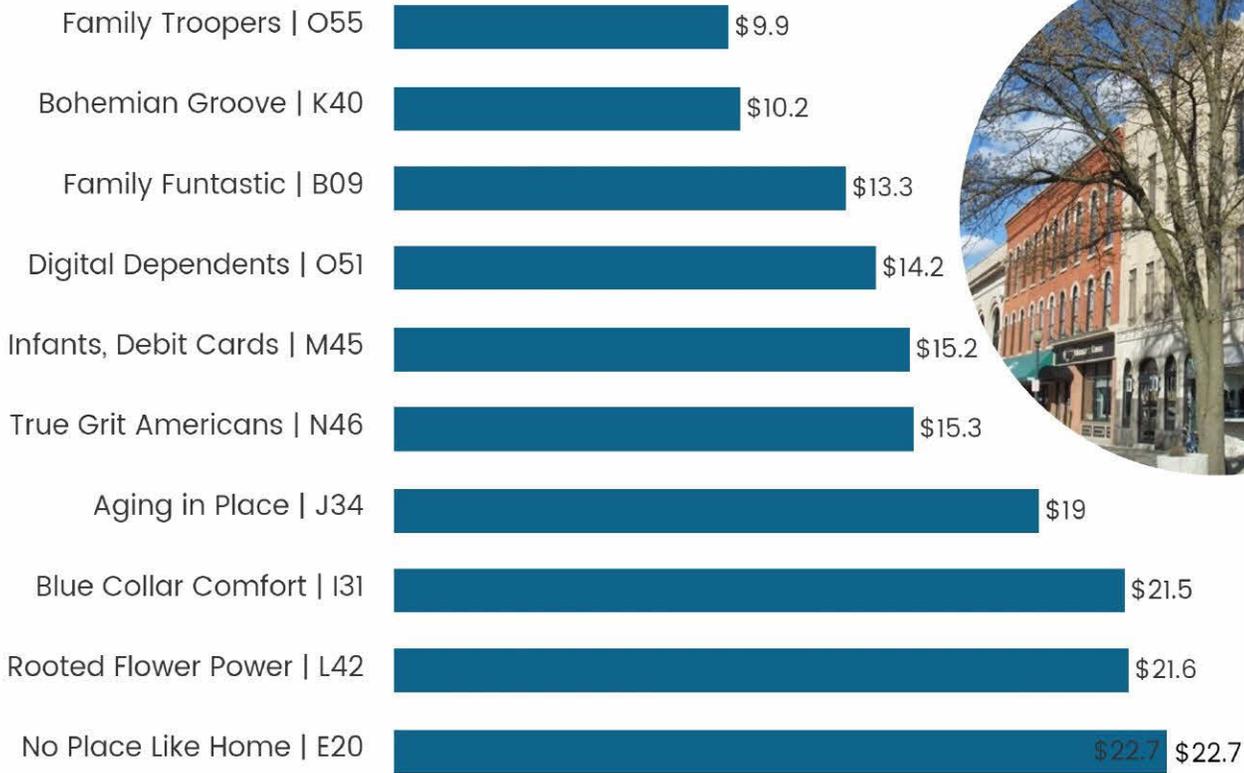
A study of prevalent households that are big spenders on retail.

The City of Monroe, Michigan

Annual Resident Expenditure Potential (\$Millions)

by Existing Target Market

Total Retail Trade | NAICS 44-45



Among the City of Monroe's existing households, "Rooted Flower Power" target market households collectively generate \$21.6 million in annual retail expenditure potential. Similarly, the "Infants and Debit Cards" generate \$15.2 million per year; "Digital Dependents" generate \$14.2 million; "Family Funtastic" generates \$13.3 million; "Bohemian Groove" generates \$10.2 million; and "Family Troopers" generate \$9.9 million. These groups are highlighted because they also have the highest propensity to live in urban places like downtowns and compact neighborhoods. The others are more likely to live in suburban and rural settings.

All of these target markets are prevalent in the city, have moderate-to-better incomes, and are big spenders. The "Family Funtastic" households are by far the most affluent, and those living in the City of Monroe have median household incomes approaching \$75,000 per year. Note: This is a profile of existing households only. Additional profiles of new households moving into the city are provided in the Residential TMA.

The graph demonstrates the expenditure potential of each existing target market, which is not the same as transacted retail sales within the city. The vast majority of the potential is actually leaking (being exported) to adjacent Frenchtown Township to the north, and to Monroe Township to the south.

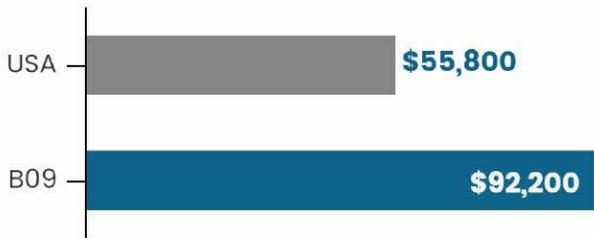
Retail trade includes codes 44 and 45 from the North American Industrial Classification System's (NAICS). It includes automotive dealerships, recreational vehicles, electronics, furniture, sporting goods, home improvement, grocery stores, pharmacies, apparel, and all other conventional and traditional categories. For additional clarification, it does not include overnight accommodations (hotels), restaurants, eateries, or entertainment and recreational venues.



Family Fun-tastic | B09

Lifestyles and Spending Preferences | National Averages

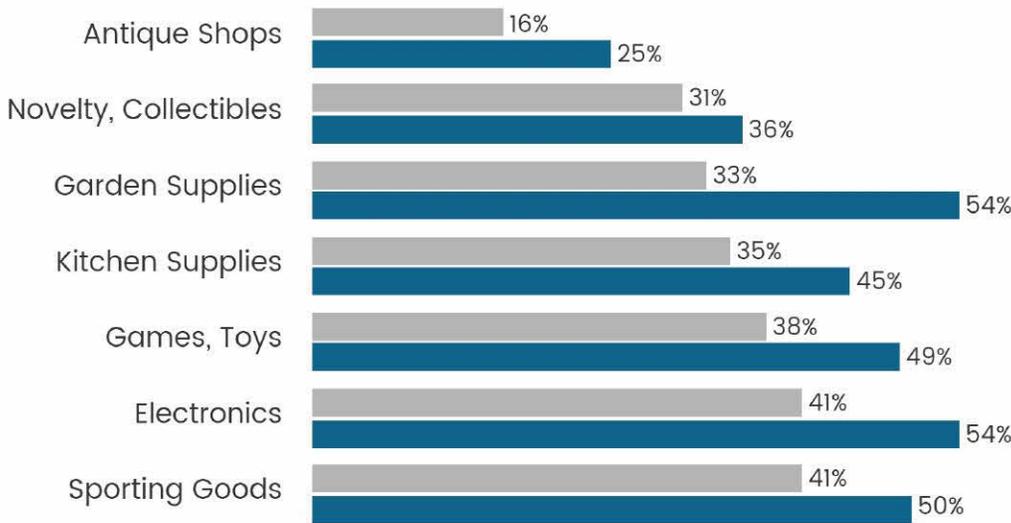
Median Household Income



Average Tenure

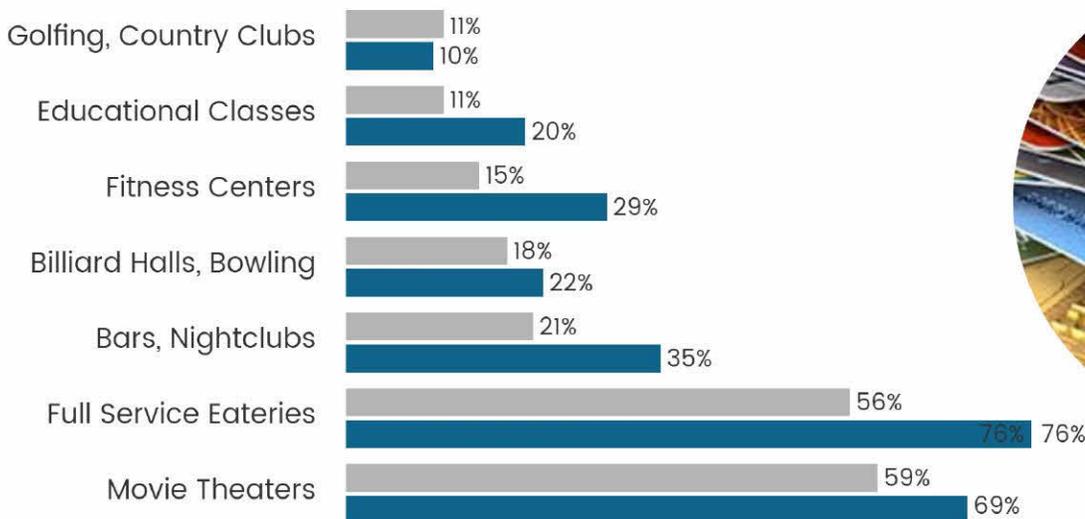


Share of Households Inclined to Spend by Retail and Entertainment Category



Big Family Spending
 Restaurants are Entertaining
 Contributors to Charity
 Sports Enthusiasts
 Active Family Lifestyles
 Diverse Passtimes
 Saving for College

● Family Fun-tastic ● National Average



No Place Like Home | E20

Lifestyles and Spending Preferences | National Averages

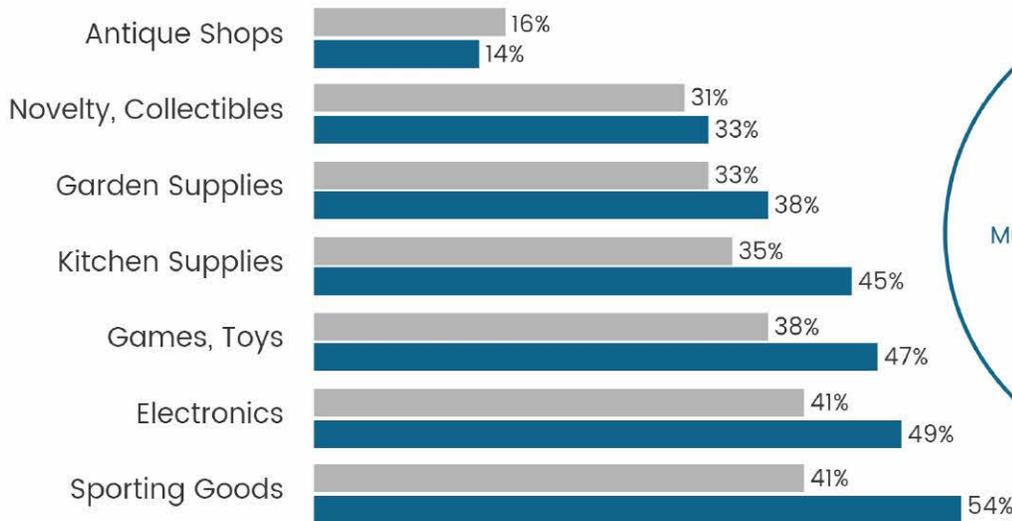
Median Household Income



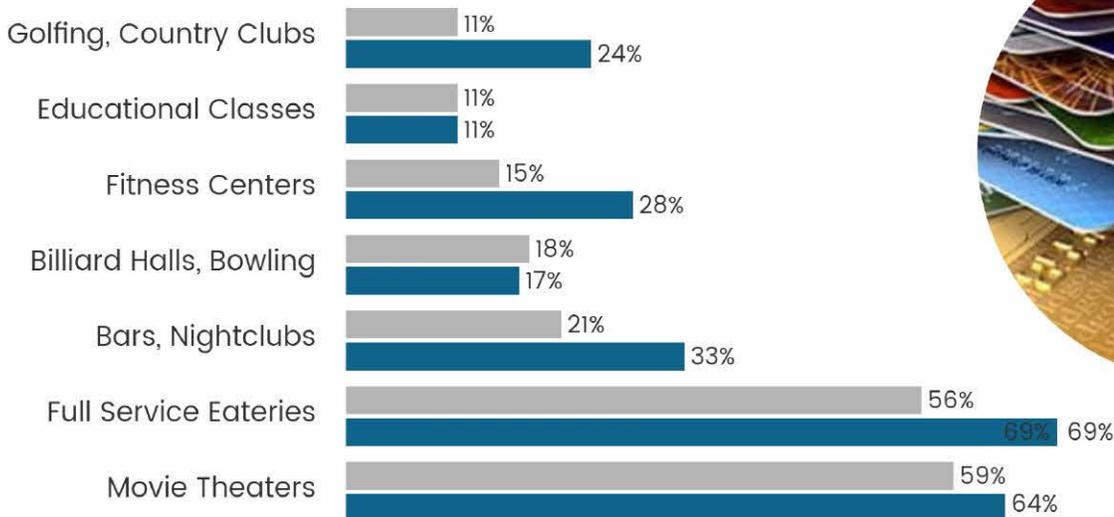
Average Tenure



Share of Households Inclined to Spend by Retail and Entertainment Category



● No Place Like Home ● National Average



Blue Collar Comfort | I31

Lifestyles and Spending Preferences | National Averages

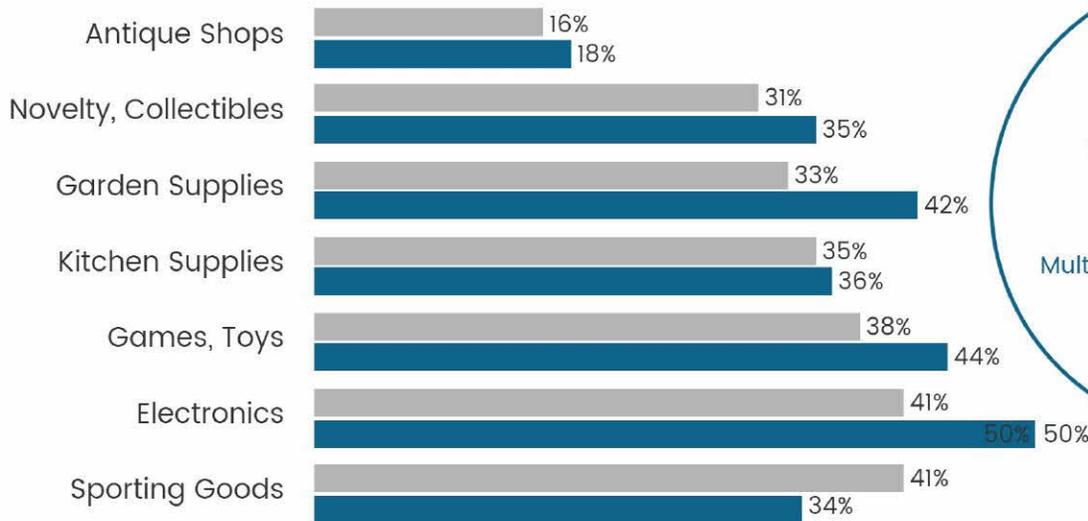
Median Household Income



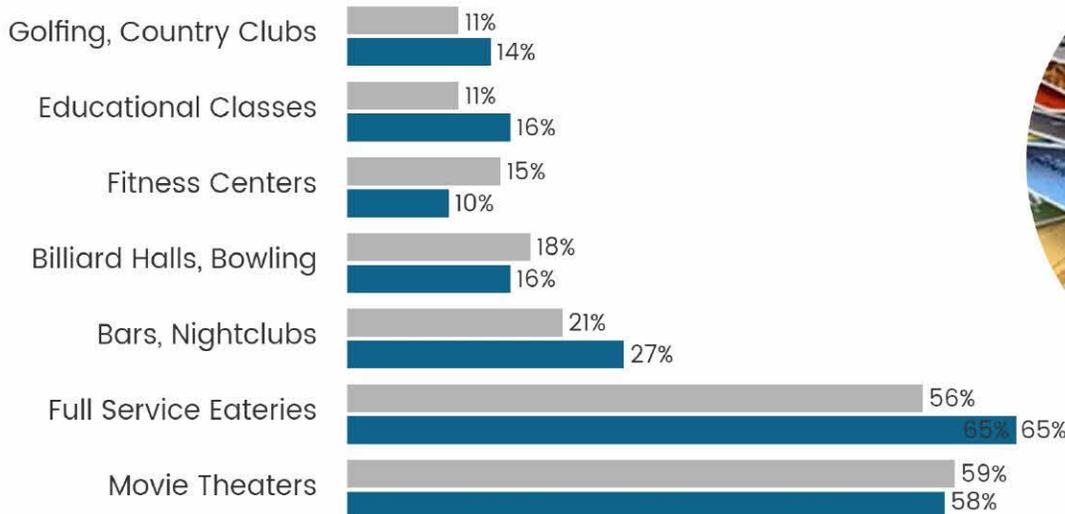
Average Tenure



Share of Households Inclined to Spend by Retail and Entertainment Category



● Blue Collar Comfort ● National Average



Aging in Place | J34

Lifestyles and Spending Preferences | National Averages

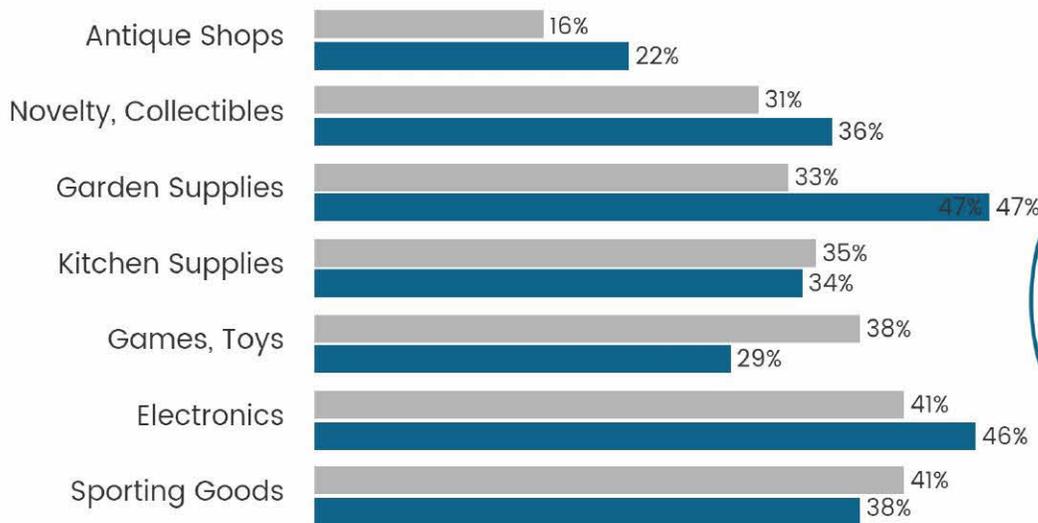
Median Household Income



Average Tenure

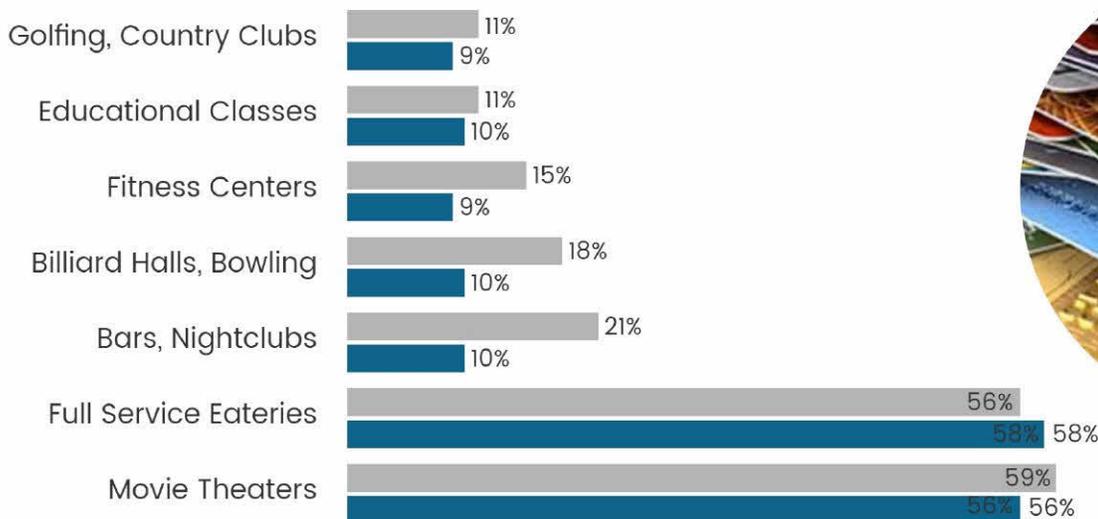


Share of Households Inclined to Spend by Retail and Entertainment Category



Retired, AARP Members
Financially Secure
Appreciation for Fine Arts
Avid Newspaper Readers
Republican Affiliations

● Aging in Place ● National Average



Bohemian Groove | K40

Lifestyles and Spending Preferences | National Averages

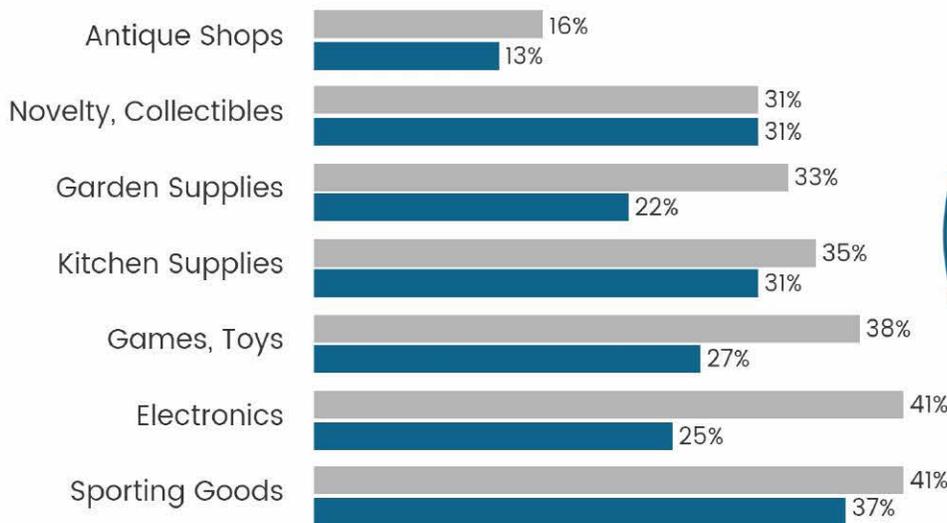
Median Household Income



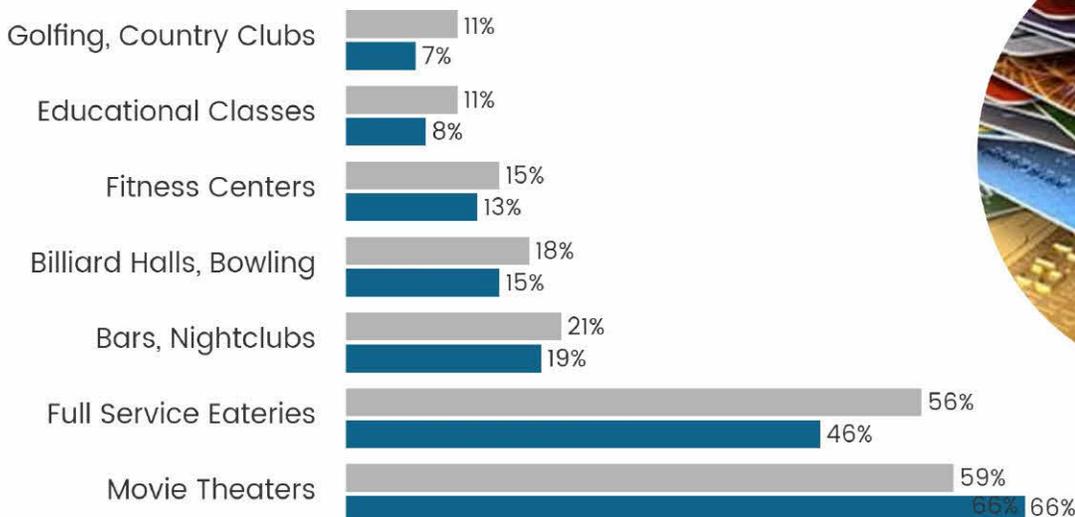
Average Tenure



Share of Households Inclined to Spend by Retail and Entertainment Category



● Bohemian Groove ● National Average



Rooted Flower Power | L42

Lifestyles and Spending Preferences | National Averages

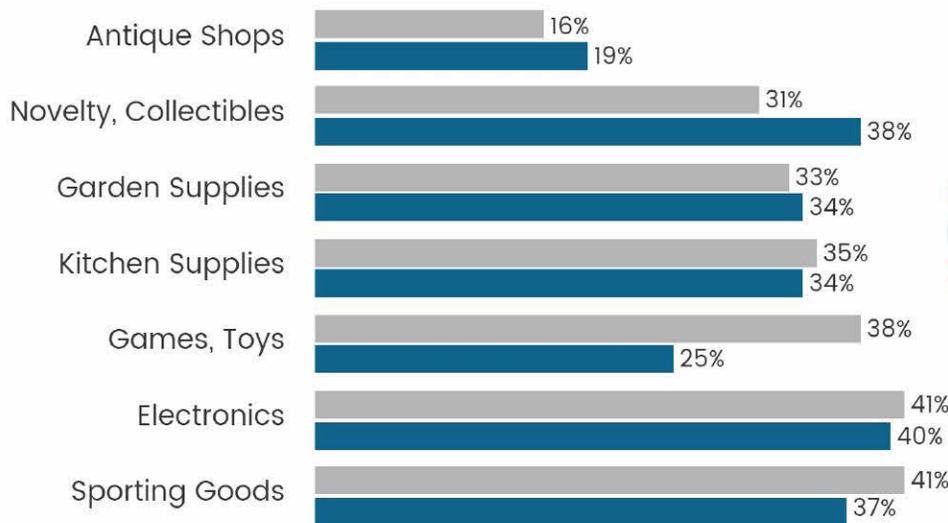
Median Household Income



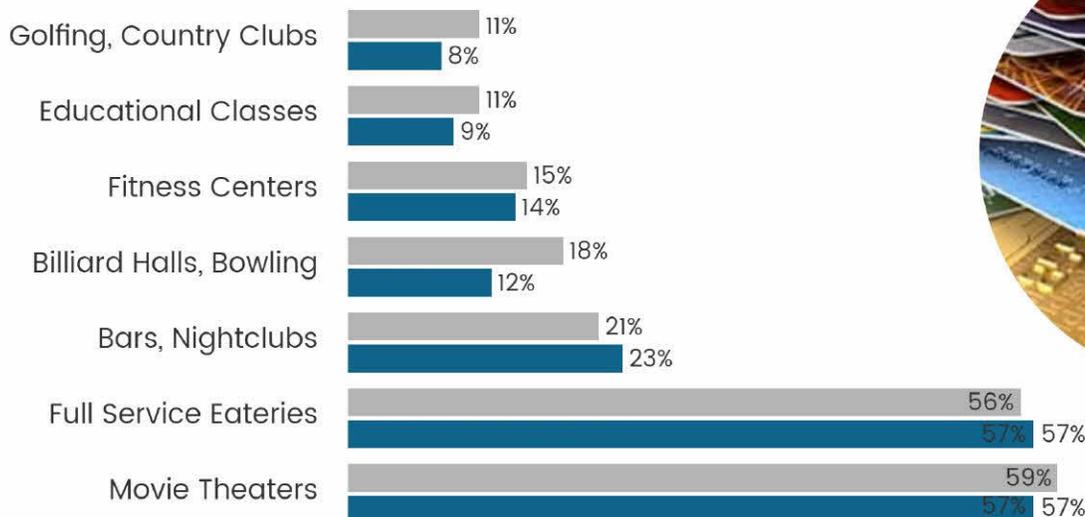
Average Tenure



Share of Households Inclined to Spend by Retail and Entertainment Category



● Rooted Flower Power ● National Average



Infants, Debit Cards | M45

Lifestyles and Spending Preferences | National Averages

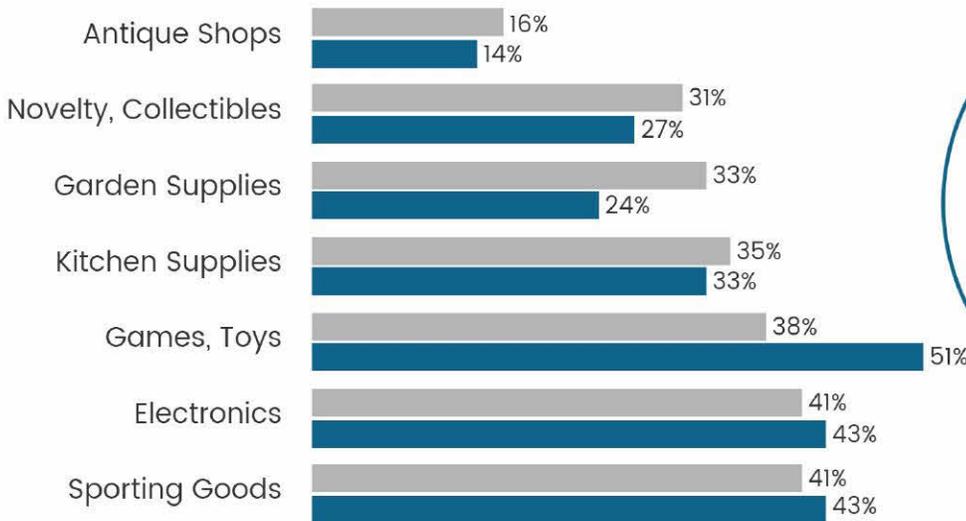
Median Household Income



Average Tenure

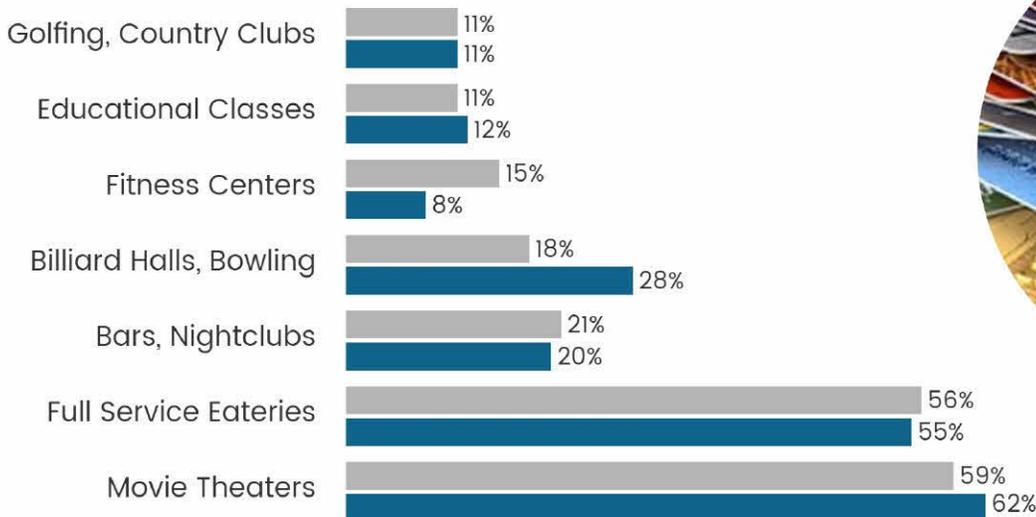


Share of Households Inclined to Spend by Retail and Entertainment Category



Enjoy Bargain Hunting
 Enjoy Bowling, Billiard Leagues
 In Early Childrearing Years
 Home-Based Activities
 Enjoying Reality Television
 Living in Rural Settings

● Infants, Debit Cards ● National Average



True Grit Americans | N46

Lifestyles and Spending Preferences | National Averages

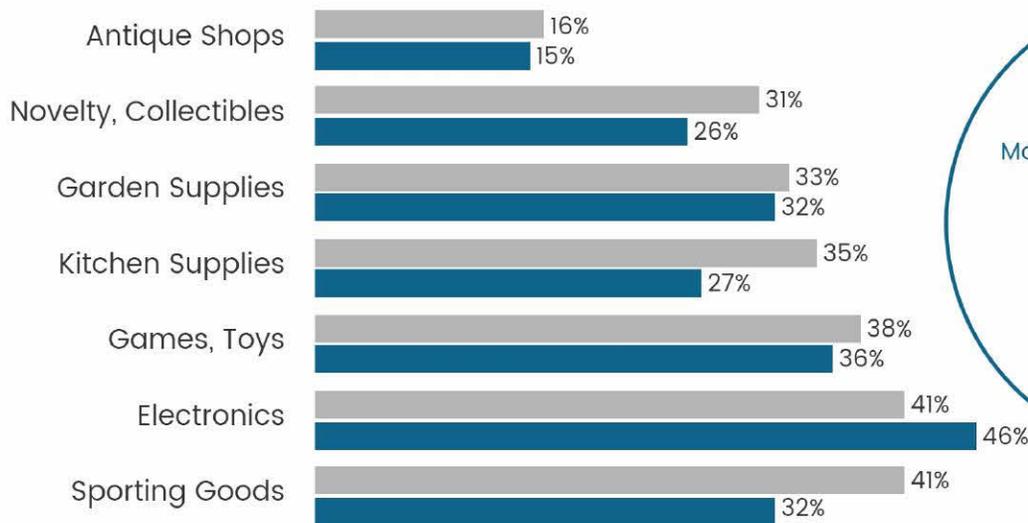
Median Household Income



Average Tenure

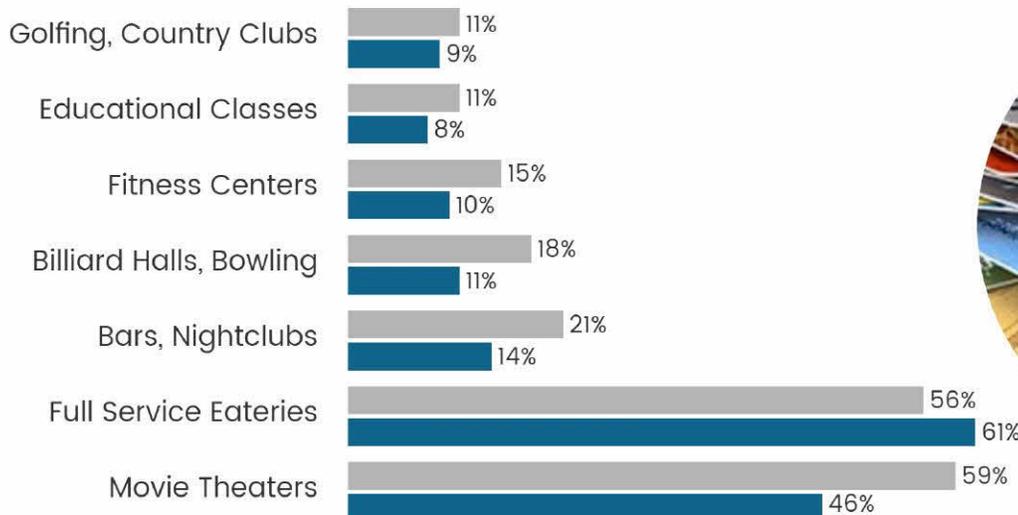


Share of Households Inclined to Spend by Retail and Entertainment Category



Moderate Living within Means
Pragmatic and Practical
Blue Collar Jobs
Easy-Going, Laid-Back
Rural Residences

● True Grit Americans ● National Average



Digital Dependents | O51

Lifestyles and Spending Preferences | National Averages

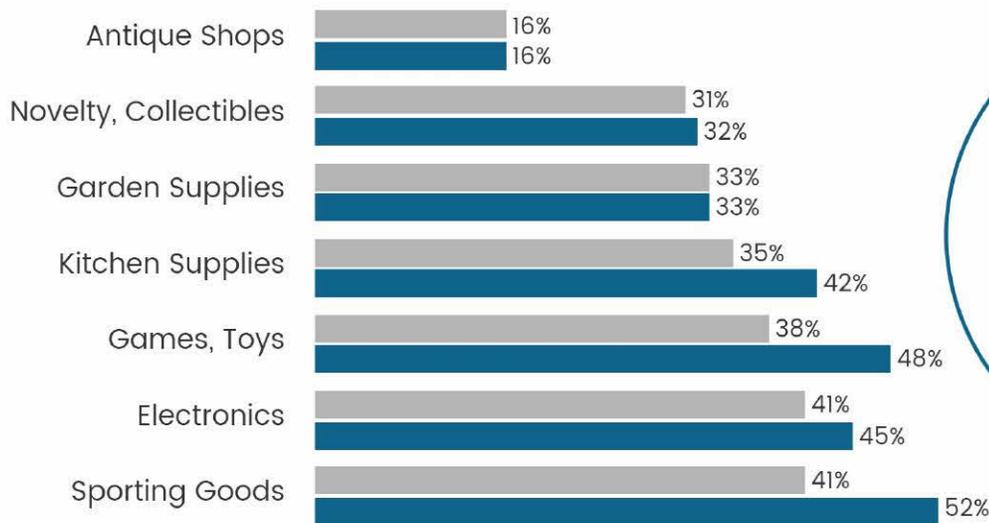
Median Household Income



Average Tenure

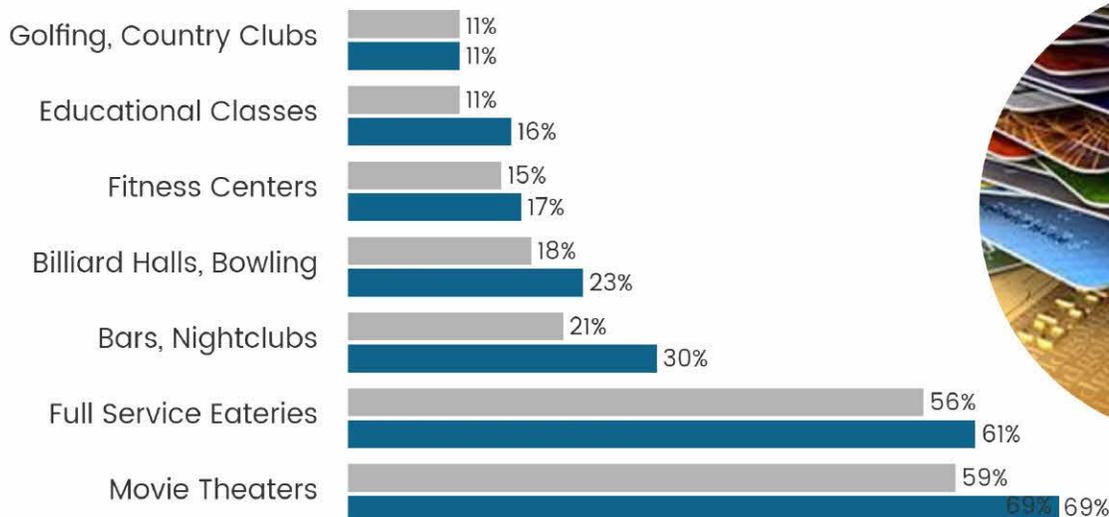


Share of Households Inclined to Spend by Retail and Entertainment Category



Eager to Spend
Single and Ambitious
Adults of All Ages
Appearances are Important
Particularly Fond of Music
Digitally, Tech-Savvy

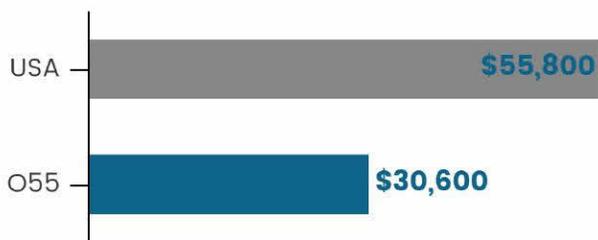
● Digital Dependents ● National Average



Family Troopers | O55

Lifestyles and Spending Preferences | National Averages

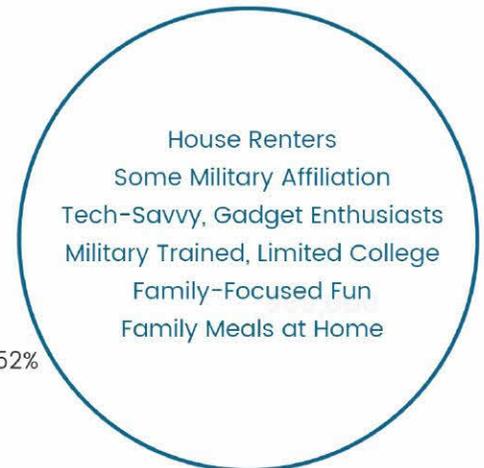
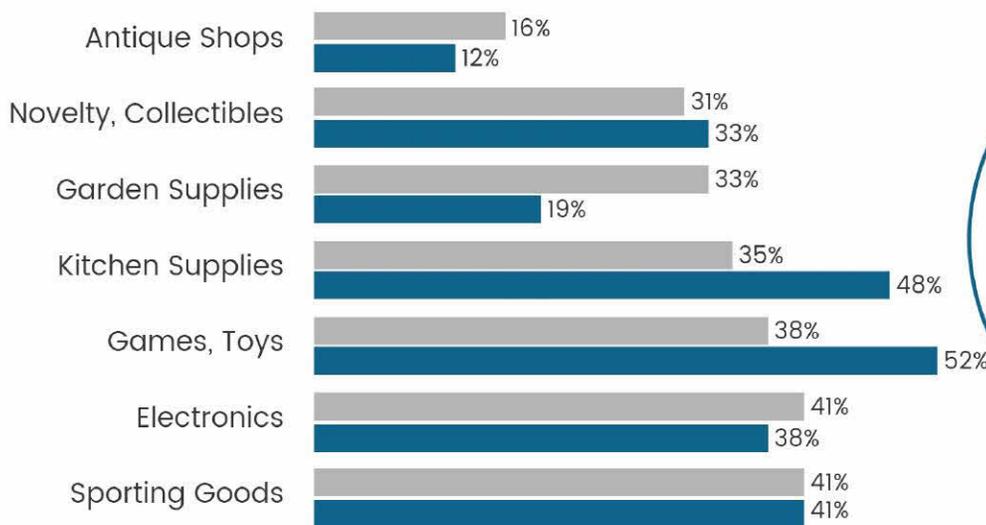
Median Household Income



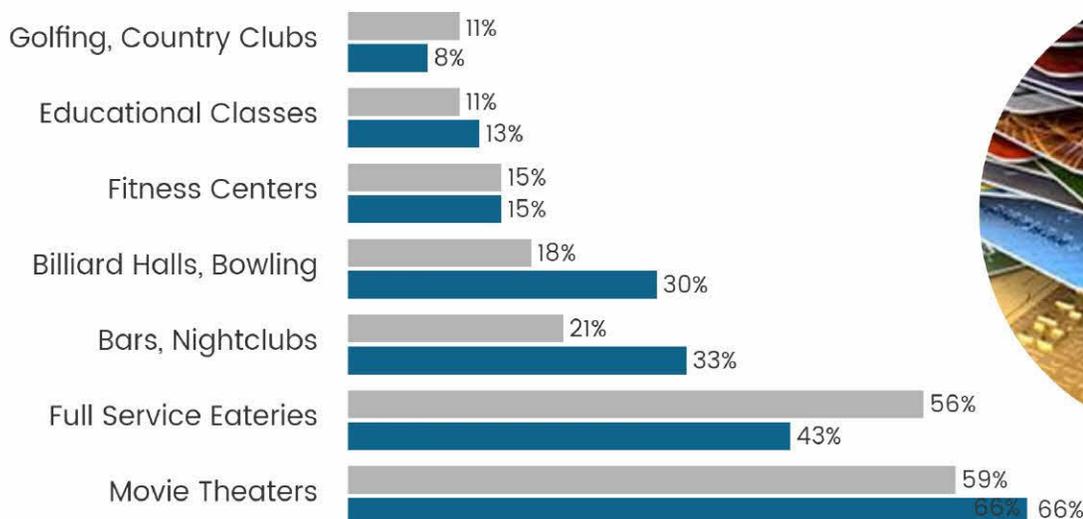
Average Tenure



Share of Households Inclined to Spend by Retail and Entertainment Category



● Family Troopers ● National Average



Top 10 Target Markets by Aggregate Household Expenditure Potential

The City of Monroe | 09 SEM Prosperity Region 09 | Year 2017

| Rank | Code | | Total City Households | Local Median Household Income | Retail Expenditure Potential per Household | Aggregate Expenditure Potential (\$Mil.) | Expenditure Potential as a Share of Income |
|------|------|---------------------------|-----------------------|-------------------------------|--|--|--|
| . | . | All 71 Lifestyle Clusters | 8,426 | \$44,452 | \$31,000 | \$260.0 | 70% |
| . | . | Top 10 Lifestyle Clusters | 5,088 | \$40,000 | \$28,000 | \$163.0 | 70% |
| 1 | E20 | No Place Like Home | 583 | \$55,615 | \$38,970 | \$22.7 | 70% |
| 2 | L42 | Rooted Flower Power | 669 | \$38,283 | \$32,310 | \$21.6 | 84% |
| 3 | I31 | Blue Collar Comfort | 611 | \$45,600 | \$35,270 | \$21.5 | 77% |
| 4 | J34 | Aging in Place | 568 | \$39,558 | \$33,420 | \$19.0 | 84% |
| 5 | N46 | True Grit Americans | 490 | \$36,274 | \$31,200 | \$15.3 | 86% |
| 6 | M45 | Infants, Debit Cards | 561 | \$28,967 | \$27,130 | \$15.2 | 94% |
| 7 | O51 | Digital Dependents | 485 | \$31,809 | \$29,350 | \$14.2 | 92% |
| 8 | B09 | Family Fun-tastic | 312 | \$73,473 | \$42,300 | \$13.2 | 58% |
| 9 | K40 | Bohemian Groove | 386 | \$28,615 | \$26,390 | \$10.2 | 92% |
| 10 | O55 | Family Troopers | 424 | \$24,410 | \$23,430 | \$9.9 | 96% |
| . | . | 61 Other Clusters | 3,338 | . | . | \$94.9 | . |

Source: Underlying data provided by 2015 Experian and 5-yr estimates by the ACS through 2015.

Forecasts and exhibit prepared by LandUseUSA, 2017 © with all rights reserved.



| 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 |

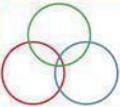


Section **C**
The Retail Strategy

Prepared by:



LandUseUSA



seamless collaborative
urbanism + design + economics

Prepared for:



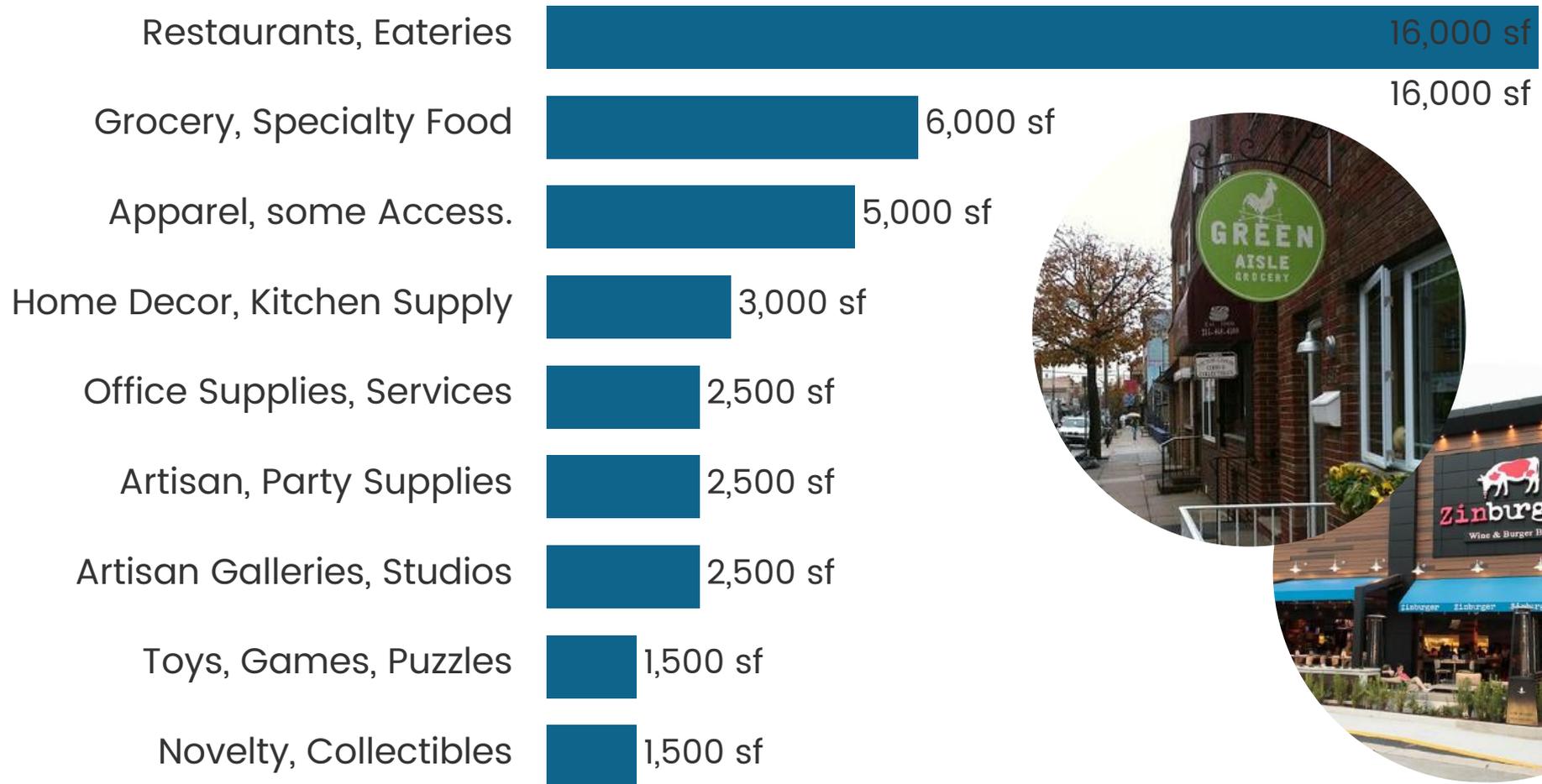
City of Monroe
Monroe, Michigan
Incorporated in 1837

Downtown Market Strategy

Strategy recommendations based on gaps and target market preferences.

The City of Monroe, Michigan

Near-Term Downtown Market Strategy by General Retail Category (40,000 Sq. Ft. Total)



The City of Monroe shares its retail trade area with neighboring Frenchtown Township to the north, and Monroe Township to the south. The City of Monroe benefits from its central location; it is the most urban; and it has the only traditional downtown. Even so, a large number of national chain and big-box formats have opened along Frenchtown Township's commercial corridors, and they have impacted downtown Monroe.

Near-term retail strategies for Downtown Monroe are intentionally focused on three specific categories:

1. Restaurants and Eateries, preferably unique themes with entertainment attributes for an added value.
2. Grocery, and preferably a cluster of specialty food stores that offer alternatives to national brands (organic, Michigan made and grown, artisan products, wine and cheese, meat and deli, etc.).
3. Apparel and clothing stores, preferably mainstream choices that appeal to families, workers, youths, and special events (bridal, prom, party).

Nation-wide realignments among national and brand-name stores will probably result in new vacancies along established commercial corridors. These closures will create additional opportunities for Downtown Monroe to recapture some of its lost market share.

There will be a surplus of vacant retail space in the neighboring townships. Therefore, any new chains should convert, retrofit, or redevelop vacant retail properties (rather than building more retail space).



Retail and Merchant Market Strategies with Some Examples
 NAICS Category 442 | Furniture and Home Furnishings
 The City of Monroe | Monroe County | Year 2017

| List | NAICS | Retail Category | Businesses Like... (Examples) | Strategy Recommendation and Related Notes |
|------|-------|--------------------------------|--|---|
| 1 | 4421 | Furniture | Sack's or Sauer Furniture (or independent merchant) | Use downtown storefront for inventory displays. |
| 2 | 4422 | Home Décor (event planning) | Independent merchants | Specialty store should locate downtown near Durocher's. Include wall décor, pillows, accent lighting, storage containers, etc. |
| 3 | 4422 | Kitchen Supplies | Independent merchant | Specialty store should locate downtown near Durocher's. Could be combined with Home Décor store. Include small appliances, home coffee supplies, cooking tools. |
| 4 | 4511 | Toys, Games, Puzzles | Hopscotch Kids Our House Games | Add location in Downtown Monroe. (Existing location in Tecumseh.) Potential to partner with Our House Games to share downtown space on trial basis. |
| 5 | 4511 | Toys - Educational | Discovery Toys (currently home-based) | Recruit to fill downtown storefront. |
| 6 | 4511 | Quilting Supplies | The Quilt Patch (or independent merchant) | Add location in Downtown Monroe. (Existing location in Tecumseh.) |
| 7 | 4512 | Books - Academic | Academia Text (currently home-based) | Recruit into Downtown Monroe. Potential to partner with Book Nook for display of specialized merchandise. |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Retail and Merchant Market Strategies with Some Examples
 NAICS Category 445 | Food and Beverage Stores
 The City of Monroe | Monroe County | Year 2017

| List | NAICS | Retail Category | Businesses Like... (Examples) | Strategy Recommendation and Related Notes |
|------|-------|---|--|--|
| 1 | 4452 | Specialty Food - Bakery, Wedding Cakes | Independent merchant | Recruit to Downtown Monroe or partner with existing business to showcase cakes for special events. |
| 2 | 4452 | Spec. Food - Beef Jerky | Beef Jerky Unlimited | Add location in Downtown Monroe (is in Dundee and Luna Pier.) |
| 3 | 4452 | Specialty Food Store - Beer and/or Wine | Boulevard Market Westborn Market (or independent merchant) | Add location in Downtown Monroe. (Existing location in Tecumseh.) Add location in Downtown Monroe. (Existing in Dearborn, Plymouth.) Tailor selection of groceries to local market price points and fill gaps in existing grocery stores' merchandise mix. Host wine tastings and other culinary events similar to Boulevard Mkt. existing location. |
| 4 | 4452 | Specialty Food Store - Organic, Fresh Produce | Health Matters (or independent merchant) | Increase selection of organic groceries and promote with local advertising. |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Retail and Merchant Market Strategies with Some Examples
 NAICS Category 448 | Clothing and Clothing Accessories
 The City of Monroe | Monroe County | Year 2017

| List | NAICS | Retail Category | Businesses Like... (Examples) | Strategy Recommendation and Related Notes |
|------|-------|------------------------------------|---|---|
| 1 | 4481 | Apparel - Bridal | The All Together Bride Brides Unlimited (or independent merchant) | Add location in Downtown Monroe. (Existing location in Adrian). Add location in Downtown Monroe. (Existing location in Monroe Twp.) |
| 2 | 4481 | Apparel - Women's | Ragazza Boutique Sofi Stella Boutique (or independent merchant) | Add location in Downtown Monroe. (Existing location in Sylvania, OH.) Add location in Downtown Monroe. (Existing location in Monroe Twp.) Offer style-conscious new women's apparel and accessories at moderate prices. Locate in Downtown Monroe; include party dresses. |
| 3 | 4481 | Apparel - Family | Independent Merchant | Include moderately priced casual apparel for men and children. |
| 4 | 4481 | Apparel - Uniforms | Discount Uniforms & More (or independent merchant) | Locate in Downtown Monroe. Recent departure of two uniform stores leaves large market gap. |
| 5 | 4461 | Personal Care - Beauty Supplies | BeautiControl (currently home-based) | Recruit to fill space in Downtown Monroe. |
| 6 | 4461 | Accessories - Eyewear | Donahue Eyecare | Add new location in Downtown Mornoe. (Existing location on Stewart Rd.) |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Retail and Merchant Market Strategies with Some Examples
 NAICS Category 453 | Miscellaneous Store Retailers
 The City of Monroe | Monroe County | Year 2017

| List | NAICS | Retail Category | Businesses Like... (Examples) | Strategy Recommendation and Related Notes |
|------|-------|---|---|---|
| 1 | 4532 | Artisan Gallery Michigan Themes | Heart of Michigan (or independent merchant) | Add location in Downtown Monroe. (Existing location in Howell.) Focus on Michigan and locally-made merchandise, food. Partner with Monroe County Museum to display items from museum gift shop in downtown storefront. |
| 2 | 4532 | Gift Store | Wrapped Gift | Add location in Downtown Monroe. (Existing location on Telegraph Rd.) Manage printing/shipping services for both locations. |
| 3 | 4532 | Office Supplies - Printing, Shipping | FedEx Office, Wrapped Gift (or independent proprietor) | Add location in Downtown Monroe. (Existing location on Telegraph Rd.) |
| 4 | 4532 | Artisan, Party Supplies | Rock Paper Scissors (or independent merchant) | Add location in Downtown Monroe. (Existing location in Ann Arbor.) Include art and craft supplies, paper goods, greeting cards, some gifts. |
| 5 | 4533 | Collectibles - Comics Collectibles - Vintage | Vault of Midnight (or independent merchant) | Add location in Downtown Monroe. (Existing location in Ann Arbor.) Potential to partner with Our House Games to share retail space. Locate in East Front Street/Wadsworth area. |
| 6 | 4533 | Collectibles - Vinyl Records, 8-Tracks | Independent merchant | Locate in East Front Street/Wadsworth area. Specialize in vinyl LPs. New and used vinyls, disks, audio equipment, related collectibles. |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Retail and Merchant Market Strategies with Some Examples
 NAICS Category 453 | Miscellaneous Store Retailers
 The City of Monroe | Monroe County | Year 2017

| List | NAICS | Retail Category | Businesses Like... (Examples) | Strategy Recommendation and Related Notes |
|------|-------|----------------------------------|--|--|
| 1 | 4539 | Candle Store | Swan Creek Candle Wicked Wax Motif or new independent merchant | Add location in Downtown Monroe. (Existing location in Dundee.) Add location in Downtown Monroe. (Existing location in Tecumseh.) Locate in downtown storefront. |
| 2 | 4539 | Trophies, Engraving | ESP Engraving Services (currently home-based) | Recruit to Downtown Monroe. Partner with existing merchant to showcase awards and trophies in downtown window display. |
| 3 | 4539 | Art Gallery Store | VisArG (currently home-based) | Recruit to fill downtown storefront. |
| 4 | 4539 | Art Gallery - Picture Framing | New independent merchant | Locate in Downtown Monroe. Showcase local art and offer custom picture framing services. |
| 5 | 4539 | First Responder Equipment | Herkimer Radio Service | Add location in Downtown Monroe. (Existing location on Telegraph Rd.) Showcase equipment in Downtown storefront. |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Retail and Merchant Market Strategies with Some Examples
 NAICS Category 722 | Food Services and Drinking Places
 The City of Monroe | Monroe County | Year 2017

| List | NAICS | Retail Category | Businesses Like... (Examples) | Strategy Recommendation and Related Notes |
|------|-------|--|---|---|
| 1 | 722 | Restaurant and More Microbrewery or Brew Pub | Original Gravity Brewing Co. Cotton Brewing Co. Tecumseh Brewing Co. or new independent merchant | Add new location in Downtown Monroe (is in Milan). Add new location in Downtown Morneo (is in Adrian). Add new location in Downtown Monroe (is in Tecumseh). Locate downtown in rehabbed industrial or warehouse space. Offer gastropub-style and artisan small plates. |
| 2 | 722 | Restaur. - Café | Tropical Smoothie Café | Add new location in Downtown Monroe. |
| 3 | 722 | Restaur. - Creole | New independent merchant | Locate in Downtown Monroe; smoke and grill meats on-site. |
| 4 | 722 | Restaur. - Italian | New independent merchant | Locate in Downtown Monroe. Specialize in traditional Italian or Italian-American dishes, not primarily pizza. |
| 5 | 722 | Restaurant - Mediterranean | Mr. Pita, Ahmo's Gyros, Red Olive, or similar | Add new location in Downtown Monroe. |
| 6 | 722 | Restaurant - Seafood | New independent merchant | Locate in Downtown Monroe. Offer fresh-caught fish from the Great Lakes. |
| 7 | 722 | Restaurant - Specialty Theme | Mongolian Grill, Brazilian Steakhouse, Hibachi Grill | Locate in Downtown Monroe. |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Summary of Action Strategies | Downtown Marketing
 The City of Monroe | Monroe County | Year 2017

| List | Strategy Recommendation and Related Notes | Groups Involved | Difficulty Level |
|------|--|---------------------|------------------|
| 1 | Ensure the CTB office is staffed and open to the public during advertised business hours. | CTB | Easy |
| 2 | Redesign CTB website to be uncluttered, mobile-friendly, and contain timely information. | CTB | Easy |
| 3 | Make personal contact with staff at the northbound I-75 Pure Michigan Welcome Center, River Raisin National Battlefield Park, Sterling State Park, local hotels, and other regional places that capture a significant amount of visitor traffic. Discuss and advertise downtown shopping, dining, and cultural opportunities, as well as local events. | DDA, CTB, CoC, City | Easy |
| 4 | Sponsor an endcap display at the northbound I-75 Pure Michigan Welcome Center, with an expanded selection of promotional materials advertising Monroe businesses, attractions, and local events. | DDA, CTB, CoC, City | Medium |
| 5 | Engage in phone calls and personal visits to potential downtown retail tenants, advertising opportunities downtown. | DDA, BDC | Medium |
| 6 | Contact and work with home-based, incubated, and recently closed businesses to help them establish a traditional storefront downtown. | DDA, BDC | Medium |
| 7 | Develop a downtown Welcome Center with free public restrooms, Wi-Fi, and a concierge staff person to greet visitors and answer questions. | DDA, City | Hard |

Note: DDA = Monroe Downtown Development Authority; BDC = Monroe County Business Development Corporation; CoC = Monroe County Chamber of Commerce; CTB = Monroe County Tourism Bureau; City = City of Monroe.
 Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Summary of Action Strategies | Placemaking
 The City of Monroe | Monroe County | Year 2017

| List | Strategy Recommendation and Related Notes | Groups Involved | Difficulty Level |
|------|--|-------------------------------|------------------|
| 1 | Develop and implement a program to assist with restoration of legacy commercial signage in Monroe. | City, DDA | Medium |
| 2 | Develop and implement a program to add murals and other public artworks to blank walls downtown. | City, DDA, Local Stakeholders | Medium |
| 3 | Partner with Frenchtown Charter and Monroe Charter Townships to develop a plan for a Placemaking process for the northern and southern gateway areas. | City, DDA, Local Stakeholders | Medium |
| 4 | Hold a community visioning session to develop a future strategy for the Monroe Farmers' Market. | City, DDA, Local Stakeholders | Medium |
| 5 | Continue implementation efforts for the Heart of Monroe PlacePlan and the River Raisin Heritage Corridor - East Master Plan. Tackle "low hanging fruit" components of these plans first to keep stakeholders motivated and involved. | City, DDA, Local Stakeholders | Easy - Hard |
| 6 | Pursue a form-based code for the downtown, developed through a public visioning session and charrette. | City, DDA, Local Stakeholders | Hard |

Note: DDA = Monroe Downtown Development Authority; BDC = Monroe County Business Development Corporation; CoC = Monroe County Chamber of Commerce; CTB = Monroe County Tourism Bureau; City = City of Monroe.

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.

Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Summary of Action Strategies | Best Business Practices
 The City of Monroe | Monroe County | Year 2017

Exhibit C.9

| List | Strategy Recommendation and Related Notes | Groups Involved | Difficulty Level |
|------|---|-------------------------|------------------|
| 1 | Host a window display challenge for downtown merchants. | DDA, Downtown merchants | Easy |
| 2 | Develop a 'buddy system' where complementary downtown business cross-market each other. | DDA, Downtown merchants | Easy |
| 3 | Businesses work together to replicate engaging merchandise display strategies and police consistent storefront upkeep practices. | DDA, Downtown merchants | Easy |
| 4 | Employ effective online retailing strategies. | Downtown merchants | Medium |
| 5 | Coordinate predictable and consistent operating hours across businesses downtown. Ensure downtown businesses are open past 5 PM daily; coffee shops, art galleries, etc. should close no earlier than 9 PM. | DDA, Downtown merchants | Medium |
| 6 | Sponsor a field trip for downtown merchants to 'secretly shop' regional competitors and learn from their strategies. | DDA, Downtown merchants | Medium |
| 7 | Write regular news releases about downtown businesses and events, and source them to traditional and digital media outlets. | DDA | Medium |

Note: DDA = Monroe Downtown Development Authority; BDC = Monroe County Business Development Corporation; CoC = Monroe County Chamber of Commerce; CTB = Monroe County Tourism Bureau; City = City of Monroe.

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.

Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Websites of Selected Independent Retail Establishments City of Monroe and Vicinity | Monroe County | Year 2017

| Total Count | Place Name | NAICS | General Retail Category | Business Name | Website URL |
|-------------|----------------|-------|--------------------------|-------------------------|--|
| 1 | Monroe | 4421 | Furniture, Appliances | Durocher's Furniture | www.durochersonline.com |
| 2 | Monroe | 4422 | Home Furnish. - Drapery | Inside Looking Out | www.ilomonroe.com |
| 3 | Monroe | 4442 | Home Improve. - Garden | Parran's Greenhouse | www.parransgreenhouse.com |
| 4 | Monroe | 4452 | Spec. Food - Bakery | Cakes by Stephanie | www.cakesbystephaniemi.com |
| 5 | Monroe | 4452 | Spec. Food - Bakery | Erie Bread Co. | www.eriebread.com |
| 6 | Monroe Twp | 4461 | Vitamins, Nutrition | Alive Naturally | www.alivenaturally.org |
| 7 | Monroe Twp | 4481 | Apparel - Women's | Sofi Stella Boutique | www.sofistella.com |
| 8 | Monroe | 4481 | Apparel - Athletic | Run Hip | www.runhip.com |
| 9 | Frenchtown Twp | 4482 | Apparel - Shoes | Yaeger's Shoes | www.yaegershoes.com |
| 10 | Monroe | 4483 | Accessories - Jewelry | Michael's Est. Jewelers | www.michaelsestatejewelers.com |
| 11 | Monroe | 4511 | Sporting Gds. - Bicycles | Jack's Bicycles | www.jacksbike.com |
| 12 | Monroe Twp | 4511 | Board Games | Our House Games | www.ourhousegames.com |

Source: Based on internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
Website URLs verified accurate as of January 2017.

Websites of Selected Independent Retail Establishments City of Monroe and Vicinity | Monroe County | Year 2017

| Total Count | Place Name | NAICS | General Retail Category | Business Name | Website URL |
|-------------|----------------|-------|-----------------------------|--------------------------|--|
| 13 | Monroe | 4532 | Office Supp. - Print - Ship | Global Digital Printing | www.globaldigitalprinting.com |
| 14 | Monroe | 4539 | Art Gallery Store | Barn Owl Studio | www.thebarnowlstudio.com |
| 15 | Monroe | 4539 | Art Gallery Store | Serindipitous Vintage | www.serendipitousvintage.com |
| 16 | Monroe | 4539 | Pet Supplies | Sally Waggs | www.sallywaggspets.com |
| 17 | Monroe | 722 | Restaur. - American | Public House | www.publichousemonroe.com |
| 18 | Monroe | 722 | Restaur. - Mexican | Amaya's Fresh Mex. Grill | www.amayasmexicangrill.com |
| 19 | Frenchtown Twp | 722 | Restaur. - Pizza by Name | Monroe Pizza Kitchen | www.monroepizzakitchen.com |
| 20 | Monroe | 722 | Restaur. - Pizza by Name | Tiffany's Pizza | www.tiffanypizza.com |
| 21 | Monroe | 722 | Restaur. - Ice Cream | Cravings Ice Cream | www.cravingsmonroe.com |

Source: Based on internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.

Website URLs verified accurate as of January 2017.

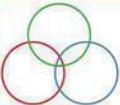


Section **D**
Retail Inventory
and Cluster Analysis

Prepared by:



LandUseUSA



seamless collaborative
urbanism + design + economics

Prepared for:



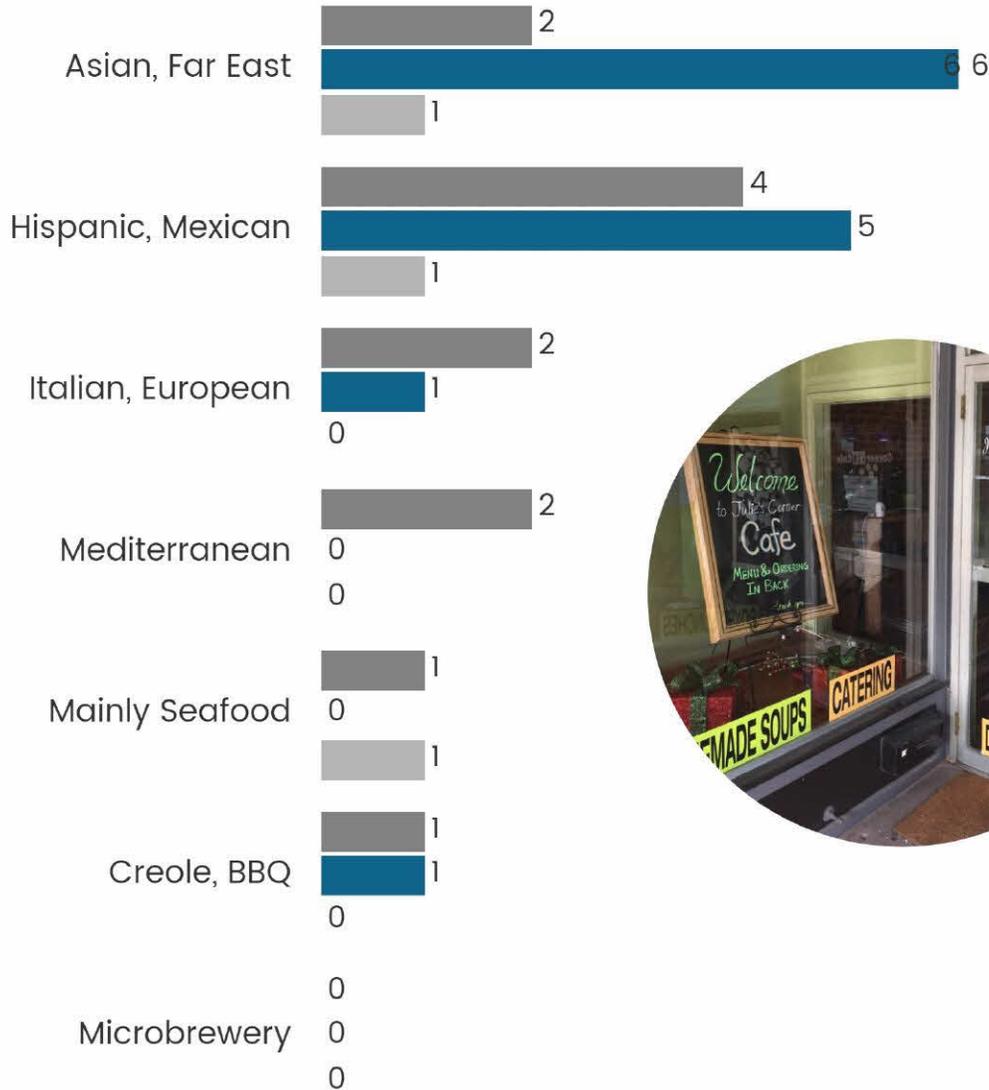
City of Monroe
Monroe, Michigan
Incorporated in 1837

Retail Competitive Inventory

A study of existing establishments in the city and neighboring townships.

The Monroe Market, Michigan

Number of Unique Restaurants and Eateries by Ethnic, Cultural, or Geographic Influence



● Monroe Twp. ● City of Monroe ● Frenchtown Twp.

Restaurants and eateries are far more than just places to receive meals outside of the home. Families and restaurant enthusiasts are seeking unique venues with entertainment value, such as comedy, theater, game rooms, live music, themed decor, open spectator kitchens, customer participation (build your own pizza, etc.), international cuisine, and other concepts. The most significant gap and opportunity for Downtown Monroe is a Microbrewery or Brewing Company, which should include vats and tour demonstrations of the brewing process. It could also include a small brewing supply store.

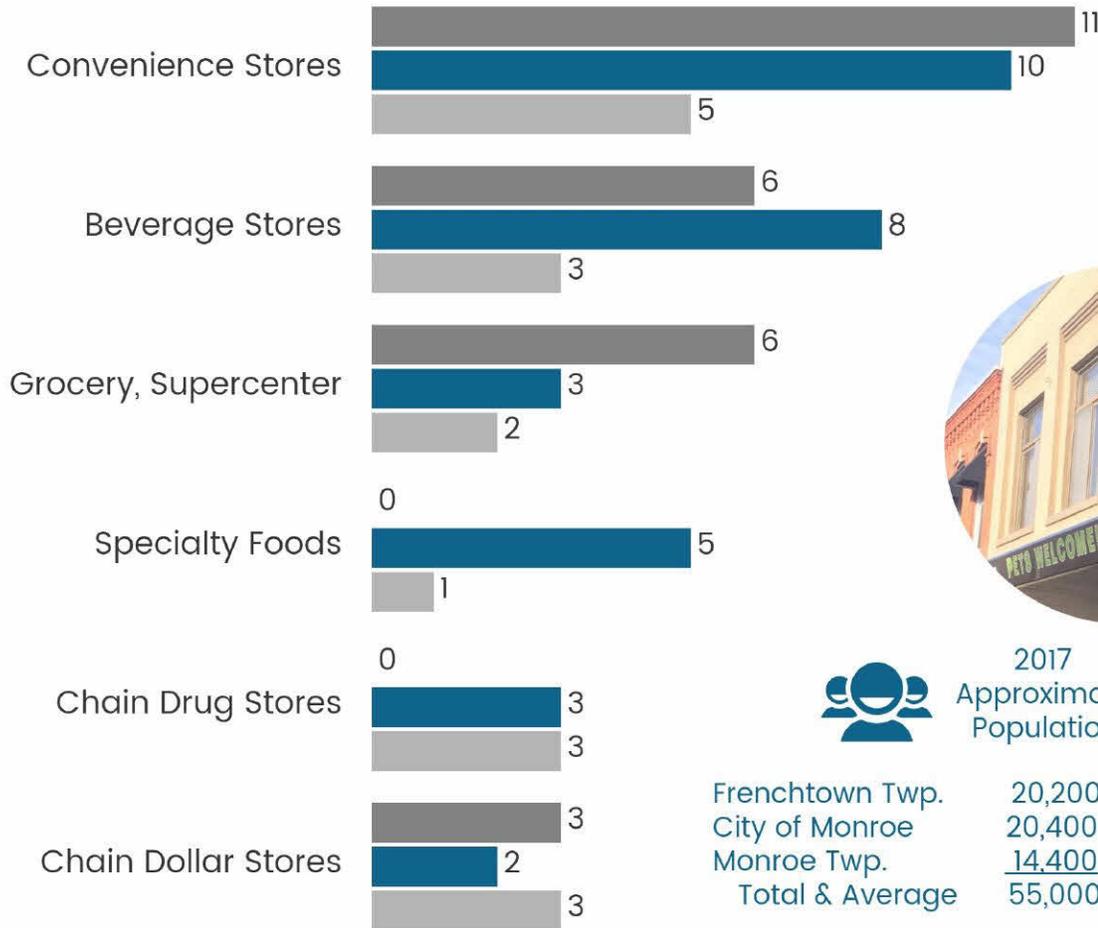


Retail Competitive Inventory

A study of existing establishments in the city and neighboring townships.

The Monroe Market, Michigan

Number of Existing Retail Establishments That Include Some Groceries or Specialty Foods



2017
Approximate
Population

2017
Per Capita
Income



| | | |
|----------------------------|---------------|-----------------|
| Frenchtown Twp. | 20,200 | \$24,000 |
| City of Monroe | 20,400 | \$23,000 |
| Monroe Twp. | <u>14,400</u> | \$26,500 |
| Total & Average | 55,000 | \$24,300 |

● Monroe Twp. ● City of Monroe ● Frenchtown Twp.

The City of Monroe shares its retail trade area with neighboring Frenchtown Township to the north, and Monroe Township to the south (the geographies are listed north to south in this chart). The City of Monroe benefits from its central location; it is the most urban; and it has the only traditional downtown. Even so, a large number of national chain and big-box formats have opened along Frenchtown Township's commercial corridors, and they have impacted downtown Monroe.

Near-term retail strategies for Downtown Monroe include recruiting local entrepreneurs and merchants to create a cluster small specialty food stores (meat & deli, European style, international, green grocer, wine and cheese, etc.). The shops should be strategically located proximate to each other to encourage cross-shopping and repeat visits.

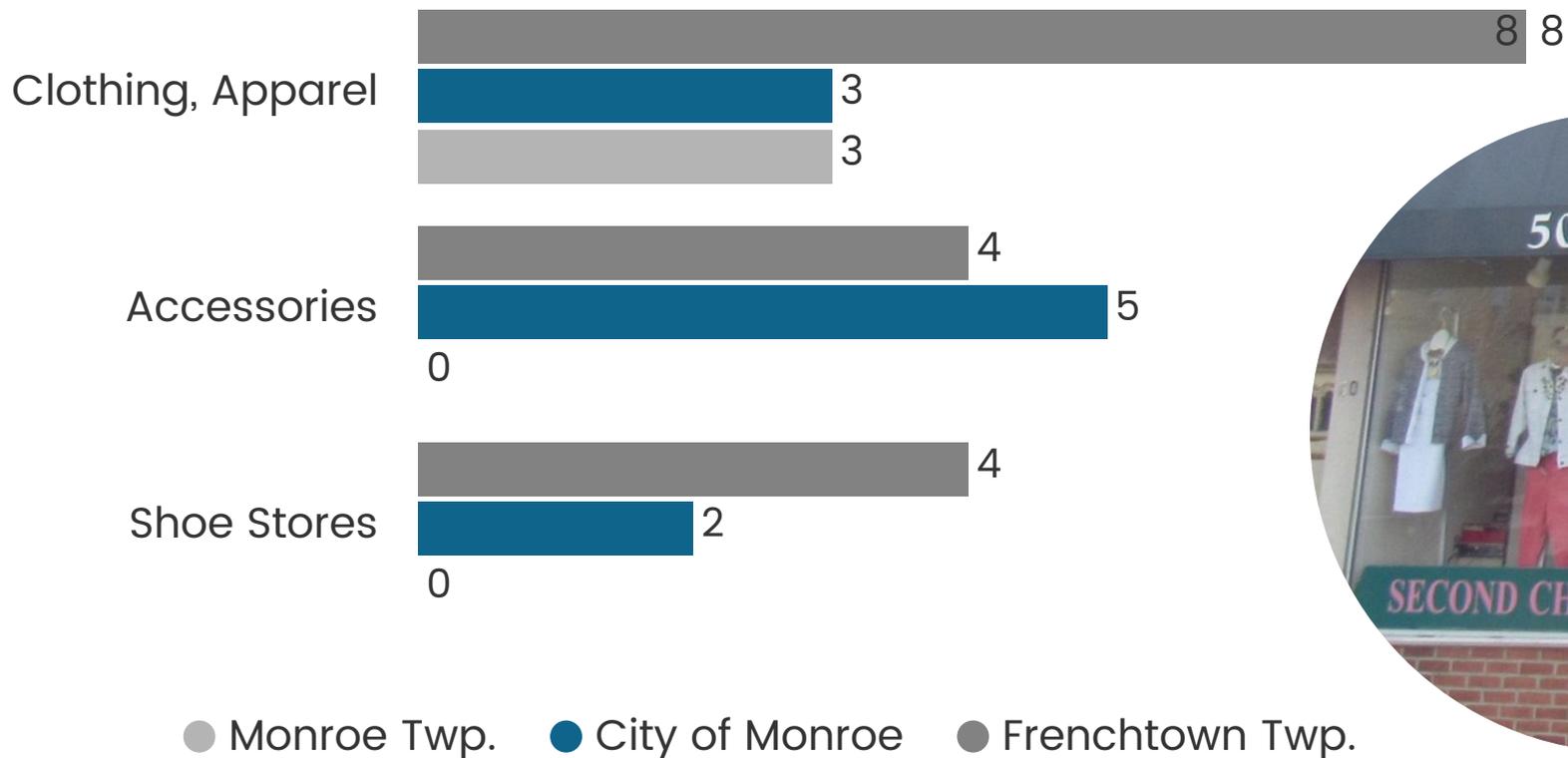


Retail Competitive Inventory

A study of existing establishments in the city and neighboring townships.

The Monroe Market, Michigan

Number of Existing Retail Establishments
Stores with Softline Merchandise (Clothing and Apparel)



2017
Approximate
Population

2017
Per Capita
Income



| | | |
|-----------------|---------------|----------|
| Frenchtown Twp. | 20,200 | \$24,000 |
| City of Monroe | 20,400 | \$23,000 |
| Monroe Twp. | <u>14,400</u> | \$26,500 |
| Total & Average | 55,000 | \$24,300 |

The City of Monroe shares its retail trade area with neighboring Frenchtown Township to the north, and Monroe Township to the south (the geographies are listed north to south in this chart). The City of Monroe benefits from its central location; it is the most urban; and it has the only traditional downtown. Even so, a large number of national chain and big-box formats have opened along Frenchtown Township's commercial corridors, and they have impacted downtown Monroe.

Nation-wide realignments across retail brands are likely to result in future retail vacancies for Frenchtown Township. Recent and future closures in the township will create new opportunities for the City of Monroe to recapture some of its lost market share. Meanwhile, near-term retail strategies include the recruitment of several complementary apparel stores clustered close to each other, with strategic locations proximate to the existing Jones for Men store. They should all share a cross-marketing strategy that encourages shoppers to visit all of the choices, stay longer, return for repeat trips, and ultimately spend more.

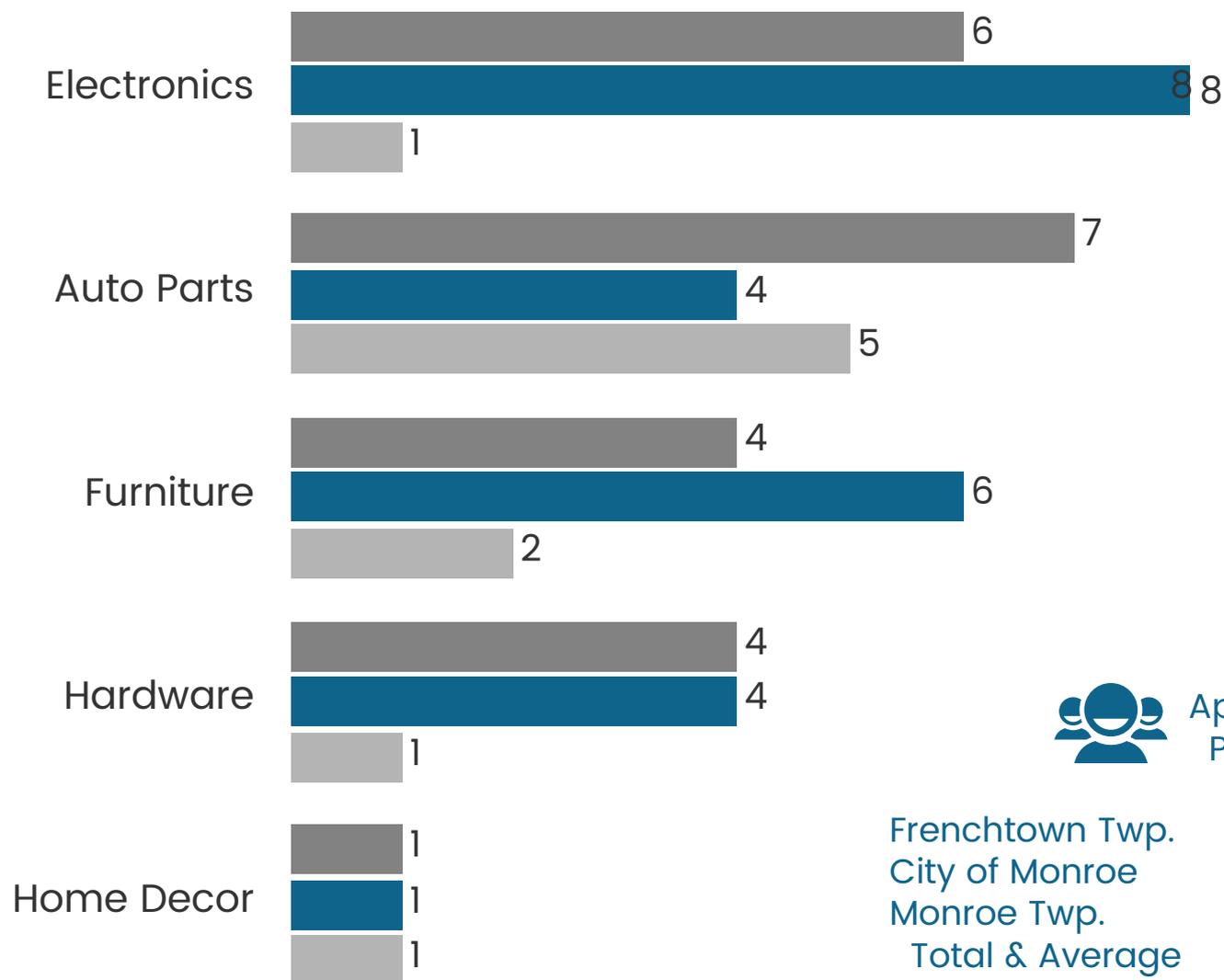


Retail Competitive Inventory

A study of existing establishments in the city and neighboring townships.

The Monroe Market, Michigan

Number of Existing Retail Establishments
Stores with Hardline Merchandise Categories



2017
Approximate
Population

2017
Per Capita
Income



| | | |
|-----------------|---------------|----------|
| Frenchtown Twp. | 20,200 | \$24,000 |
| City of Monroe | 20,400 | \$23,000 |
| Monroe Twp. | <u>14,400</u> | \$26,500 |
| Total & Average | 55,000 | \$24,300 |

● Monroe Twp. ● City of Monroe ● Frenchtown Twp.

The City of Monroe shares its retail trade area with neighboring Frenchtown Township to the north, and Monroe Township to the south (the geographies are listed north to south in this chart). The City of Monroe benefits from its central location; it is the most urban; and it has the only traditional downtown. Even so, a large number of national chain and big-box formats have opened along Frenchtown Township's commercial corridors, and they have impacted downtown Monroe.

Nation-wide realignments across retail brands will probably result in future retail vacancies for Frenchtown Township. Recent and future closures in the township will create new opportunities for the City of Monroe to recapture some of its lost market share. Meanwhile, near-term retail strategies include the recruitment of at least one new store focused on home furnishings and decor, plus a kitchen supply store.

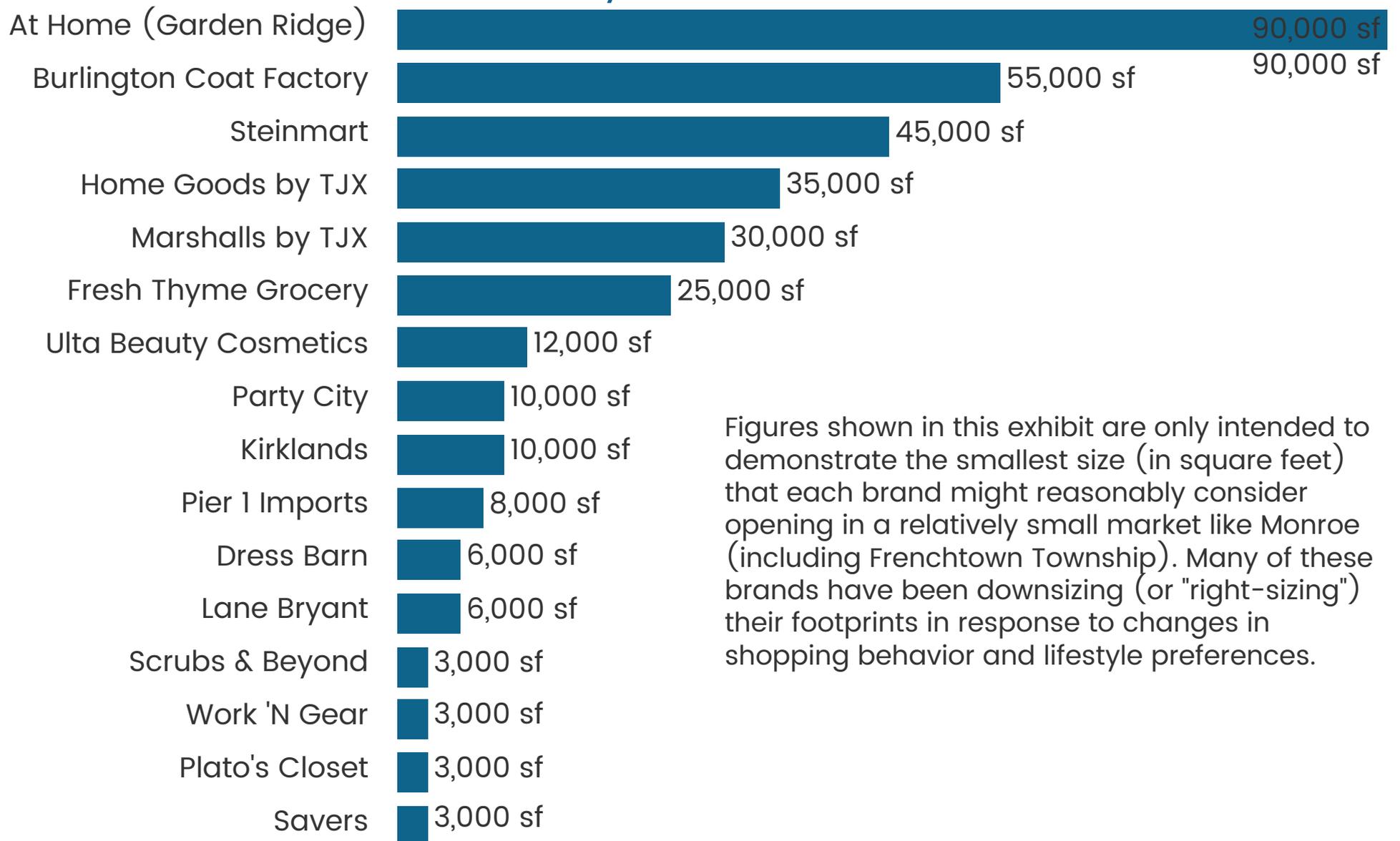


Forecasting the Future

An assessment of national retail trends and store location strategies.

Frenchtown and Monroe Twps.

Some Examples of National Chains Most Likely to Seek New Locations



Figures shown in this exhibit are only intended to demonstrate the smallest size (in square feet) that each brand might reasonably consider opening in a relatively small market like Monroe (including Frenchtown Township). Many of these brands have been downsizing (or "right-sizing") their footprints in response to changes in shopping behavior and lifestyle preferences.

The City of Monroe shares its retail trade area with neighboring Frenchtown Township to the north, and Monroe Township to the south. The city benefits from its central location; it is the most urban; and it has the only traditional downtown. Even so, a large number of national chain and big-box formats have opened along Frenchtown Township's commercial corridors, with negative impacts on the downtown.

Nation-wide realignments among national and brand-name stores will probably result in new vacancies along established commercial corridors. These closures will create additional opportunities for Downtown Monroe to recapture some of its lost market share.

Meanwhile, new brands and national chain stores will continue to expand with new locations but smaller store sizes. This exhibit is intended only to highlight a few brands that are most likely to seek new locations in the market over the next five to ten years.

Depending on the downtown's overall appeal, character, and progress with Placemaking, these brands could be viewed as either opportunities or threats. Unless significant progress is made in the downtown, most of these brands will probably seek space along Frenchtown Township's established retail corridors.



Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 441
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|----------------|---------------------------|-------|--------------------------|-----------------------|
| 1 | Frenchtown Twp | Auto Parts, Supp. | 4413 | Advance Auto Parts | N Telegraph/Hendricks |
| 2 | Frenchtown Twp | Auto Parts, Supp. | 4413 | Auto Zone | N Monroe/Stewart |
| 3 | Frenchtown Twp | Auto Parts, Supp. | 4413 | Belle Tire | N Telegraph/LaSalle |
| 4 | Frenchtown Twp | Auto Parts, Supp. | 4413 | O'Reilly Auto Parts | N Telegraph/Stewart |
| 5 | Frenchtown Twp | Auto Parts, Supp. | 4413 | Tireman Auto Svc. Ctr. | N Telegraph/LaSalle |
| 1 | Frenchtown Twp | Auto Parts, Supp. - Paint | 4413 | Painters Supply & Equip. | N Monroe/Stewart |
| 1 | Frenchtown Twp | Auto Parts, Supp. - Tires | 4413 | RJ Tires & Auto Repair | N Monroe/Stewart |
| 1 | Monroe | Auto Parts, Supp. | 4413 | Auto Value | S Telegraph/W 7th |
| 2 | Monroe | Auto Parts, Supp. | 4413 | Firestone Auto Care | 325 S Monroe |
| 3 | Monroe | Auto Parts, Supp. | 4413 | NAPA Auto Parts | N Telegraph/Lorain |
| 4 | Monroe | Auto Parts, Supp. | 4413 | Paul's Automotive | N Dixie Hwy/E Noble |
| 1 | Monroe Twp | Auto Parts, Supp. | 4413 | Auto Zone | S Monroe/8th |
| 2 | Monroe Twp | Auto Parts, Supp. | 4413 | Line-X of Monroe | S Telegraph/E Dunbar |
| 3 | Monroe Twp | Auto Parts, Supp. | 4413 | O'Reilly Auto Parts | S Monroe/8th |
| 4 | Monroe Twp | Auto Parts, Supp. | 4413 | Sottile's Auto Parts | S Telegraph/E Dunbar |
| 1 | Monroe Twp | Auto Parts, Supp. - Tires | 4413 | Tread-Mill Tire | S Dixie Hwy/Elmwood |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 442
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|----------------|------------------------------|-------|---------------------------|-----------------------|
| 1 | Frenchtown Twp | Furniture | 4421 | Big Lots Furniture | N Telegraph/Stewart |
| 1 | Frenchtown Twp | Furniture, Home Furnish. | 4421 | Carson's Home Store | Mall of Monroe |
| 2 | Frenchtown Twp | Furniture - Mattresses | 4421 | Art Van PureSleep | N Telegraph/Stewart |
| 1 | Frenchtown Twp | Furniture - Rental | 4421 | Aaron's | N Telegraph/Stewart |
| 1 | Frenchtown Twp | Home Furnish. - Floor Cover. | 4422 | Runyon's Furn. - Flooring | N Monroe/Stewart |
| 2 | Frenchtown Twp | Home Furnish. - Floor Cover. | 4422 | Mike's Quality Flooring | N Dixie Hwy./Grand |
| 1 | Monroe | Furniture | 4421 | Amer. Freight Furniture | N Telegraph/Lorain |
| 2 | Monroe | Furniture, Appliances | 4421 | Durocher's Furniture | 222 S Monroe |
| 3 | Monroe | Furniture | 4421 | Sack's Furniture | W Elm/N Telegraph |
| 1 | Monroe | Furniture - Office | 4421 | Home Office Connection | N Telegraph/Hendricks |
| 1 | Monroe | Furniture - Rental | 4421 | Rent-A-Center | N Telegraph/Lorain |
| 2 | Monroe | Furniture - Rental | 4421 | Woodville Rental Co. | N Telegraph/N Custer |
| 1 | Monroe | Home Furnish. - Drapery | 4422 | Inside Looking Out | N Monroe/E Noble |
| 1 | Monroe | Home Furnish. - Floor Cover. | 4422 | Finishers Unlimited | S Telegraph/W 7th |
| 1 | Monroe Twp | Furniture | 4421 | Amish Custom Furniture | S Monroe/8th |
| 2 | Monroe Twp | Furniture, Home Furnish. | 4421 | Sauer Furniture | S Dixie Hwy/Dunbar |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 443
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|----------------|---------------------------|-------|---------------------|----------------------|
| 1 | Frenchtown Twp | Electronics - Cell Phones | 4431 | AT&T Store | N Telegraph/LaSalle |
| 2 | Frenchtown Twp | Electronics - Cell Phones | 4431 | Cricket Wireless | N Telegraph/Stewart |
| 3 | Frenchtown Twp | Electronics - Cell Phones | 4431 | T-Mobile | N Telegraph/LaSalle |
| 4 | Frenchtown Twp | Electronics - Cell Phones | 4431 | Verizon Wireless | N Telegraph/LaSalle |
| 1 | Frenchtown Twp | Electronics - CDs, DVDs | 4431 | FYE | Mall of Monroe |
| 2 | Frenchtown Twp | Electronics - Video Games | 4431 | Game Stop | N Telegraph/LaSalle |
| 1 | Monroe | Electronics | 4431 | Radio Shack | N Telegraph/Lorain |
| 2 | Monroe | Electronics | 4431 | Computer Station | N Telegraph/N Custer |
| 1 | Monroe | Electronics - Automotive | 4431 | DT Electronics | S Telegraph/S Custer |
| 1 | Monroe | Electronics - Cell Phones | 4431 | Boost Mobile | N Telegraph/Lorain |
| 2 | Monroe | Electronics - Cell Phones | 4431 | MetroPCS | N Telegraph/Lorain |
| 3 | Monroe | Electronics - Cell Phones | 4431 | MetroPCS | 309 S Monroe |
| 4 | Monroe | Electronics - Cell Phones | 4431 | Verizon Wireless | S Monroe/6th |
| 1 | Monroe | Electronics - Video Games | 4431 | Gen X Games | N Telegraph/Lorain |
| 1 | Monroe | Sewing, Vacuum Supp. | 4431 | White Sewing Center | 12 S Monroe |
| 1 | Monroe Twp | Electronics - Cell Phones | 4431 | Sprint | S Dixie Hwy/Dunbar |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 444
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|----------------|--------------------------|-------|-------------------------|-----------------------|
| 1 | Frenchtown Twp | Hardware, Home Improve. | 4441 | Lowe's | N Telegraph/LaSalle |
| 2 | Frenchtown Twp | Hardware, Home Improve. | 4441 | St. Pierre ACE Hardware | N Telegraph/Stewart |
| 1 | Frenchtown Twp | Building Mat. - Paint | 4441 | Sherwin-Williams | N Telegraph/Hendricks |
| 1 | Frenchtown Twp | Variety Store - Farm | 4442 | Tractor Supply Co. | N Telegraph/LaSalle |
| 1 | Monroe | Hardware, Home Improve. | 4441 | Baker's ACE Hardware | N Dixie Hwy/Spaulding |
| 1 | Monroe | Building Mat. - Doors | 4441 | LaRoy Door | S Telegraph/S Custer |
| 2 | Monroe | Building Mat. - Lumber | 4441 | Carter Lumber | N Dixie Hwy/Spaulding |
| 1 | Monroe | Home Improve. - Garden | 4442 | Parran's Greenhouse | W Front/N Telegraph |
| 2 | Monroe | Home Improve. - Nursery | 4442 | Koraleski's Flower Ctr. | N Telegraph/Lorain |
| 1 | Monroe | Variety Store - Farm | 4442 | Family Farm & Home | N Telegraph/N Custer |
| 1 | Monroe Twp | Building Mat. - Plumbing | 4441 | Peerless Supply | S Telegraph/W 7th |
| 1 | Monroe Twp | Outdoor Equip. - Lawn | 4442 | Jack's Lawn Service | S Telegraph/E Dunbar |
| 2 | Monroe Twp | Outdoor Equip. - Lawn | 4442 | J&R Tractor | S Dixie Hwy/Dunbar |
| 3 | Monroe Twp | Variety Store - Farm | 4442 | Masserant's Feed-Grain | S Telegraph/E Dunbar |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 445
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|----------------|-----------------------|-------|-------------------------|-------------------------|
| 1 | Frenchtown Twp | Grocery - Supermkt. | 4451 | Aldi | N Telegraph/Stewart |
| 2 | Frenchtown Twp | Grocery - Supermkt. | 4451 | Danny's Fine Foods II | Cole/N Macomb |
| 3 | Frenchtown Twp | Grocery - Supermkt. | 4451 | Kroger | N Dixie Hwy/N Stony Crk |
| 4 | Frenchtown Twp | Grocery - Bulk | 4451 | Gordon Food Service | N Telegraph/Stewart |
| 1 | Frenchtown Twp | Grocery - Convenience | 4451 | Circle K | N Dixie Hwy/Grand |
| 2 | Frenchtown Twp | Grocery - Convenience | 4451 | Citgo Mart | N Dixie Hwy/I-75 |
| 3 | Frenchtown Twp | Grocery - Convenience | 4451 | Citgo Mart | N Dixie Hwy/Grand |
| 4 | Frenchtown Twp | Grocery - Convenience | 4451 | Exxon Mini Mart | N Monroe/Stewart |
| 5 | Frenchtown Twp | Grocery - Convenience | 4451 | Cheers Party Shoppe | N Monroe/Stewart |
| 6 | Frenchtown Twp | Grocery - Convenience | 4451 | Meijer Gas Sta. Store | N Telegraph/Stewart |
| 7 | Frenchtown Twp | Grocery - Convenience | 4451 | Mobil Mart | N Telegraph/Hendricks |
| 8 | Frenchtown Twp | Grocery - Convenience | 4451 | Pilot Travel Center | Nadeau/I-75 |
| 9 | Frenchtown Twp | Grocery - Convenience | 4451 | Sam Stop | S Telegraph/W 7th |
| 10 | Frenchtown Twp | Grocery - Convenience | 4451 | Sunoco Mart | N Monroe/Hurd |
| 11 | Frenchtown Twp | Grocery - Convenience | 4451 | TA Travel Center | N Dixie Hwy/I-75 |
| 1 | Frenchtown Twp | Grocery - Beer, Wine | 4453 | Brest Bay Party Store | N Dixie Hwy/Williams |
| 2 | Frenchtown Twp | Grocery - Beer, Wine | 4453 | Frenchtown Liquor | N Dixie Hwy/N Stony Crk |
| 3 | Frenchtown Twp | Grocery - Beer, Wine | 4453 | Jeff's Bait & Tackle | N Dixie Hwy/Revard |
| 4 | Frenchtown Twp | Grocery - Beer, Wine | 4453 | Julie's Party Store | Dewey/Pte Aux Peaux |
| 5 | Frenchtown Twp | Grocery - Beer, Wine | 4453 | Kenny's Mini Market | N Dixie Hwy/Hurd |
| 6 | Frenchtown Twp | Grocery - Beer, Wine | 4453 | Stoney Point Gen. Store | Dewey/Lakeview |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 445
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|------------|----------------------------|-------|-----------------------|----------------------|
| 1 | Monroe | Grocery - Supermkt. | 4451 | Danny's Fine Foods | W Elm/N Roessler |
| 2 | Monroe | Grocery - Supermkt. | 4451 | Towne Square Market | Kentucky/E 3rd |
| 1 | Monroe | Grocery - Convenience | 4451 | BP Shop | N Telegraph/Lorain |
| 2 | Monroe | Grocery - Convenience | 4451 | Broadway Market | N Monroe/E Grove |
| 3 | Monroe | Grocery - Convenience | 4451 | Citgo Mart | N Monroe/E Noble |
| 4 | Monroe | Grocery - Convenience | 4451 | Independent Dairy | N Telegraph/N Custer |
| 5 | Monroe | Grocery - Convenience | 4451 | Marathon Food Center | S Telegraph/S Custer |
| 6 | Monroe | Grocery - Convenience | 4451 | Marathon Mart | W Elm/N Roessler |
| 7 | Monroe | Grocery - Convenience | 4451 | Pilot Travel Center | N Dixie Hwy/I-75 |
| 8 | Monroe | Grocery - Convenience | 4451 | Riverside Mini Mart | W Front/N Roessler |
| 9 | Monroe | Grocery - Convenience | 4451 | S&G Mart | S Monroe/8th |
| 10 | Monroe | Grocery - Convenience | 4451 | Way Station | S Monroe/7th |
| 1 | Monroe | Spec. Food - Bakery | 4452 | Cakes by Stephanie | N Monroe/E Elm |
| 2 | Monroe | Spec. Food - Bakery | 4452 | Erie Bread Co. | 311 S. Monroe |
| 3 | Monroe | Spec. Food - Confectionery | 4452 | Susie's Sweets & Eats | 21 W 1st |
| 4 | Monroe | Spec. Food - Produce | 4452 | Monroe Farmers' Mkt. | 20 E Willow |
| 5 | Monroe | Spec. Food - Produce | 4452 | Parran's Farm Market | W Front/N Telegraph |
| 1 | Monroe | Grocery - Beer, Wine | 4453 | Anthony's Party Store | Michigan/E Lorain |
| 2 | Monroe | Grocery - Beer, Wine | 4453 | Highlander Market | Winchester/E Front |
| 3 | Monroe | Grocery - Beer, Wine | 4453 | Jake's Liquor | N Dixie Hwy/I-75 |
| 4 | Monroe | Grocery - Beer, Wine | 4453 | Monroe Beer Cooler | W Front/N Telegraph |
| 5 | Monroe | Grocery - Beer, Wine | 4453 | Monroe Food Center | Winchester/E 4th |
| 6 | Monroe | Grocery - Beer, Wine | 4453 | Monroe Liquor Plaza | S Monroe/8th |
| 7 | Monroe | Grocery - Beer, Wine | 4453 | On the Go | N Telegraph/Lorain |
| 8 | Monroe | Grocery - Beer, Wine | 4453 | Partyville Liquor | S Custer/Grace |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 445
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|------------|-----------------------|-------|----------------------|----------------------|
| 1 | Monroe Twp | Grocery - Supermkt. | 4451 | Hi-Lite Fresh Market | S Telegraph/E Dunbar |
| 2 | Monroe Twp | Grocery - Supermkt. | 4451 | Kroger | S Monroe/8th |
| 1 | Monroe Twp | Grocery - Convenience | 4451 | Marathon Mart | La Plaisance/I-75 |
| 2 | Monroe Twp | Grocery - Convenience | 4451 | Roy's Mart | S Dixie Hwy/Dunbar |
| 3 | Monroe Twp | Grocery - Convenience | 4451 | Speedway Mart | La Plaisance/I-75 |
| 4 | Monroe Twp | Grocery - Convenience | 4451 | Speedway Mart | S Dixie Hwy/Dunbar |
| 5 | Monroe Twp | Grocery - Convenience | 4451 | Sunoco Mart | S Telegraph/E Dunbar |
| 1 | Monroe Twp | Spec. Food - Bakery | 4452 | Monica's Baker Boy | S Dixie Hwy/Dunbar |
| 1 | Monroe Twp | Grocery - Beer, Wine | 4453 | EJ's Liquor | S Dixie Hwy/Dunbar |
| 2 | Monroe Twp | Grocery - Beer, Wine | 4453 | Stop & Run | S Custer/Mulhollen |
| 3 | Monroe Twp | Grocery - Beer, Wine | 4453 | Villa Party Store | S Dixie Hwy/Albain |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 446
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|----------------|-----------------------------|-------|------------------------|-------------------------|
| 1 | Frenchtown Twp | Pharmacy | 4461 | Hometown Pharmacy | N Monroe/Stewart |
| 2 | Frenchtown Twp | Pharmacy | 4461 | Prof. Village Pharmacy | Cole/N Monroe |
| 3 | Frenchtown Twp | Pharmacy | 4461 | Yinger's Pharmacy | N Monroe/Stewart |
| 4 | Frenchtown Twp | Pharmacy | 4461 | Kmart Pharmacy | N Monroe/Stewart |
| 5 | Frenchtown Twp | Pharmacy | 4461 | Kroger Pharmacy | N Dixie Hwy/N Stony Crk |
| 6 | Frenchtown Twp | Pharmacy | 4461 | Meijer Pharmacy | N Telegraph/Stewart |
| 7 | Frenchtown Twp | Pharmacy | 4461 | Walmart Pharmacy | N Telegraph/LaSalle |
| 1 | Frenchtown Twp | Personal Care - Beauty Sup. | 4461 | Bath & Body Works | The Mall of Monroe |
| 2 | Frenchtown Twp | Personal Care - Beauty Sup. | 4461 | Color | The Mall of Monroe |
| 1 | Frenchtown Twp | Accessories - Eyewear | 4461 | America's Best | N Telegraph/LaSalle |
| 2 | Frenchtown Twp | Accessories - Eyewear | 4461 | Donahue Eyecare | Stewart/N. Roessler |
| 3 | Frenchtown Twp | Accessories - Eyewear | 4461 | SVS Vision | N Telegraph/Stewart |
| 1 | Frenchtown Twp | Vitamins, Nutrition | 4461 | GNC | The Mall of Monroe |
| 2 | Frenchtown Twp | Vitamins, Nutrition | 4461 | Nutrition Blast | N Dixie Hwy/Williams |
| 3 | Frenchtown Twp | Vitamins, Nutrition | 4461 | Vitamin World | The Mall of Monroe |
| 1 | Frenchtown Twp | Personal Care - Med. Sup. | 4461 | ProMedica Med. Equip. | N Monroe/Stewart |

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Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 446
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|------------|-----------------------------|-------|----------------------|----------------------|
| 1 | Monroe | Chain Drug Store | 4461 | CVS Pharmacy | S Monroe/8th |
| 2 | Monroe | Chain Drug Store | 4461 | Rite Aid | S Telegraph/S Custer |
| 3 | Monroe | Chain Drug Store | 4461 | Walgreen's | N Monroe/Stewart |
| 1 | Monroe | Pharmacy | 4461 | Food Town Pharmacy | N Telegraph/N Custer |
| 2 | Monroe | Pharmacy | 4461 | Hometown Pharmacy | N Macomb/Colonial |
| 3 | Monroe | Pharmacy | 4461 | Monroe Med. Pharmacy | N Monroe/Stewart |
| 4 | Monroe | Pharmacy | 4461 | Yinger's Pharmacy | S Custer/Grace |
| 1 | Monroe | Personal Care - Beauty Sup. | 4461 | CosmoProf | S Telegraph/S Custer |
| 2 | Monroe | Personal Care - Beauty Sup. | 4461 | Sally Beauty Supply | N Telegraph/Lorain |
| 1 | Monroe | Accessories - Eyewear | 4461 | OptimEyes | N Telegraph/Lorain |
| 1 | Monroe | Vitamins, Nutrition | 4461 | Health Matters | 17 E 2nd |
| 2 | Monroe | Vitamins, Nutrition | 4461 | Nutrition Sensation | W Elm/N Roessler |
| 1 | Monroe | Personal Care - Med. Sup. | 4461 | Sobak's Home Medical | N Telegraph/Lorain |
| 2 | Monroe | Personal Care - Med. Sup. | 4461 | Wright & Filippis | N Macomb/Colonial |
| 1 | Monroe Twp | Chain Drug Store | 4461 | Walgreen's | S Telegraph/S Custer |
| 1 | Monroe Twp | Pharmacy | 4461 | Hometown Pharmacy | S Dixie Hwy/Elmwood |
| 3 | Monroe Twp | Pharmacy | 4461 | Kroger Pharmacy | S Monroe/8th |
| 1 | Monroe Twp | Vitamins, Nutrition | 4461 | Alive Naturally | S Telegraph/W 7th |
| 2 | Monroe Twp | Vitamins, Nutrition | 4461 | Nutrition Explosion | S Telegraph/W 7th |

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Retail Trade, Overnight Accommodations, and Food Services
Supply Inventory and Cluster Analysis | NAICS Category 448
City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|----------------|---------------------------|-------|--------------------|---------------------|
| 1 | Frenchtown Twp | Apparel - Women's | 4481 | Maurice's | N Telegraph/LaSalle |
| 2 | Frenchtown Twp | Apparel - Women's | 4481 | Vanity | The Mall of Monroe |
| 1 | Frenchtown Twp | Apparel - Family | 4481 | Rue21 | The Mall of Monroe |
| 2 | Frenchtown Twp | Apparel - Family | 4481 | T.J. Maxx | N Telegraph/LaSalle |
| 1 | Frenchtown Twp | Apparel - Children | 4481 | Justice | The Mall of Monroe |
| 1 | Frenchtown Twp | Apparel - Accessories | 4481 | Claire's | The Mall of Monroe |
| 1 | Frenchtown Twp | Apparel - Athletic | 4481 | Finish Line | The Mall of Monroe |
| 1 | Frenchtown Twp | Apparel - Screen Printing | 4481 | Embroidered Images | N Monroe/Stewart |
| 2 | Frenchtown Twp | Apparel - Screen Printing | 4481 | Rick's Sports | N Monroe/Stumpmier |
| 1 | Frenchtown Twp | Apparel - Shoes | 4482 | Finish Line | The Mall of Monroe |
| 2 | Frenchtown Twp | Apparel - Shoes | 4482 | Payless ShoeSource | The Mall of Monroe |
| 3 | Frenchtown Twp | Apparel - Shoes | 4482 | Shoe Dept. | The Mall of Monroe |
| 4 | Frenchtown Twp | Apparel - Shoes | 4482 | Yaeger's Shoes | N Telegraph/Stewart |
| 1 | Frenchtown Twp | Accessories - Jewelry | 4483 | Kay Jewelers | The Mall of Monroe |
| 2 | Frenchtown Twp | Accessories - Jewelry | 4483 | Milkins Jewelers | N Telegraph/Stewart |
| 3 | Frenchtown Twp | Accessories - Jewelry | 4483 | Osterman Jewelers | The Mall of Monroe |

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Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 448
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|------------|---------------------------|-------|--------------------------|----------------------|
| 1 | Monroe | Apparel - Mens | 4481 | Jones for Men | 10 E Front |
| 1 | Monroe | Apparel - Athletic | 4481 | Run Hip | 14 E 1st |
| 1 | Monroe | Apparel - Screen Printing | 4481 | Monroe Sports | S Telegraph/W 7th |
| 1 | Monroe | Apparel - Shoes | 4482 | Enchanted Shoes | N Monroe/E Noble |
| 2 | Monroe | Apparel - Shoes | 4482 | Martin's Shoe House | 43 S Monroe |
| 1 | Monroe | Accessories - Jewelry | 4483 | Carroll/Ochs Jewelers | N Telegraph/Lorain |
| 2 | Monroe | Accessories - Jewelry | 4483 | David's Jewelry | 127 S Monroe |
| 3 | Monroe | Accessories - Jewelry | 4483 | Diamond Designs | 101 S Monroe |
| 4 | Monroe | Accessories - Jewelry | 4483 | Frenchie's Jewel., Coins | 15 E Front |
| 5 | Monroe | Accessories - Jewelry | 4483 | Michael's Est. Jewelers | N Monroe/E Noble |
| 1 | Monroe Twp | Apparel - Women's | 4481 | Sofi Stella Boutique | S Dixie Hwy/Dunbar |
| 1 | Monroe Twp | Apparel - Bridal | 4481 | Brides Unlimited | S Telegraph/E Dunbar |
| 1 | Monroe Twp | Apparel - Screen Printing | 4481 | Jetscreen Printing | La Plaisance/I-75 |

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Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 451
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|----------------|-------------------------------|-------|-------------------------|-----------------------|
| 1 | Frenchtown Twp | Sporting Gds. | 4511 | Dunham's Sports | N Telegraph/LaSalle |
| 2 | Frenchtown Twp | Sporting Gds. - Firearms | 4511 | Shooters Edge | N Monroe/Hurd |
| 3 | Frenchtown Twp | Sporting Gds. - Golf Carts | 4511 | J & L Golf Carts | US-24/M-125 |
| 4 | Frenchtown Twp | Sporting Gds. - Outdoors | 4511 | Rick's Sports | N Monroe/Stumpmier |
| 1 | Frenchtown Twp | Sporting Gds. - Powerspts. | 4511 | River Raisin Powerspts. | N Telegraph/Hendricks |
| 1 | Frenchtown Twp | Craft Supply, Fabrics | 4511 | Hobby Lobby | N Telegraph/LaSalle |
| 2 | Frenchtown Twp | Craft Supply | 4511 | Pat Catan's Crafts | The Mall of Monroe |
| 1 | Frenchtown Twp | Books, Toys | 4512 | Books-A-Million | The Mall of Monroe |
| 1 | Monroe | Sporting Gds. - Bicycles | 4511 | Jack's Bicycles | 206 S Monroe |
| 2 | Monroe | Sporting Gds. - Billiards | 4511 | Cones & Cue | N Telegraph/N Custer |
| 3 | Monroe | Sporting Gds. - Diving Equip. | 4511 | Divers Incorporated | N Monroe/E Noble |
| 4 | Monroe | Sporting Gds. - Firearms | 4511 | Magnum Force | 409 E Front |
| 1 | Monroe | Musical Instruments | 4511 | Baroque Violin Shop | 317 S Monroe |
| 2 | Monroe | Musical Instruments | 4511 | Penguin Music Store | S Monroe/6th |
| 1 | Monroe | Books | 4512 | Book Nook | 42 S Monroe |
| 1 | Monroe Twp | Sporting Gds. - Golf | 4511 | Mulligan's Indoor Golf | La Plaisance/I-75 |
| 2 | Monroe Twp | Sporting Gds. - Powerspts. | 4511 | Monroe Motorsports | S Telegraph/W 7th |
| 3 | Monroe Twp | Sporting Gds. - Powerspts. | 4511 | Trojan Powerspts. | S Telegraph/W 7th |
| 1 | Monroe Twp | Board Games | 4511 | Our House Games | S Monroe/8th |
| 1 | Monroe Twp | Fabrics | 4511 | Lake Erie Mercantile | S Telegraph/E Dunbar |

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Supply Inventory and Cluster Analysis | NAICS Category 452
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|----------------|----------------------|-------|------------------------|-------------------------|
| 1 | Frenchtown Twp | Department Store | 4522 | Carson's | The Mall of Monroe |
| 2 | Frenchtown Twp | Department Store | 4522 | Kohl's | N Telegraph/LaSalle |
| 1 | Frenchtown Twp | Discount Dept. Store | 4523 | Kmart | N Monroe/Stewart |
| 1 | Frenchtown Twp | Supercenters | 4523 | Meijer | N Telegraph/Stewart |
| 2 | Frenchtown Twp | Supercenters | 4523 | Walmart | N Telegraph/LaSalle |
| 1 | Frenchtown Twp | Chain Dollar Stores | 4523 | Family Dollar | N Dixie Hwy/N Stony Crk |
| 2 | Frenchtown Twp | Chain Dollar Stores | 4523 | Big Lots | N Telegraph/Stewart |
| 3 | Frenchtown Twp | Chain Dollar Stores | 4523 | Five Below | N Telegraph/LaSalle |
| 1 | Frenchtown Twp | Variety Stores | 4523 | MBM Wholesale | N Monroe/Hurd |
| 2 | Frenchtown Twp | Variety Stores | 4523 | Ollie's Bargain Outlet | N Telegraph/LaSalle |
| 1 | Monroe | Chain Dollar Stores | 4523 | Dollar Tree | N Telegraph/Lorain |
| 2 | Monroe | Chain Dollar Stores | 4523 | Family Dollar | N Telegraph/N Custer |
| 1 | Monroe Twp | Chain Dollar Stores | 4523 | Dollar General | S Monroe/8th |
| 2 | Monroe Twp | Chain Dollar Stores | 4523 | Dollar Tree | S Monroe/8th |
| 3 | Monroe Twp | Chain Dollar Stores | 4523 | Family Dollar | S Dixie Hwy/Dunbar |

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Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 453
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|----------------|-----------------------------|-------|------------------------|-----------------------|
| 1 | Frenchtown Twp | Florist | 4531 | Deb's Floral Designs | N Monroe/Stewart |
| 1 | Frenchtown Twp | Office Supp. | 4532 | Staples | N Telegraph/LaSalle |
| 2 | Frenchtown Twp | Office Supp. - Print - Ship | 4532 | UPS Store | N Telegraph/Stewart |
| 1 | Frenchtown Twp | Greeting Cards | 4532 | Green Apple Hallmark | The Mall of Monroe |
| 2 | Frenchtown Twp | Gift Store | 4532 | Gifts & More | N Telegraph/Stewart |
| 3 | Frenchtown Twp | Gift Store | 4532 | Spencer's Gifts | The Mall of Monroe |
| 1 | Frenchtown Twp | Used Merchandise | 4533 | Acts II Closet Resale | N Telegraph/LaSalle |
| 2 | Frenchtown Twp | Used Merchandise | 4533 | Salvation Army Store | N Telegraph/LaSalle |
| 3 | Frenchtown Twp | Used Merchandise | 4533 | Trading Furniture | The Mall of Monroe |
| 4 | Frenchtown Twp | Used Merchandise | 4533 | Trading Treasures | The Mall of Monroe |
| 5 | Frenchtown Twp | Used Merch. - Rare Coins | 4533 | Monroe Coin Shop | N Telegraph/Stewart |
| 1 | Frenchtown Twp | Pet Supplies | 4539 | Pet Supplies Plus | N Telegraph/Hendricks |
| 2 | Frenchtown Twp | Pet Supplies | 4539 | PetSmart | N Telegraph/LaSalle |
| 1 | Frenchtown Twp | First Responder Equipment | 4539 | Herkimer Radio Service | N Telegraph/LaSalle |
| 1 | Frenchtown Twp | Pools, Spas | 4539 | Pooltown | N Telegraph/Stewart |
| 2 | Frenchtown Twp | Pools, Spas | 4539 | Viscount Pools West | N Monroe/Hurd |

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Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 453
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|------------|------------------------------|-------|-------------------------|-----------------------|
| 1 | Monroe | Florist | 4531 | Monroe Florist | S Monroe/8th |
| 2 | Monroe | Florist | 4531 | N Monroe Floral | N Monroe/E Grove |
| 1 | Monroe | Office Supp. - Print - Ship | 4532 | Global Digital Printing | N Telegraph/Hendricks |
| 1 | Monroe | Gift Store | 4532 | Expressions | 10 E 1st |
| 2 | Monroe | Gift Store | 4532 | Loonar Station | N Telegraph/Lorain |
| 1 | Monroe | Used Merchandise | 4533 | Goodwill Industries | N Telegraph/N Custer |
| 2 | Monroe | Used Merchandise | 4533 | Storage Sales of Monroe | 111 S Monroe |
| 3 | Monroe | Used Merchandise | 4533 | Thrift Shop Assn. | 119 S Monroe |
| 4 | Monroe | Used Merch. - Rare Coins | 4533 | Monroe Coin Exchange | S Monroe/8th |
| 5 | Monroe | Used Merch. - Rare Coins | 4533 | Monroe Currency | 125 E Front |
| 1 | Monroe | Pet Supplies | 4539 | Downtown Hound | N Monroe/E Elm |
| 2 | Monroe | Pet Supplies | 4539 | Scally Waggs | 44 W Front |
| 1 | Monroe | Art Gallery Store | 4539 | Art Insight Emporium | 131 E Front |
| 2 | Monroe | Art Gallery Store | 4539 | Barn Owl Studio | 20 S Monroe |
| 3 | Monroe | Art Gallery Store | 4539 | Serindipitous Vintage | 403 E Front |
| 1 | Monroe | Art Supplies - Stained Glass | 4539 | Pencil Tree Studio | N Monroe/Stewart |
| 1 | Monroe | Batteries | 4539 | Battery Wholesale | 303 S Monroe |
| 1 | Monroe | Home Security Equipment | 4539 | Brent's Locksmith | 34 S Monroe |
| 1 | Monroe | Office Equipment | 4539 | B&L Office Machines | 16 W 1st |

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Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 453
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|------------|------------------|-------|----------------------|-----------------------|
| 1 | Monroe Twp | Florist | 4531 | Deb's Floral Designs | S Dixie Hwy/Elmwood |
| 2 | Monroe Twp | Florist | 4531 | Floral Expressions | S Dixie Hwy/Albain |
| 3 | Monroe Twp | Gift Store | 4532 | Wrapped Gift | S Telegraph/W 7th |
| 1 | Monroe Twp | Used Merchandise | 4533 | Habitat for Humanity | La Plaisance/Jones |
| 2 | Monroe Twp | Used Merchandise | 4533 | HSMC Resale Store | S Telegraph/W 7th |
| 3 | Monroe Twp | Used Merchandise | 4533 | Once Upon a Child | S Monroe/8th |
| 1 | Monroe Twp | Pet Supplies | 4539 | Bark Avenue Boutique | S Custer/Mulhollen |
| 2 | Monroe Twp | Pet Supplies | 4539 | Monroe Feeds | S Telegraph/E. Dunbar |
| 1 | Monroe Twp | Fireworks Store | 4539 | Motor City Fireworks | La Plaisance/I-75 |

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Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 713
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|----------------|--------------------------------|-------|--------------------------|----------------------|
| 1 | Frenchtown Twp | Entertain., Rec. - Cinema | 5121 | Phoenix Theatres | The Mall of Monroe |
| 1 | Frenchtown Twp | Entertain., Rec. - Arcade | 7131 | Amazing Space | The Mall of Monroe |
| 2 | Frenchtown Twp | Entertain., Rec. - Arcade | 7131 | Family & Friends Funland | The Mall of Monroe |
| 1 | Frenchtown Twp | Fitness Center | 7139 | Go M.A.D. Fitness | N Telegraph/Stewart |
| 2 | Frenchtown Twp | Fitness Center | 7139 | Planet Fitness | The Mall of Monroe |
| 1 | Frenchtown Twp | Entertain., Rec. - Indoor Spt. | 7139 | Total Sports Complex | Stewart/N Roessler |
| 2 | Frenchtown Twp | Entertain., Rec. - Skating | 7139 | Dixie Skateland | N Dixie Hwy/Williams |
| 3 | Frenchtown Twp | Entertain., Rec. - Mini Golf | 7139 | Old Town Golf | N Monroe/Stumpmier |
| 1 | Monroe | Community Theatre | 7111 | River Raisin Centre | 114 S Monroe |
| 1 | Monroe | Fitness Center | 7139 | Go M.A.D. Fitness | S Monroe/8th |
| 2 | Monroe | Fitness Center | 7139 | Light the Fire CrossFit | S Monroe/5th |
| 3 | Monroe | Fitness Center | 7139 | Monroe Family YMCA | W Elm/N Roessler |
| 4 | Monroe | Fitness Center - Private | 7139 | Monroe Fit. & Physique | 103 W Front |
| 1 | Monroe | Entertain., Rec. - Ice Rink | 7139 | Monroe Multi-Sports | N Dixie Hwy/E Elm |
| 2 | Monroe | Entertain., Rec. - Bowling | 7139 | Nortel Lanes | N Telegraph/Lorain |
| 3 | Monroe | Entertain., Rec. - Indoor Golf | 7139 | Mack's Golf Station | N Monroe/E Elm |
| 1 | Monroe Twp | Fitness Center - Gymnastics | 7139 | CheerWorks Sparks | La Plaisance/I-75 |
| 2 | Monroe Twp | Entertain., Rec. - Bowling | 7139 | Monroe Sport Center | S Dixie Hwy/Dunbar |
| 3 | Monroe Twp | Entertain., Rec. - Go Carts | 7139 | Go Karts Plus | La Plaisance/I-75 |

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Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 721
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|----------------|------------------|-------|--------------------------|-----------------------|
| 1 | Frenchtown Twp | Overnight Accom. | 7211 | America's Best Value Inn | N Dixie Hwy/I-75 |
| 2 | Frenchtown Twp | Overnight Accom. | 7211 | Days Inn & Suites | N Dixie Hwy/I-75 |
| 3 | Frenchtown Twp | Overnight Accom. | 7211 | Hampton Inn | N Dixie Hwy/I-75 |
| 4 | Frenchtown Twp | Overnight Accom. | 7211 | Holiday Inn Express | N Dixie Hwy/I-75 |
| 1 | Monroe | Overnight Accom. | 7211 | Hollywood Motel | N Telegraph/Hendricks |
| 2 | Monroe | Overnight Accom. | 7211 | Hotel Sterling | 109 W Front |
| 3 | Monroe | Overnight Accom. | 7211 | Lotus Bed & Breakfast | 324 Washington |
| 4 | Monroe | Overnight Accom. | 7211 | Quality Inn & Suites | N Dixie Hwy/I-75 |
| 5 | Monroe | Overnight Accom. | 7211 | Sunset Motel | N Telegraph/Lorain |
| 1 | Monroe Twp | Overnight Accom. | 7211 | Baymont Inn & Suites | La Plaisance/I-75 |
| 2 | Monroe Twp | Overnight Accom. | 7211 | Econo Lodge Inn | La Plaisance/I-75 |
| 3 | Monroe Twp | Overnight Accom. | 7211 | Motel 7 | S Dixie Hwy/Dunbar |

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Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 722
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|----------------|--------------------------|-------|--------------------------|-------------------------|
| 1 | Frenchtown Twp | Restaur. - American | 722 | Applebee's | N Telegraph/LaSalle |
| 2 | Frenchtown Twp | Restaur. - American | 722 | Bob Evans | N Telegraph/LaSalle |
| 3 | Frenchtown Twp | Restaur. - American | 722 | Buffalo Wild Wings | N Telegraph/Stewart |
| 4 | Frenchtown Twp | Restaur. - American | 722 | Country Pride Restaur. | N Dixie Hwy/I-75 |
| 5 | Frenchtown Twp | Restaur. - American | 722 | Delta Coney Island | N Telegraph/Stewart |
| 6 | Frenchtown Twp | Restaur. - American | 722 | Ruby Tuesday | N Telegraph/LaSalle |
| 7 | Frenchtown Twp | Restaur. - American | 722 | The Point Pub & Grub | Dewey/Pte Aux Peaux |
| 8 | Frenchtown Twp | Restaur. - American | 722 | The Ross Room | Cole/N Macomb |
| 1 | Frenchtown Twp | Restaur. - Asian | 722 | Panda Chinese Restaur. | N Dixie Hwy/N Stony Crk |
| 2 | Frenchtown Twp | Restaur. - Asian | 722 | Super China Buffet | N Telegraph/Stewart |
| 1 | Frenchtown Twp | Restaur. - Bar by Name | 722 | Jerry's Bar & Grill | N Dixie Hwy/Grand |
| 2 | Frenchtown Twp | Restaur. - Bar by Name | 722 | Northside Bar & Grill | N Monroe/Heiss |
| 1 | Frenchtown Twp | Restaur. - Seafood | 722 | Red Lobster | N Dixie Hwy/I-75 |
| 1 | Frenchtown Twp | Restaur. - BBQ | 722 | Big Blue's Ribs and More | N Telegraph/Stewart |
| 1 | Frenchtown Twp | Restaur. - Italian | 722 | Detroit Beach Pizzeria | N Dixie Hwy/Grand |
| 2 | Frenchtown Twp | Restaur. - Italian | 722 | Joe's French Italian Inn | N Dixie Hwy/Grand |
| 1 | Frenchtown Twp | Restaur. - Mediterranean | 722 | Eureka Gyro | N Monroe/Hurd |
| 2 | Frenchtown Twp | Restaur. - Mediterranean | 722 | Olga's Kitchen | N Telegraph/LaSalle |
| 1 | Frenchtown Twp | Restaur. - Hispanic | 722 | El Vaquero | N Telegraph/Stewart |
| 2 | Frenchtown Twp | Restaur. - Hispanic | 722 | Taqueria Nena's | N Monroe/Stewart |
| 3 | Frenchtown Twp | Restaur. - Hispanic | 722 | Taco Bell | The Mall of Monroe |
| 4 | Frenchtown Twp | Restaur. - Hispanic | 722 | Taco Bell | Nadeau/I-75 |
| 1 | Frenchtown Twp | Restaur. - Ice Cream | 722 | Baskin Robbins | N Telegraph/Stewart |
| 2 | Frenchtown Twp | Restaur. - Ice Cream | 722 | Coldstone Creamery | N Telegraph/Stewart |
| 3 | Frenchtown Twp | Restaur. - Ice Cream | 722 | Ice Cream Time | N Dixie Hwy/N Stony Crk |
| 4 | Frenchtown Twp | Restaur. - Ice Cream | 722 | TCBY | The Mall of Monroe |

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Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 722
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|----------------|----------------------------|-------|-------------------------|-------------------------|
| 1 | Frenchtown Twp | Restaur. - Limited Service | 722 | A&W | N Monroe/Stewart |
| 2 | Frenchtown Twp | Restaur. - Limited Service | 722 | Arby's | N Telegraph/Stewart |
| 3 | Frenchtown Twp | Restaur. - Limited Service | 722 | Burger King | N Telegraph/Stewart |
| 4 | Frenchtown Twp | Restaur. - Limited Service | 722 | Burger King | N Dixie Hwy/I-75 |
| 5 | Frenchtown Twp | Restaur. - Limited Service | 722 | Jimmy John's | N Telegraph/LaSalle |
| 6 | Frenchtown Twp | Restaur. - Limited Service | 722 | KFC | N Telegraph/Hendricks |
| 7 | Frenchtown Twp | Restaur. - Limited Service | 722 | Little Vinny's Drive-In | N Dixie/Pte Aux Peaux |
| 8 | Frenchtown Twp | Restaur. - Limited Service | 722 | McDonald's | N Telegraph/Stewart |
| 9 | Frenchtown Twp | Restaur. - Limited Service | 722 | Popeye's | N Dixie Hwy/I-75 |
| 10 | Frenchtown Twp | Restaur. - Limited Service | 722 | Qdoba | N Telegraph/Stewart |
| 11 | Frenchtown Twp | Restaur. - Limited Service | 722 | Subway | N Telegraph/LaSalle |
| 12 | Frenchtown Twp | Restaur. - Limited Service | 722 | Subway | N Telegraph/Stewart |
| 13 | Frenchtown Twp | Restaur. - Limited Service | 722 | Subway | N Dixie Hwy/Revard |
| 14 | Frenchtown Twp | Restaur. - Limited Service | 722 | Wendy's | N Telegraph/Stewart |
| 15 | Frenchtown Twp | Restaur. - Limited Service | 722 | Wendy's | N Dixie Hwy/I-75 |
| 1 | Frenchtown Twp | Restaur. - Pizza by Name | 722 | Buscemi's Pizza | N Dixie Hwy/Williams |
| 2 | Frenchtown Twp | Restaur. - Pizza by Name | 722 | Buscemi's Pizza & Subs | N Monroe/Stewart |
| 3 | Frenchtown Twp | Restaur. - Pizza by Name | 722 | Happy's Pizza | N Telegraph/Stewart |
| 4 | Frenchtown Twp | Restaur. - Pizza by Name | 722 | Hungry Howie's | N Telegraph/LaSalle |
| 5 | Frenchtown Twp | Restaur. - Pizza by Name | 722 | Kenny's Pizza | N Dixie Hwy/Hurd |
| 6 | Frenchtown Twp | Restaur. - Pizza by Name | 722 | Mary Sacco's Pizza | N Dixie Hwy/N Stony Crk |
| 7 | Frenchtown Twp | Restaur. - Pizza by Name | 722 | Monroe Pizza Kitchen | N Telegraph/Hendricks |
| 8 | Frenchtown Twp | Restaur. - Pizza by Name | 722 | Papa John's Pizza | N Telegraph/Stewart |
| 1 | Frenchtown Twp | Restaur. - Specialty | 722 | Dunkin Donuts | N Telegraph/Stewart |
| 2 | Frenchtown Twp | Restaur. - Specialty | 722 | Mrs. Field's | The Mall of Monroe |
| 3 | Frenchtown Twp | Restaur. - Specialty | 722 | Pretzelmaker | The Mall of Monroe |
| 4 | Frenchtown Twp | Restaur. - Specialty | 722 | Starbucks | N Telegraph/LaSalle |
| 5 | Frenchtown Twp | Restaur. - Specialty | 722 | Tim Horton's | N Telegraph/Stewart |
| 6 | Frenchtown Twp | Restaur. - Specialty | 722 | Tim Horton's | N Dixie Hwy/I-75 |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 722
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|------------|-------------------------|-------|--------------------------|-----------------------|
| 1 | Monroe | Restaur. - American | 722 | Cracker Barrel | N Dixie Hwy/I-75 |
| 2 | Monroe | Restaur. - American | 722 | Denny's | N Dixie Hwy/I-75 |
| 3 | Monroe | Restaur. - American | 722 | Fino's Family Restaurant | S Monroe/8th |
| 4 | Monroe | Restaur. - American | 722 | Front Street Diner | S Telegraph/S Custer |
| 5 | Monroe | Restaur. - American | 722 | IHOP | N Dixie Hwy/I-75 |
| 6 | Monroe | Restaur. - American | 722 | Midtown Coney Island | N Telegraph/Lorain |
| 7 | Monroe | Restaur. - American | 722 | Pete's Garage | N Telegraph/Hendricks |
| 8 | Monroe | Restaur. - American | 722 | R Diner | S Monroe/8th |
| 1 | Monroe | Restaur. - BBQ | 722 | J's Smokehouse | N Dixie Hwy/I-75 |
| 1 | Monroe | Restaur. - Asian | 722 | Asiana | S Telegraph/S Custer |
| 2 | Monroe | Restaur. - Asian | 722 | China Wok | N Telegraph/N Custer |
| 3 | Monroe | Restaur. - Asian | 722 | Kiku Sushi | N Telegraph/Lorain |
| 4 | Monroe | Restaur. - Asian | 722 | Lichee Gdn. Chop Suey | 37 S Monroe |
| 5 | Monroe | Restaur. - Asian | 722 | Sushi Yono | N Telegraph/N Custer |
| 6 | Monroe | Restaur. - Asian | 722 | Magic Wok | N Telegraph/Lorain |
| 1 | Monroe | Restaur. - Gastropub | 722 | Public House | N Monroe/E Elm |
| 2 | Monroe | Restaur. - Bar by Name | 722 | 129 Lounge | 129 E Front |
| 3 | Monroe | Restaur. - Bar by Name | 722 | Beek's Bar & Grille | 128 E Front |
| 4 | Monroe | Restaur. - Bar by Name | 722 | Glenn's Irish Pub | 132 E Front |
| 5 | Monroe | Restaur. - Bar by Name | 722 | Larson's Bar | S Telegraph/S Custer |
| 6 | Monroe | Restaur. - Bar by Name | 722 | McGeady's Town Pub | 39 S Monroe |
| 7 | Monroe | Restaur. - Bar by Name | 722 | Side Track Saloon | E Elm/N Dixie Hwy |
| 8 | Monroe | Restaur. - Bar by Name | 722 | Other Place Bar & Grill | N Dixie Hwy/I-75 |
| 9 | Monroe | Restaur. - Bar by Name | 722 | The Uptown Bar | 8 W Front |
| 10 | Monroe | Restaur. - Bar by Name | 722 | You & I Bar | 36 W Front |
| 1 | Monroe | Restaur. - Café by Name | 722 | Agua Dulce Coffee & Tea | 17 W 1st |
| 2 | Monroe | Restaur. - Café by Name | 722 | Biggby Coffee | N Telegraph/Lorain |
| 3 | Monroe | Restaur. - Café by Name | 722 | Erie Bread Co. | 311 S Monroe |
| 4 | Monroe | Restaur. - Café by Name | 722 | Joy's Monroe | W Front/N Telegraph |
| 5 | Monroe | Restaur. - Café by Name | 722 | Julie's Corner Café | 2 W Front |
| 6 | Monroe | Restaur. - Café by Name | 722 | Norjo's Café | 103 E Front |
| 7 | Monroe | Restaur. - Café by Name | 722 | Tim Horton's | S Monroe/4th |
| 8 | Monroe | Restaur. - Café by Name | 722 | Village Bistro | 15 Washington |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 722
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | City Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|-----------|----------------------------|-------|---------------------------|-----------------------|
| 1 | Monroe | Restaur. - Hispanic | 722 | Amaya's Fresh Mex. Grill | 29 S Monroe |
| 2 | Monroe | Restaur. - Hispanic | 722 | El Maguey II | N Dixie Hwy/I-75 |
| 3 | Monroe | Restaur. - Hispanic | 722 | Señor Cactus Restaur. | 122 E Front |
| 4 | Monroe | Restaur. - Limited Service | 722 | Taco Bell | N Telegraph/Lorain |
| 5 | Monroe | Restaur. - Limited Service | 722 | Taco Bell | N Dixie Hwy/I-75 |
| 1 | Monroe | Restaur. - Ice Cream | 722 | Cravings Ice Cream | 31 E Front |
| 2 | Monroe | Restaur. - Ice Cream | 722 | Danny's Frozen Custard | W Elm/N Roessler |
| 3 | Monroe | Restaur. - Ice Cream | 722 | Independent Dairy | N Telegraph/N Custer |
| 1 | Monroe | Restaur. - Italian | 722 | Dolce Vita Italian Grille | N Telegraph/N Custer |
| 1 | Monroe | Restaur. - Limited Service | 722 | Checkers | N Telegraph/Hendricks |
| 2 | Monroe | Restaur. - Limited Service | 722 | Hot Dog Drive-In | W Front/N Telegraph |
| 3 | Monroe | Restaur. - Limited Service | 722 | McDonald's | N Dixie Hwy/I-75 |
| 4 | Monroe | Restaur. - Limited Service | 722 | Panera Bread | N Telegraph/N Custer |
| 5 | Monroe | Restaur. - Limited Service | 722 | Sonic Drive-In | N Telegraph/Hendricks |
| 6 | Monroe | Restaur. - Limited Service | 722 | Subway | S Telegraph/S Custer |
| 7 | Monroe | Restaur. - Limited Service | 722 | Subway | N Monroe/E Elm |
| 8 | Monroe | Restaur. - Limited Service | 722 | Subway | N Dixie Hwy/I-75 |
| 9 | Monroe | Restaur. - Limited Service | 722 | Vince's W. Elm Drive Inn | W Elm/N Roessler |
| 1 | Monroe | Restaur. - Pizza by Name | 722 | Jet's Pizza | N Telegraph/Lorain |
| 2 | Monroe | Restaur. - Pizza by Name | 722 | Little Caesar's Pizza | S Telegraph/S Custer |
| 3 | Monroe | Restaur. - Pizza by Name | 722 | Mancino's Pizza | 124 E Front |
| 4 | Monroe | Restaur. - Pizza by Name | 722 | Nick & Nino's Pizza | N Telegraph/N Custer |
| 5 | Monroe | Restaur. - Pizza by Name | 722 | Pizza Hut | N Telegraph/Lorain |
| 6 | Monroe | Restaur. - Pizza by Name | 722 | The Clamdigger Pizzeria | E Elm/I-75 |
| 7 | Monroe | Restaur. - Pizza by Name | 722 | Tiffany's Pizza | N Telegraph/Lorain |
| 8 | Monroe | Restaur. - Pizza by Name | 722 | Tiffany's Pizza | N Monroe/E Elm |
| 9 | Monroe | Restaur. - Pizza by Name | 722 | Vito's Pizza and Subs | N Telegraph/N Custer |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Retail Trade, Overnight Accommodations, and Food Services
 Supply Inventory and Cluster Analysis | NAICS Category 722
 City of Monroe and Vicinity | Monroe County | Year 2017

| Count | Place Name | Retail Category | NAICS | Business Name | Address, Location |
|-------|------------|----------------------------|-------|--------------------------|----------------------|
| 1 | Monroe Twp | Restaur. - American | 722 | Benny's Home Cooking | S Dixie Hwy/Dunbar |
| 2 | Monroe Twp | Restaur. - American | 722 | Dena's Family Restaurant | S Dixie Hwy/Dunbar |
| 3 | Monroe Twp | Restaur. - American | 722 | Michigan Grill | S Monroe/8th |
| 4 | Monroe Twp | Restaur. - American | 722 | Monroe Grill | S Telegraph/W 7th |
| 1 | Monroe Twp | Restaur. - Asian | 722 | China Express | S Monroe/8th |
| 1 | Monroe Twp | Restaur. - Seafood | 722 | Harbor Inn & Ale | La Plaisance/Lake |
| 1 | Monroe Twp | Restaur. - Bar by Name | 722 | Mugsy's Sports Bar | S Dixie Hwy/Dunbar |
| 1 | Monroe Twp | Restaur. - Ice Cream | 722 | Dixie Soft Serve | S Dixie Hwy/Elmwood |
| 1 | Monroe Twp | Restaur. - Hispanic | 722 | Taco Bell | La Plaisance/I-75 |
| 1 | Monroe Twp | Restaur. - Limited Service | 722 | KFC | S Dixie Hwy/Dunbar |
| 2 | Monroe Twp | Restaur. - Limited Service | 722 | McDonald's | S Monroe/8th |
| 3 | Monroe Twp | Restaur. - Limited Service | 722 | McDonald's | La Plaisance/I-75 |
| 4 | Monroe Twp | Restaur. - Limited Service | 722 | Subway | S Dixie Hwy/Dunbar |
| 5 | Monroe Twp | Restaur. - Limited Service | 722 | Wendy's | S Monroe/8th |
| 1 | Monroe Twp | Restaur. - Pizza by Name | 722 | Giuseppe's Pizza | S Telegraph/W Albain |
| 2 | Monroe Twp | Restaur. - Pizza by Name | 722 | Marco's Pizza | S Dixie Hwy/Dunbar |
| 3 | Monroe Twp | Restaur. - Pizza by Name | 722 | Mary Sacco's Pizza | S Monroe/8th |

Source: Field observations and internet research by Seamless Collaborative in partnership with LandUseUSA, 2017.
 Lists are not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Downtown Storefronts on Blocks with Continuous Frontage
 Use Categories and Vacancies
 City of Monroe | Monroe County | Year 2017

| Street Name | Side of Street | Block Boundaries | Storefronts in use as... | Count | Notes |
|-------------|----------------|----------------------------|----------------------------|-----------|---|
| W Front | North | Harrison St to S Monroe St | Retail/Restaurant | 5 | Monroe Club (56 W Front) counted as Cultural, Arts and Hotels |
| | | | Office | 8 | |
| | | | Professional Services | 1 | |
| | | | Cultural, Arts, and Hotels | 1 | |
| | | | Vacant | 1 | |
| | | | TOTAL | 16 | |
| W Front | South | Harrison St to Cass St | Retail/Restaurant | 0 | Monroe County Tourism Board (103 W Front) counted as Cultural, Arts, and Hotels |
| | | | Office | 1 | |
| | | | Professional Services | 2 | |
| | | | Cultural, Arts, and Hotels | 2 | |
| | | | Vacant | 0 | |
| | | | TOTAL | 5 | |

Note: all storefronts under renovation or construction are included as Retail/Restaurant.

Source: Field surveys by Seamless Collaborative in partnership with LandUseUSA; January 2017.
 List is not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Downtown Storefronts on Blocks with Continuous Frontage
 Use Categories and Vacancies
 City of Monroe | Monroe County | Year 2017

| Street Name | Side of Street | Block Boundaries | Storefronts in use as... | Count | Notes |
|-------------|----------------|----------------------------|----------------------------|-----------|---|
| W Front | South | Cass St to S Monroe St | Retail/Restaurant | 0 | Monroe County Labor History Museum (41 W Front) counted as Cultural, Arts, and Hotels |
| | | | Office | 0 | |
| | | | Professional Services | 1 | |
| | | | Cultural, Arts, and Hotels | 1 | |
| | | | Vacant | 3 | |
| | | | TOTAL | 5 | |
| E Front | North | S Monroe St to S Macomb St | Retail/Restaurant | 6 | |
| | | | Office | 12 | |
| | | | Professional Services | 1 | |
| | | | Cultural, Arts, and Hotels | 0 | |
| | | | Vacant | 4 | |
| | | | TOTAL | 23 | |

Source: Field surveys by Seamless Collaborative in partnership with LandUseUSA; January 2017.
 List is not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Downtown Storefronts on Blocks with Continuous Frontage
 Use Categories and Vacancies
 City of Monroe | Monroe County | Year 2017

| Street Name | Side of Street | Block Boundaries | Storefronts in use as... | Count | Notes |
|-------------|----------------|------------------------------|----------------------------|----------|---|
| E Front | South | S Monroe St to Washington St | Retail/Restaurant | 3 | |
| | | | Office | 1 | |
| | | | Professional Services | 1 | |
| | | | Cultural, Arts, and Hotels | 0 | |
| | | | Vacant | 0 | |
| | | | TOTAL | 5 | |
| E Front | South | Washington St to S Macomb St | Retail/Restaurant | 4 | Palmer Room event space (120 E Front) counted as Cultural, Arts, and Hotels |
| | | | Office | 1 | |
| | | | Professional Services | 1 | |
| | | | Cultural, Arts, and Hotels | 1 | |
| | | | Vacant | 1 | |
| | | | TOTAL | 8 | |

Source: Field surveys by Seamless Collaborative in partnership with LandUseUSA; January 2017.
 List is not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Downtown Storefronts on Blocks with Continuous Frontage
 Use Categories and Vacancies
 City of Monroe | Monroe County | Year 2017

| Street Name | Side of Street | Block Boundaries | Storefronts in use as... | Count | Notes |
|-------------|----------------|------------------------|----------------------------|----------|-------|
| W 1st | North | Cass St to S Monroe St | Retail/Restaurant | 1 | |
| | | | Office | 2 | |
| | | | Professional Services | 1 | |
| | | | Cultural, Arts, and Hotels | 1 | |
| | | | Vacant | 1 | |
| | | | TOTAL | 6 | |
| W 1st | South | Cass St to S Monroe St | Retail/Restaurant | 2 | |
| | | | Office | 0 | |
| | | | Professional Services | 1 | |
| | | | Cultural, Arts, and Hotels | 0 | |
| | | | Vacant | 0 | |
| | | | TOTAL | 3 | |

Source: Field surveys by Seamless Collaborative in partnership with LandUseUSA; January 2017.
 List is not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Downtown Storefronts on Blocks with Continuous Frontage
 Use Categories and Vacancies
 City of Monroe | Monroe County | Year 2017

| Street Name | Side of Street | Block Boundaries | Storefronts in use as... | Count | Notes |
|-------------|----------------|------------------------------|----------------------------|----------|--|
| E 1st | North | S Monroe St to Washington St | Retail/Restaurant | 1 | Christian Science Reading Room (21 E 1st) counted as Retail |
| | | | Office | 2 | |
| | | | Professional Services | 0 | |
| | | | Cultural, Arts, and Hotels | 0 | |
| | | | Vacant | 0 | |
| | | | TOTAL | 3 | |
| E 1st | South | S Monroe St to Washington St | Retail/Restaurant | 3 | |
| | | | Office | 0 | |
| | | | Professional Services | 1 | |
| | | | Cultural, Arts, and Hotels | 0 | |
| | | | Vacant | 0 | |
| | | | TOTAL | 4 | |

Source: Field surveys by Seamless Collaborative in partnership with LandUseUSA; January 2017.
 List is not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Downtown Storefronts on Blocks with Continuous Frontage
 Use Categories and Vacancies
 City of Monroe | Monroe County | Year 2017

| Street Name | Side of Street | Block Boundaries | Storefronts in use as... | Count | Notes |
|-------------|----------------|----------------------------|----------------------------|----------|--|
| S Monroe | West | River Raisin to W Front St | Retail/Restaurant | 4 | |
| | | | Office | 1 | |
| | | | Professional Services | 0 | |
| | | | Cultural, Arts, and Hotels | 0 | |
| | | | Vacant | 0 | |
| | | | TOTAL | 5 | |
| S Monroe | West | W Front St to W 1st St | Retail/Restaurant | 5 | Book Nook (42 S Monroe) counted as occupied while under renovation |
| | | | Office | 0 | |
| | | | Professional Services | 0 | |
| | | | Cultural, Arts, and Hotels | 0 | |
| | | | Vacant | 4 | |
| | | | TOTAL | 9 | |

Source: Field surveys by Seamless Collaborative in partnership with LandUseUSA; January 2017.
 List is not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Downtown Storefronts on Blocks with Continuous Frontage
 Use Categories and Vacancies
 City of Monroe | Monroe County | Year 2017

| Street Name | Side of Street | Block Boundaries | Storefronts in use as... | Count | Notes |
|-------------|----------------|----------------------|----------------------------|----------|-------|
| S Monroe | West | W 1st St to W 2nd St | Retail/Restaurant | 0 | |
| | | | Office | 0 | |
| | | | Professional Services | 1 | |
| | | | Cultural, Arts, and Hotels | 2 | |
| | | | Vacant | 0 | |
| | | | TOTAL | 3 | |
| S Monroe | West | W 2nd St to W 3rd St | Retail/Restaurant | 2 | |
| | | | Office | 0 | |
| | | | Professional Services | 0 | |
| | | | Cultural, Arts, and Hotels | 0 | |
| | | | Vacant | 0 | |
| | | | TOTAL | 2 | |

Source: Field surveys by Seamless Collaborative in partnership with LandUseUSA; January 2017.
 List is not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Downtown Storefronts on Blocks with Continuous Frontage
 Use Categories and Vacancies
 City of Monroe | Monroe County | Year 2017

| Street Name | Side of Street | Block Boundaries | Storefronts in use as... | Count | Notes |
|-------------|----------------|----------------------------|----------------------------|----------|-------|
| S Monroe | East | River Raisin to E Front St | Retail/Restaurant | 0 | |
| | | | Office | 3 | |
| | | | Professional Services | 0 | |
| | | | Cultural, Arts, and Hotels | 0 | |
| | | | Vacant | 1 | |
| | | | TOTAL | 4 | |
| S Monroe | East | E Front St to E 1st St | Retail/Restaurant | 5 | |
| | | | Office | 2 | |
| | | | Professional Services | 0 | |
| | | | Cultural, Arts, and Hotels | 0 | |
| | | | Vacant | 2 | |
| | | | TOTAL | 9 | |

Source: Field surveys by Seamless Collaborative in partnership with LandUseUSA; January 2017.
 List is not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Downtown Storefronts on Blocks with Continuous Frontage
 Use Categories and Vacancies
 City of Monroe | Monroe County | Year 2017

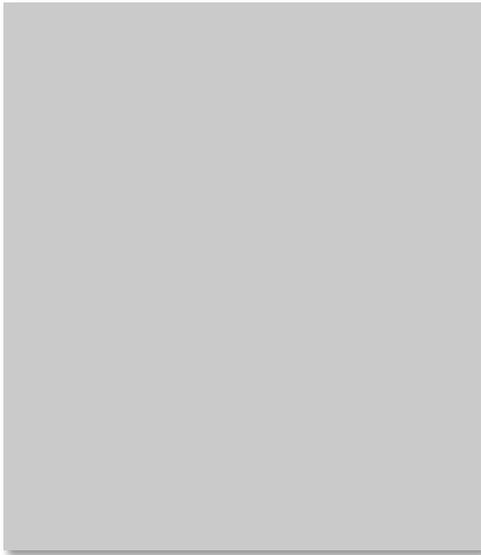
| Street Name | Side of Street | Block Boundaries | Storefronts in use as... | Count | Notes |
|-------------|----------------|------------------------|----------------------------|-----------|-------|
| S Monroe | East | E 1st St to E 2nd St | Retail/Restaurant | 4 | |
| | | | Office | 0 | |
| | | | Professional Services | 2 | |
| | | | Cultural, Arts, and Hotels | 0 | |
| | | | Vacant | 0 | |
| | | | TOTAL | 6 | |
| Washington | East | E Front St to E 1st St | Retail/Restaurant | 1 | |
| | | | Office | 12 | |
| | | | Professional Services | 0 | |
| | | | Cultural, Arts, and Hotels | 0 | |
| | | | Vacant | 2 | |
| | | | TOTAL | 15 | |

Source: Field surveys by Seamless Collaborative in partnership with LandUseUSA; January 2017.
 List is not necessarily all-inclusive, and any imperfections or omissions are unintentional.

Downtown Storefronts on Blocks with Continuous Frontage
 Use Categories and Vacancies
 City of Monroe | Monroe County | Year 2017

| | Storefronts in use as... | Count | Pct. |
|-------------------|----------------------------|------------|-------------|
| TOTALS FROM ABOVE | Retail/Restaurant | 46 | 35% |
| | Office | 45 | 34% |
| | Professional Services | 13 | 10% |
| | Cultural, Arts, and Hotels | 8 | 6% |
| | Vacant | 19 | 15% |
| | TOTAL | 131 | 100% |

Source: Field surveys by Seamless Collaborative in partnership with LandUseUSA; January 2017.
 List is not necessarily all-inclusive, and any imperfections or omissions are unintentional.



Section **E**
Photo Collages

Prepared by:



LandUseUSA



seamless collaborative
urbanism + design + economics

Prepared for:



City of Monroe
Monroe, Michigan
Incorporated in 1837

Downtown Scale with Some Opportunities for Façade Rehab or Restoration Projects
The City of Monroe | Monroe County | SEM Prosperity Region 09



Evidence of Placemaking Processes in Downtown and Vicinity
The City of Monroe | Monroe County | SEM Prosperity Region 09

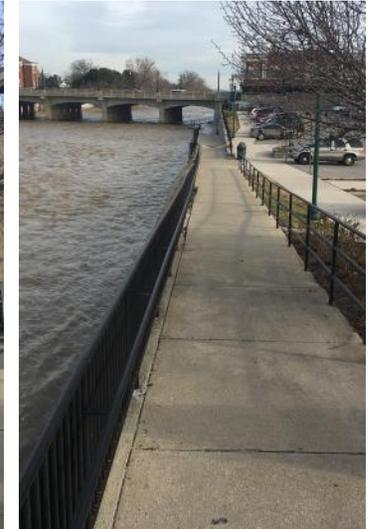


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Downtown Scale, Possibly with Some Opportunities for Treatment of Blank Walls
The City of Monroe | Monroe County | SEM Prosperity Region 09



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Northern Gateway Areas with Potential for Placemaking Improvements
The City of Monroe and Vicinity | Monroe Co. | SEM Prosperity Region 09



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Southern Gateway Areas with Potential for Placemaking Improvements
The City of Monroe and Vicinity | Monroe Co. | SEM Prosperity Region 09



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Selected Active Downtown Retail Frontages with Engaging Characteristics
The City of Monroe | Monroe County | SEM Prosperity Region 09



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Investment Opportunities for Neighborhood Scale Mixed-Use Development
The City of Monroe | Monroe County | SEM Prosperity Region 09



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Opportunities for Horizontal Infill or Vertical (upward) Expansion
The City of Monroe | Monroe County | SEM Prosperity Region 09

Exhibit E.8



Unique Commercial Signage Contributing to Sense of Place
The City of Monroe | Monroe County | SEM Prosperity Region 09

Exhibit E.9

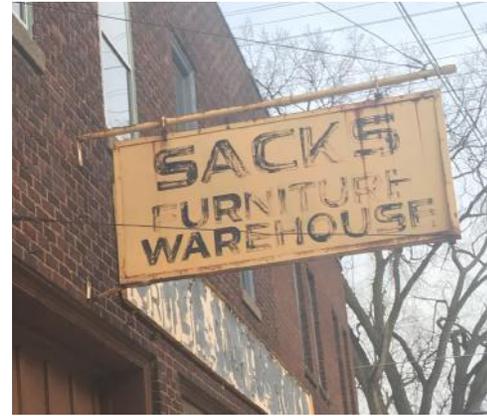


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Photo credit (lower right): www.roadarch.com [Rexall sign is no longer present]

Recent Rehabilitations of Downtown Commercial Buildings | Before and After
The City of Monroe | Monroe County | SEM Prosperity Region 09

Exhibit E.10



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Section **F**
Retail Industry Trends

Prepared by:



LandUseUSA



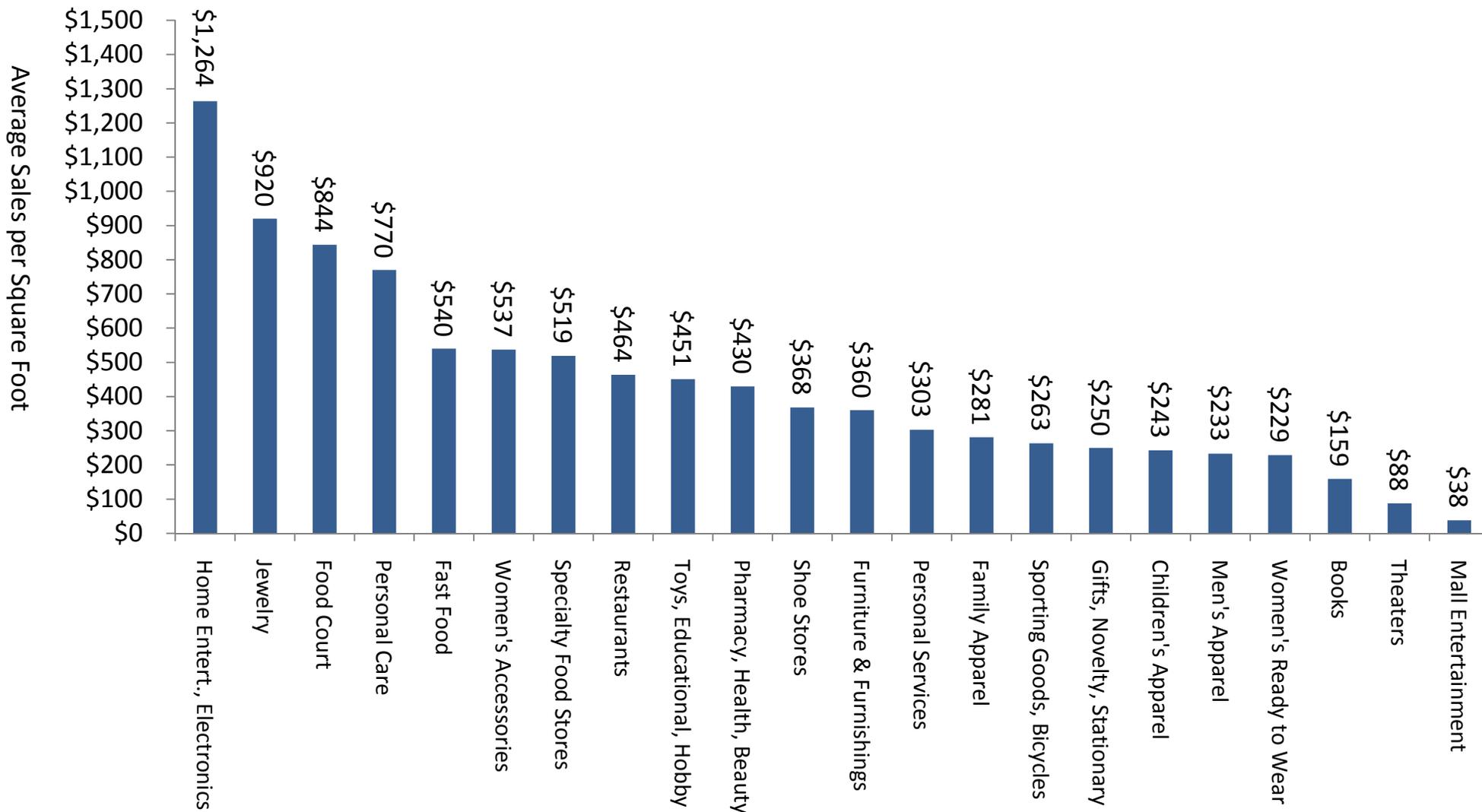
seamless collaborative
urbanism + design + economics

Prepared for:



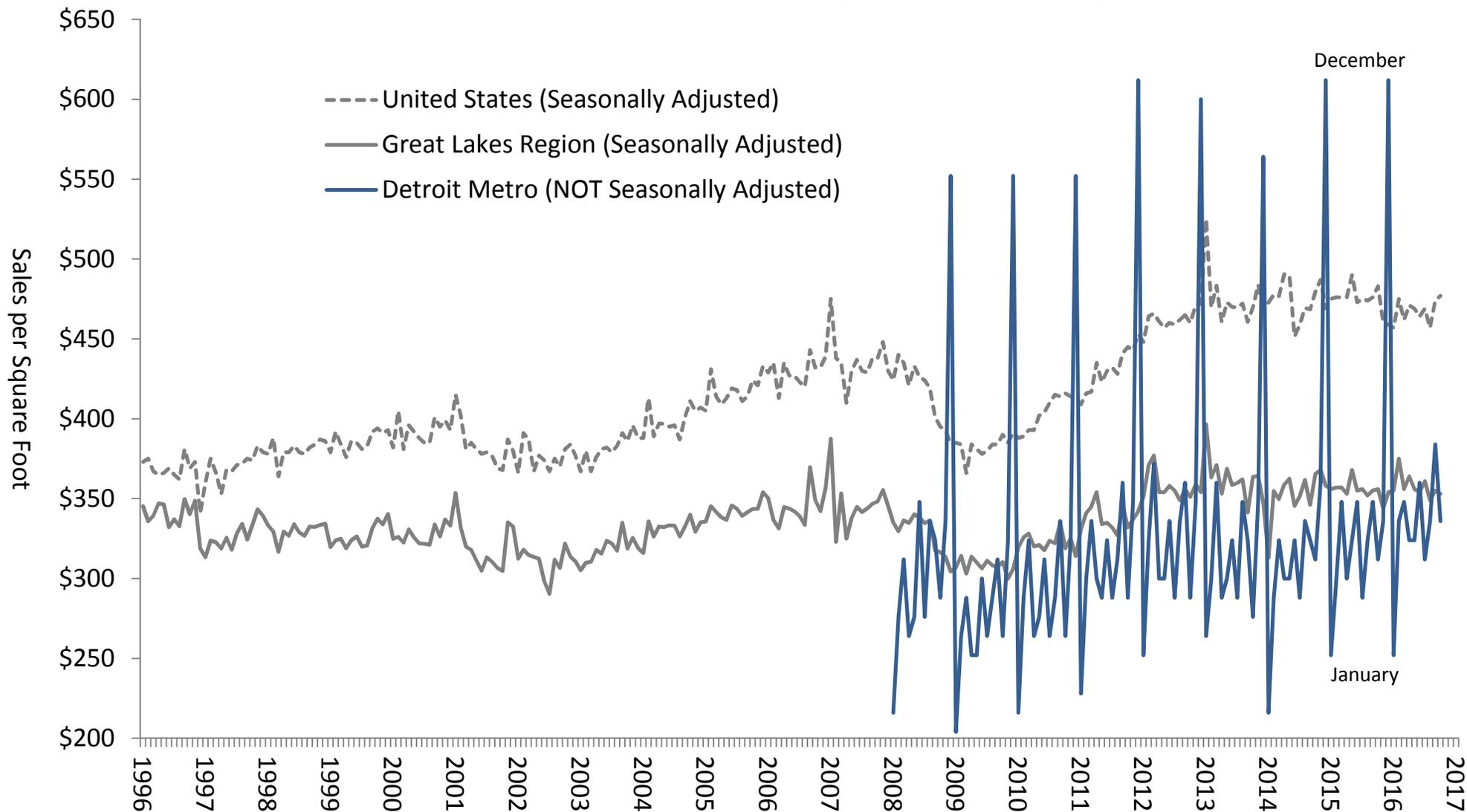
City of Monroe
Monroe, Michigan
Incorporated in 1837

Average Sales per Square Foot by Retail Category
 Non-anchor Retail Tenants | Seasonally Adjusted Thru Nov. 2016
 Great Lakes Region including Michigan



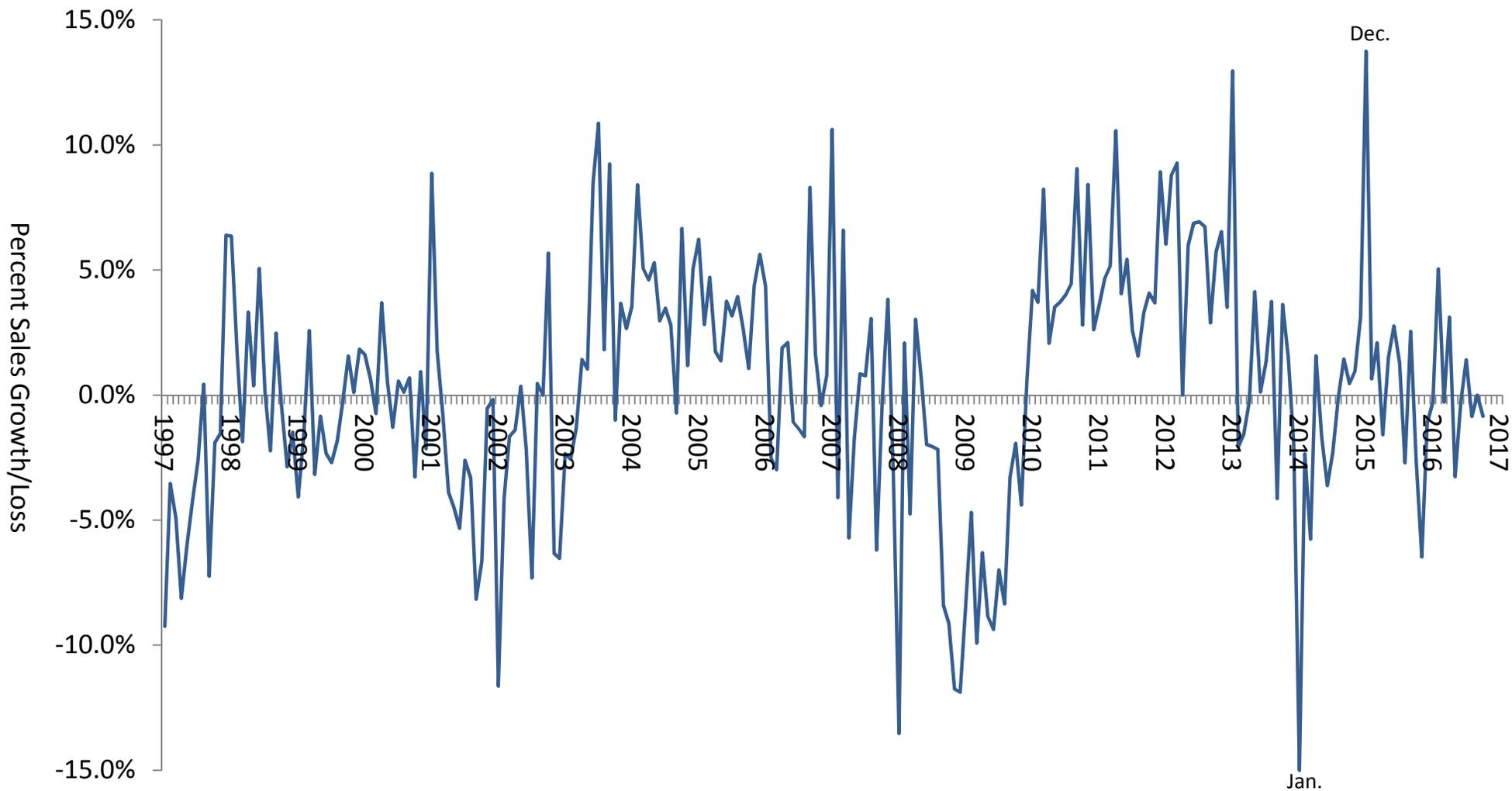
Source: Sales tracking by the International Council of Shopping Centers Research Department; analysis and exhibit prepared by LandUseUSA (c) 2016. Figures are seasonally adjusted through Nov. 2016.

Month-to-Month Sales Productivity | Sales per Square Foot
 Non-Anchor Retail Tenants | Thru October 2016
 Detroit Metro and the Great Lakes Region including Michigan



Source: Sales tracking by the International Council of Shopping Centers Research Department.
 Analysis by LandUseUSA (c) 2016. The USA and Michigan data are seasonally adjusted; but the Detroit data is not.

Same-Store Monthly Sales Growth/Loss v. Prior Year Non-anchor Retail Tenants | Thru October 2016 Great Lakes Region including Michigan



Source: Data provided by the International Council of Shopping Centers (ICSC) Research Department; analysis and exhibit prepared by LandUseUSA (c) 2016.



Section **G**
Import-Export Analysis

Prepared by:



LandUseUSA



seamless collaborative
urbanism + design + economics

Prepared for:



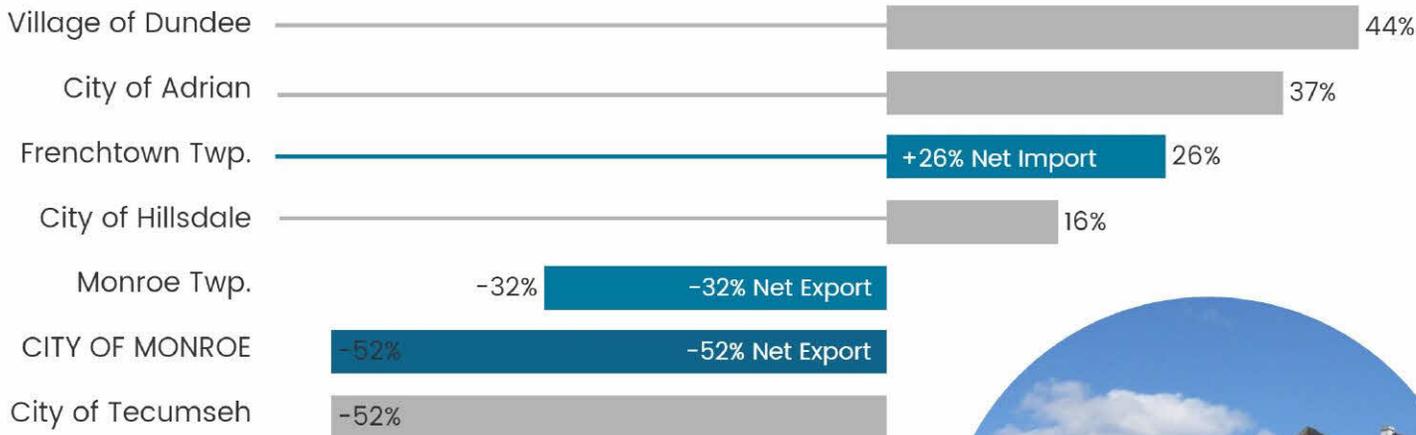
City of Monroe
Monroe, Michigan
Incorporated in 1837

Retail Import-Export Analysis

A study of transacted retail sales versus expenditure potential.

The City of Monroe, Michigan

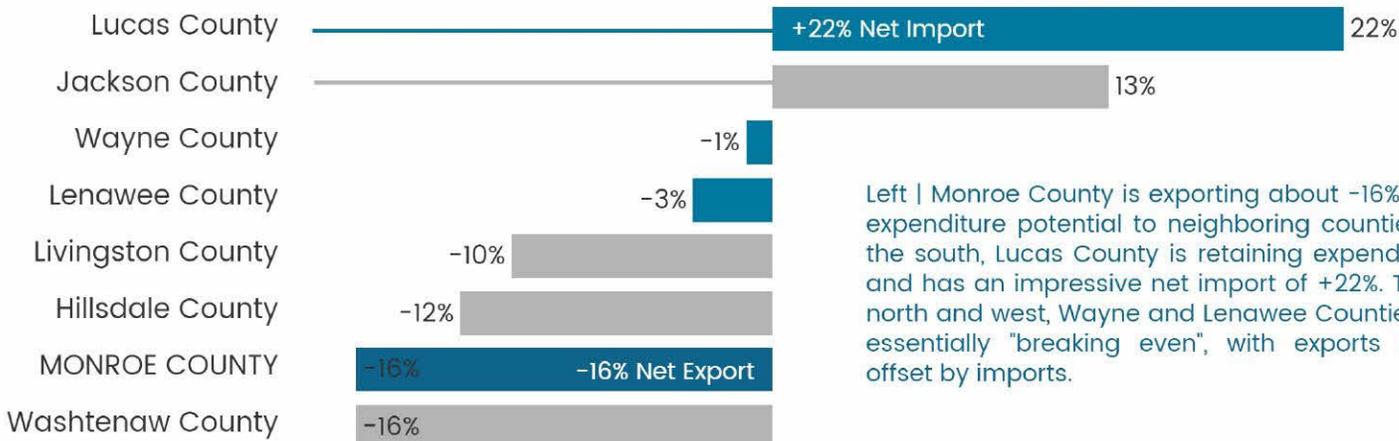
Annual Net Import and Export Total Retail Trade | NAICS 44-45 Comparisons by Place



Above | The City of Monroe is exporting over 50% of its expenditure potential to other places, and particularly to Frenchtown Township and the Village of Dundee. There is an opportunity and a need to intercept some of the leakage by improving downtown choices, with clusters in three main categories: a) restaurants, b) unique food services, and c) apparel. Additional explanation of the methodology is provided in the complete narrative report.



Annual Net Import and Export Total Retail Trade | NAICS 44-45 Comparisons by County



Left | Monroe County is exporting about -16% of its expenditure potential to neighboring counties. To the south, Lucas County is retaining expenditures and has an impressive net import of +22%. To the north and west, Wayne and Lenawee Counties are essentially "breaking even", with exports being offset by imports.



Total Retail Sales and Import-Export Analysis | NAICS Categories 44-45
 The City of Monroe with Comparisons | SEM Region 9

| Total Retail | No. of Estab. (#) | Transacted Sales or Revenues (\$1,000) | Potential Sales or Revenues (\$1,000) | Average Sales per Estab. (\$Mil.) | Estim. Population (#) | Estimated Per Capita Income (\$) | Estim. Sales per Capita (\$) | Market Share (%) | Net Import (%) | Net Export (%) | Place Name |
|--------------|-------------------|--|---------------------------------------|-----------------------------------|-----------------------|----------------------------------|------------------------------|------------------|----------------|----------------|-------------------|
| 44-45 | 21 | \$143,700 | \$80,100 | \$6.8 | 3,950 | \$23,604 | \$36,387 | 154.2% | 44% | . | Village of Dundee |
| | 118 | \$509,000 | \$318,800 | \$4.3 | 20,878 | \$17,769 | \$24,381 | 137.2% | 37% | . | City of Adrian |
| | 96 | \$543,800 | \$409,500 | \$5.7 | 20,134 | \$23,666 | \$27,009 | 114.1% | 25% | . | Frenchtown Twp |
| | 49 | \$142,100 | \$118,800 | \$2.9 | 8,203 | \$16,851 | \$17,319 | 102.8% | 16% | . | City of Hillsdale |
| | 52 | \$222,100 | \$324,400 | \$4.3 | 14,387 | \$26,238 | \$15,436 | 58.8% | . | -32% | Monroe Twp |
| | 77 | \$189,600 | \$397,500 | \$2.5 | 20,335 | \$22,744 | \$9,324 | 41.0% | . | -52% | City of Monroe |
| | 39 | \$92,100 | \$193,100 | \$2.4 | 8,393 | \$26,772 | \$10,971 | 41.0% | . | -52% | City of Tecumseh |
| | 452 | \$1,842,400 | \$1,842,200 | \$4.1 | 96,280 | \$22,264 | \$19,136 | 85.9% | . | . | 7 Places Combined |
| 44-45 | 1,459 | \$5,977,900 | \$4,656,900 | \$4.1 | 436,261 | \$24,816 | \$13,703 | 55.2% | 22% | . | Lucas Co., Ohio |
| | 526 | \$1,841,700 | \$1,606,500 | \$3.5 | 159,759 | \$23,377 | \$11,528 | 49.3% | 13% | . | Jackson County |
| | 6,091 | \$17,409,400 | \$17,521,300 | \$2.9 | 1,778,969 | \$22,897 | \$9,786 | 42.7% | . | -1% | Wayne County |
| | 304 | \$961,600 | \$989,200 | \$3.2 | 98,902 | \$23,252 | \$9,723 | 41.8% | . | -3% | Lenawee County |
| | 599 | \$2,410,200 | \$2,669,400 | \$4.0 | 184,591 | \$33,619 | \$13,057 | 38.8% | . | -10% | Livingston County |
| | 139 | \$370,200 | \$422,900 | \$2.7 | 46,178 | \$21,291 | \$8,017 | 37.7% | . | -12% | Hillsdale County |
| | 1,106 | \$4,461,100 | \$5,291,000 | \$4.0 | 354,092 | \$34,738 | \$12,599 | 36.3% | . | -16% | Washtenaw County |
| | 377 | \$1,471,200 | \$1,746,000 | \$3.9 | 150,436 | \$26,982 | \$9,779 | 36.2% | . | -16% | Monroe County |
| | 10,601 | \$34,903,300 | \$34,903,200 | \$3.3 | 3,209,188 | \$25,284 | \$10,876 | 43.0% | . | . | 8 County Total |
| | 34,858 | \$119,302,000 | \$119,302,000 | \$3.4 | 9,900,571 | \$26,602 | \$12,050 | 45.3% | . | . | State of Michigan |

Sources: 2012 Economic Census and 2011-2015 American Community Survey (5-yr estimates).
 NAICS indicates the North American Industrial Classification Industry as defined by the U.S. Census.
 Transacted Retail Sales includes import from visitors, travelers, and other non-residents.
 Potential Retail Sales excludes import and reflect the expenditure potential of local residents only.
 Analysis and exhibit prepared by Seamless Collaborative in partnership with LandUseUSA, 2017.

Transacted Retail Sales and Market Share Analysis | NAICS Categories 441 and 444
 The City of Monroe with Comparisons | SEM Region 9

| NAICS | No. of Estab. (#) | Transacted Sales or Revenues (\$1,000) | Potential Sales or Revenues (\$1,000) | Average Sales per Estab. (\$Mil.) | Estim. Population (#) | Estimated Per Capita Income (\$) | Estim. Sales per Capita (\$) | Market Share (%) | Net Import (%) | Net Export (%) | Place Name |
|-------|-------------------|--|---------------------------------------|-----------------------------------|-----------------------|----------------------------------|------------------------------|------------------|----------------|----------------|-------------------|
| 441 | 10 | \$58,500 | \$28,000 | \$5.9 | 8,203 | \$16,851 | \$7,135 | 42.3% | 51% | . | City of Hillsdale |
| | 15 | \$123,900 | \$76,000 | \$8.3 | 20,878 | \$17,769 | \$5,932 | 33.4% | 38% | . | City of Adrian |
| | 9 | \$115,500 | \$78,000 | \$12.8 | 14,387 | \$26,238 | \$8,031 | 30.6% | 33% | . | Monroe Twp |
| | 9 | \$107,400 | \$98,000 | \$11.9 | 20,134 | \$23,666 | \$5,335 | 22.5% | 9% | . | Frenchtown Twp |
| | 7 | \$12,300 | \$95,000 | \$1.8 | 20,335 | \$22,744 | \$606 | 2.7% | . | -87% | City of Monroe |
| | 5 | \$4,400 | \$46,000 | \$0.9 | 8,393 | \$26,772 | \$522 | 1.9% | . | -91% | City of Tecumseh |
| | 55 | \$422,000 | \$421,000 | \$7.7 | 92,330 | \$22,207 | \$4,571 | 20.6% | . | . | 6 Places Combined |
| | 40 | \$289,900 | . | \$7.2 | 150,436 | \$26,982 | \$1,927 | 7.1% | . | . | Monroe County |
| 444 | 11 | \$56,100 | . | \$5.1 | 20,878 | \$17,769 | \$2,685 | 15.1% | . | . | City of Adrian |
| | 4 | \$11,100 | . | \$2.8 | 3,950 | \$23,604 | \$2,819 | 11.9% | . | . | Village of Dundee |
| | 7 | \$12,300 | . | \$1.8 | 20,335 | \$22,744 | \$606 | 2.7% | . | . | City of Monroe |
| | 4 | \$8,600 | . | \$2.1 | 8,393 | \$26,772 | \$1,019 | 3.8% | . | . | City of Tecumseh |
| | 33 | \$136,100 | . | \$4.1 | 150,436 | \$26,982 | \$905 | 3.4% | . | . | Monroe County |

Sources: 2012 Economic Census and 2011-2015 American Community Survey (5-yr estimates).

NAICS indicates the North American Industrial Classification Industry as defined by the U.S. Census.

Transacted Retail Sales includes import from visitors, travelers, and other non-residents.

Analysis and exhibit prepared by Seamless Collaborative in partnership with LandUseUSA, 2017.

Transacted Retail Sales and Market Share Analysis | NAICS Category 445
 The City of Monroe with Comparisons | SEM Region 9

| NAICS | No. of Estab. (#) | Transacted Sales or Revenues (\$1,000) | Potential Sales or Revenues (\$1,000) | Average Sales per Estab. (\$Mil.) | Estim. Pop- ulation (#) | Estimated Per Capita Income (\$) | Estim. Sales per Capita (\$) | Market Share (%) | Net Import (%) | Net Export (%) | Place Name |
|-------|-------------------------|---|--|--|----------------------------------|---|---------------------------------------|------------------------|----------------------|----------------------|-------------------|
| 445 | 8 | \$54,300 | \$38,000 | \$6.8 | 14,387 | \$26,238 | \$3,772 | 14.4% | 30% | . | Monroe Twp |
| | 6 | \$26,400 | \$23,000 | \$4.4 | 8,393 | \$26,772 | \$3,148 | 11.8% | 15% | . | City of Tecumseh |
| | 11 | \$43,100 | \$37,000 | \$3.9 | 20,878 | \$17,769 | \$2,065 | 11.6% | 14% | . | City of Adrian |
| | 13 | \$49,400 | \$48,000 | \$3.8 | 20,134 | \$23,666 | \$2,453 | 10.4% | 3% | . | Frenchtown Twp |
| | 12 | \$18,300 | \$46,000 | \$1.5 | 20,335 | \$22,744 | \$901 | 4.0% | . | -60% | City of Monroe |
| | 50 | \$191,500 | \$192,000 | \$3.8 | 84,127 | \$22,729 | \$2,276 | 10.0% | . | . | 5 Places Combined |
| | 69 | \$233,900 | . | \$3.4 | 150,436 | \$26,982 | \$1,555 | 5.8% | . | . | Monroe County |
| 4451 | 3 | \$32,400 | . | \$10.8 | 8,203 | \$16,851 | \$3,950 | 23.4% | . | . | City of Hillsdale |
| | 7 | \$40,500 | . | \$5.8 | 20,878 | \$17,769 | \$1,938 | 10.9% | . | . | City of Adrian |
| | 8 | \$46,400 | . | \$5.8 | 20,134 | \$23,666 | \$2,306 | 9.7% | . | . | Frenchtown Twp |
| | 8 | \$13,800 | . | \$1.7 | 20,335 | \$22,744 | \$678 | 3.0% | . | . | City of Monroe |
| | 39 | \$207,100 | . | \$5.3 | 150,436 | \$26,982 | \$1,377 | 5.1% | . | . | Monroe County |

Sources: 2012 Economic Census and 2011-2015 American Community Survey (5-yr estimates).

NAICS indicates the North American Industrial Classification Industry as defined by the U.S. Census.

Transacted Retail Sales includes import from visitors, travelers, and other non-residents.

Analysis and exhibit prepared by Seamless Collaborative in partnership with LandUseUSA, 2017.

Transacted Retail Sales and Market Share Analysis | NAICS Category 446
 The City of Monroe with Comparisons | SEM Region 9

| NAICS | No. of Estab. (#) | Transacted Sales or Revenues (\$1,000) | Potential Sales or Revenues (\$1,000) | Average Sales per Estab. (\$Mil.) | Estim. Population (#) | Estimated Per Capita Income (\$) | Estim. Sales per Capita (\$) | Market Share (%) | Net Import (%) | Net Export (%) | Place Name |
|-------|-------------------|--|---------------------------------------|-----------------------------------|-----------------------|----------------------------------|------------------------------|------------------|----------------|----------------|-------------------|
| 446 | 12 | \$41,600 | \$31,000 | \$3.5 | 20,335 | \$22,744 | \$2,047 | 9.0% | 25% | . | City of Monroe |
| | 14 | \$32,600 | \$25,000 | \$2.3 | 20,878 | \$17,769 | \$1,563 | 8.8% | 24% | . | City of Adrian |
| | 4 | \$18,400 | \$15,000 | \$4.6 | 8,393 | \$26,772 | \$2,191 | 8.2% | 18% | . | City of Tecumseh |
| | 9 | \$10,600 | \$32,000 | \$1.2 | 20,134 | \$23,666 | \$524 | 2.2% | . | -67% | Frenchtown Twp |
| | 39 | \$103,200 | \$103,000 | \$2.6 | 69,740 | \$22,006 | \$1,480 | 6.7% | . | . | 4 Places Combined |
| | 36 | \$105,100 | . | \$2.9 | 150,436 | \$26,982 | \$698 | 2.6% | . | . | Monroe County |
| 44611 | 9 | \$39,600 | . | \$4.4 | 20,335 | \$22,744 | \$1,945 | 8.6% | . | . | City of Monroe |
| | 4 | \$27,400 | . | \$6.9 | 20,878 | \$17,769 | \$1,313 | 7.4% | . | . | City of Adrian |
| | 22 | \$97,300 | . | \$4.4 | 150,436 | \$26,982 | \$647 | 2.4% | . | . | Monroe County |

Sources: 2012 Economic Census and 2011-2015 American Community Survey (5-yr estimates).

NAICS indicates the North American Industrial Classification Industry as defined by the U.S. Census.

Transacted Retail Sales includes import from visitors, travelers, and other non-residents.

Analysis and exhibit prepared by Seamless Collaborative in partnership with LandUseUSA, 2017.

Transacted Retail Sales and Market Share Analysis | NAICS Categories 447 and 448
 The City of Monroe with Comparisons | SEM Region 9

| NAICS | No. of Estab. (#) | Transacted Sales or Revenues (\$1,000) | Potential Sales or Revenues (\$1,000) | Average Sales per Estab. (\$Mil.) | Estim. Population (#) | Estimated Per Capita Income (\$) | Estim. Sales per Capita (\$) | Market Share (%) | Net Import (%) | Net Export (%) | Place Name |
|-------|-------------------|--|---------------------------------------|-----------------------------------|-----------------------|----------------------------------|------------------------------|------------------|----------------|----------------|-------------------|
| 447 | 5 | \$29,700 | . | \$5.9 | 3,950 | \$23,604 | \$7,520 | 31.9% | . | . | Village of Dundee |
| | 10 | \$84,200 | . | \$8.4 | 20,134 | \$23,666 | \$4,180 | 17.7% | . | . | Frenchtown Twp |
| | 4 | \$65,800 | . | \$16.4 | 20,335 | \$22,744 | \$3,234 | 14.2% | . | . | City of Monroe |
| | 7 | \$39,400 | . | \$5.6 | 20,878 | \$17,769 | \$1,889 | 10.6% | . | . | City of Adrian |
| | 8 | \$29,700 | . | \$3.7 | 14,387 | \$26,238 | \$2,064 | 7.9% | . | . | Monroe Twp |
| | 43 | \$327,000 | . | \$7.6 | 150,436 | \$26,982 | \$2,173 | 8.1% | . | . | Monroe County |
| 448 | 16 | \$16,700 | \$11,000 | \$1.0 | 20,134 | \$23,666 | \$829 | 3.5% | 36% | . | Frenchtown Twp |
| | 14 | \$10,600 | \$8,000 | \$0.8 | 20,878 | \$17,769 | \$506 | 2.8% | 21% | . | City of Adrian |
| | 6 | \$6,300 | \$10,000 | \$1.1 | 20,335 | \$22,744 | \$311 | 1.4% | . | -39% | City of Monroe |
| | 5 | \$4,200 | \$8,000 | \$0.8 | 14,387 | \$26,238 | \$292 | 1.1% | . | -50% | Monroe Twp |
| | 41 | \$37,800 | \$37,000 | \$0.9 | 75,734 | \$22,281 | \$499 | 2.2% | . | . | 4 Places Combined |
| | 30 | \$28,400 | . | \$0.9 | 150,436 | \$26,982 | \$189 | 0.7% | . | . | Monroe County |

Sources: 2012 Economic Census and 2011-2015 American Community Survey (5-yr estimates).

NAICS indicates the North American Industrial Classification Industry as defined by the U.S. Census.

Transacted Retail Sales includes import from visitors, travelers, and other non-residents.

Analysis and exhibit prepared by Seamless Collaborative in partnership with LandUseUSA, 2017.

Transacted Retail Sales and Market Share Analysis | NAICS Categories 453 and 71
 The City of Monroe with Comparisons | SEM Region 9

| NAICS | No. of Estab. (#) | Transacted Sales or Revenues (\$1,000) | Potential Sales or Revenues (\$1,000) | Average Sales per Estab. (\$Mil.) | Estim. Population (#) | Estimated Per Capita Income (\$) | Estim. Sales per Capita (\$) | Market Share (%) | Net Import (%) | Net Export (%) | Place Name |
|-------|-------------------|--|---------------------------------------|-----------------------------------|-----------------------|----------------------------------|------------------------------|------------------|----------------|----------------|-------------------|
| 453 | 16 | \$10,700 | \$6,000 | \$0.7 | 20,878 | \$17,769 | \$514 | 2.9% | 49% | . | City of Adrian |
| | 12 | \$8,500 | \$7,000 | \$0.7 | 20,335 | \$22,744 | \$419 | 1.8% | 19% | . | City of Monroe |
| | 7 | \$7,700 | \$7,000 | \$1.1 | 20,134 | \$23,666 | \$380 | 1.6% | 7% | . | Frenchtown Twp |
| | 5 | \$900 | \$1,000 | \$0.2 | 3,950 | \$23,604 | \$222 | 0.9% | . | -37% | Village of Dundee |
| | 4 | \$1,400 | \$3,000 | \$0.3 | 8,393 | \$26,772 | \$163 | 0.6% | . | -59% | City of Tecumseh |
| | 7 | \$800 | \$6,000 | \$0.1 | 14,387 | \$26,238 | \$54 | 0.2% | . | -86% | Monroe Twp |
| | 51 | \$30,000 | \$30,000 | \$0.6 | 88,077 | \$22,769 | \$340 | 1.5% | . | . | 6 Places Combined |
| | 44 | \$20,000 | . | \$0.5 | 150,436 | \$26,982 | \$133 | 0.5% | . | . | Monroe County |
| 4539 | 4 | \$6,600 | . | \$1.7 | 20,134 | \$23,666 | \$329 | 1.4% | . | . | Frenchtown Twp |
| | 3 | \$400 | . | \$0.1 | 20,335 | \$22,744 | \$20 | 0.1% | . | . | City of Monroe |
| | 19 | \$8,500 | . | \$0.4 | 150,436 | \$26,982 | \$57 | 0.2% | . | . | Monroe County |
| 71 | 8 | \$5,400 | . | \$0.7 | 20,335 | \$22,744 | \$263 | 1.2% | . | . | City of Monroe |
| | 9 | \$4,000 | . | \$0.4 | 14,387 | \$26,238 | \$279 | 1.1% | . | . | Monroe Twp |
| | 5 | \$4,300 | . | \$0.9 | 20,134 | \$23,666 | \$212 | 0.9% | . | . | Frenchtown Twp |
| | 5 | \$1,000 | . | \$0.2 | 8,203 | \$16,851 | \$122 | 0.7% | . | . | City of Hillsdale |
| | 58 | \$32,600 | . | \$0.6 | 150,436 | \$26,982 | \$217 | 0.8% | . | . | Monroe County |

Sources: 2012 Economic Census and 2011-2015 American Community Survey (5-yr estimates).

NAICS indicates the North American Industrial Classification Industry as defined by the U.S. Census.

Transacted Retail Sales includes import from visitors, travelers, and other non-residents.

Analysis and exhibit prepared by Seamless Collaborative in partnership with LandUseUSA, 2017.

Transacted Retail Sales and Market Share Analysis | NAICS Category 72
 The City of Monroe with Comparisons | SEM Region 9

| NAICS | No. of Estab. (#) | Transacted Sales or Revenues (\$1,000) | Potential Sales or Revenues (\$1,000) | Average Sales per Estab. (\$Mil.) | Estim. Population (#) | Estimated Per Capita Income (\$) | Estim. Sales per Capita (\$) | Market Share (%) | Net Import (%) | Net Export (%) | Place Name |
|-------|-------------------|--|---------------------------------------|-----------------------------------|-----------------------|----------------------------------|------------------------------|------------------|----------------|----------------|-------------------|
| 72 | 24 | \$22,100 | \$9,000 | \$0.9 | 3,950 | \$23,604 | \$5,593 | 23.7% | 58% | . | Village of Dundee |
| | 71 | \$55,500 | \$37,000 | \$0.8 | 20,878 | \$17,769 | \$2,660 | 15.0% | 34% | . | City of Adrian |
| | 27 | \$19,600 | \$14,000 | \$0.7 | 8,203 | \$16,851 | \$2,392 | 14.2% | 30% | . | City of Hillsdale |
| | 54 | \$50,100 | \$46,000 | \$0.9 | 20,335 | \$22,744 | \$2,462 | 10.8% | 9% | . | City of Monroe |
| | 23 | \$17,800 | \$22,000 | \$0.8 | 8,393 | \$26,772 | \$2,118 | 7.9% | . | -20% | City of Tecumseh |
| | 42 | \$33,800 | \$47,000 | \$0.8 | 20,134 | \$23,666 | \$1,680 | 7.1% | . | -28% | Frenchtown Twp |
| | 20 | \$13,200 | \$37,000 | \$0.7 | 14,387 | \$26,238 | \$915 | 3.5% | . | -65% | Monroe Twp |
| | 261 | \$212,100 | \$212,000 | \$0.8 | 96,280 | \$22,264 | \$2,203 | 9.9% | . | . | 7 Places Combined |
| | 259 | \$179,900 | . | \$0.7 | 150,436 | \$26,982 | \$1,196 | 4.4% | . | . | Monroe County |
| 721 | 3 | \$4,300 | . | \$1.4 | 20,335 | \$22,744 | \$212 | 0.9% | . | . | City of Monroe |
| | 4 | \$1,900 | . | \$0.5 | 20,134 | \$23,666 | \$93 | 0.4% | . | . | Frenchtown Twp |
| | 24 | \$19,200 | . | \$0.8 | 150,436 | \$26,982 | \$128 | 0.5% | . | . | Monroe County |

Sources: 2012 Economic Census and 2011-2015 American Community Survey (5-yr estimates).

NAICS indicates the North American Industrial Classification Industry as defined by the U.S. Census.

Transacted Retail Sales includes import from visitors, travelers, and other non-residents.

Analysis and exhibit prepared by Seamless Collaborative in partnership with LandUseUSA, 2017.

Transacted Retail Sales and Market Share Analysis | NAICS Category 72
 The City of Monroe with Comparisons | SEM Region 9

| NAICS | No. of Estab. (#) | Transacted Sales or Revenues (\$1,000) | Potential Sales or Revenues (\$1,000) | Average Sales per Estab. (\$Mil.) | Estim. Pop- ulation (#) | Estimated Per Capita Income (\$) | Estim. Sales per Capita (\$) | Market Share (%) | Net Import (%) | Net Export (%) | Place Name |
|-------|-------------------------|---|--|--|----------------------------------|---|---------------------------------------|------------------------|----------------------|----------------------|-------------------|
| 722 | 51 | \$45,800 | . | \$0.9 | 20,335 | \$22,744 | \$2,250 | 9.9% | . | . | City of Monroe |
| | 38 | \$32,000 | . | \$0.8 | 20,134 | \$23,666 | \$1,587 | 6.7% | . | . | Frenchtown Twp |
| | 235 | \$160,700 | . | \$0.7 | 150,436 | \$26,982 | \$1,068 | 4.0% | . | . | Monroe County |
| 7225 | 18 | \$18,600 | \$8,000 | \$1.0 | 3,950 | \$23,604 | \$4,713 | 20.0% | 59% | . | Village of Dundee |
| | 60 | \$45,100 | \$30,000 | \$0.8 | 20,878 | \$17,769 | \$2,162 | 12.2% | 33% | . | City of Adrian |
| | 22 | \$14,300 | \$11,000 | \$0.6 | 8,203 | \$16,851 | \$1,739 | 10.3% | 20% | . | City of Hillsdale |
| | 40 | \$40,600 | \$38,000 | \$1.0 | 20,335 | \$22,744 | \$1,995 | 8.8% | 6% | . | City of Monroe |
| | 32 | \$27,800 | \$39,000 | \$0.9 | 20,134 | \$23,666 | \$1,381 | 5.8% | . | -29% | Frenchtown Twp |
| | 16 | \$11,100 | \$31,000 | \$0.7 | 14,387 | \$26,238 | \$769 | 2.9% | . | -64% | Monroe Twp |
| | 188 | \$157,500 | \$157,000 | \$0.8 | 87,887 | \$21,834 | \$1,792 | 8.2% | . | . | 6 Places Combined |
| | 186 | \$141,900 | . | \$0.8 | 150,436 | \$26,982 | \$943 | 3.5% | . | . | Monroe County |

Sources: 2012 Economic Census and 2011-2015 American Community Survey (5-yr estimates).

NAICS indicates the North American Industrial Classification Industry as defined by the U.S. Census.

Transacted Retail Sales includes import from visitors, travelers, and other non-residents.

Analysis and exhibit prepared by Seamless Collaborative in partnership with LandUseUSA, 2017.

Transacted Retail Sales and Market Share Analysis | NAICS Category 72
 The City of Monroe with Comparisons | SEM Region 9

| NAICS | No. of Estab. (#) | Transacted Sales or Revenues (\$1,000) | Potential Sales or Revenues (\$1,000) | Average Sales per Estab. (\$Mil.) | Estim. Population (#) | Estimated Per Capita Income (\$) | Estim. Sales per Capita (\$) | Market Share (%) | Net Import (%) | Net Export (%) | Place Name |
|--------|-------------------|--|---------------------------------------|-----------------------------------|-----------------------|----------------------------------|------------------------------|------------------|----------------|----------------|-------------------|
| 722513 | 11 | \$9,800 | \$6,000 | \$0.9 | 8,203 | \$16,851 | \$1,198 | 7.1% | 41% | . | City of Hillsdale |
| | 29 | \$22,000 | \$16,000 | \$0.8 | 20,878 | \$17,769 | \$1,056 | 5.9% | 29% | . | City of Adrian |
| | 21 | \$24,000 | \$20,000 | \$1.1 | 20,335 | \$22,744 | \$1,179 | 5.2% | 19% | . | City of Monroe |
| | 8 | \$9,000 | \$9,000 | \$1.1 | 8,393 | \$26,772 | \$1,077 | 4.0% | . | -5% | City of Tecumseh |
| | 18 | \$14,100 | \$20,000 | \$0.8 | 20,134 | \$23,666 | \$703 | 3.0% | . | -30% | Frenchtown Twp |
| | 9 | \$7,500 | \$16,000 | \$0.8 | 14,387 | \$26,238 | \$522 | 2.0% | . | -53% | Monroe Twp |
| | 96 | \$86,400 | \$87,000 | \$0.9 | 92,330 | \$22,207 | \$937 | 4.2% | . | . | 6 Places Combined |
| | 90 | \$77,700 | . | \$0.9 | 150,436 | \$26,982 | \$516 | 1.9% | . | . | Monroe County |

Sources: 2012 Economic Census and 2011-2015 American Community Survey (5-yr estimates).
 NAICS indicates the North American Industrial Classification Industry as defined by the U.S. Census.
 Transacted Retail Sales includes import from visitors, travelers, and other non-residents.
 Analysis and exhibit prepared by Seamless Collaborative in partnership with LandUseUSA, 2017.



Section **H**
Retail Market Share
Monroe County

Prepared by:



LandUseUSA



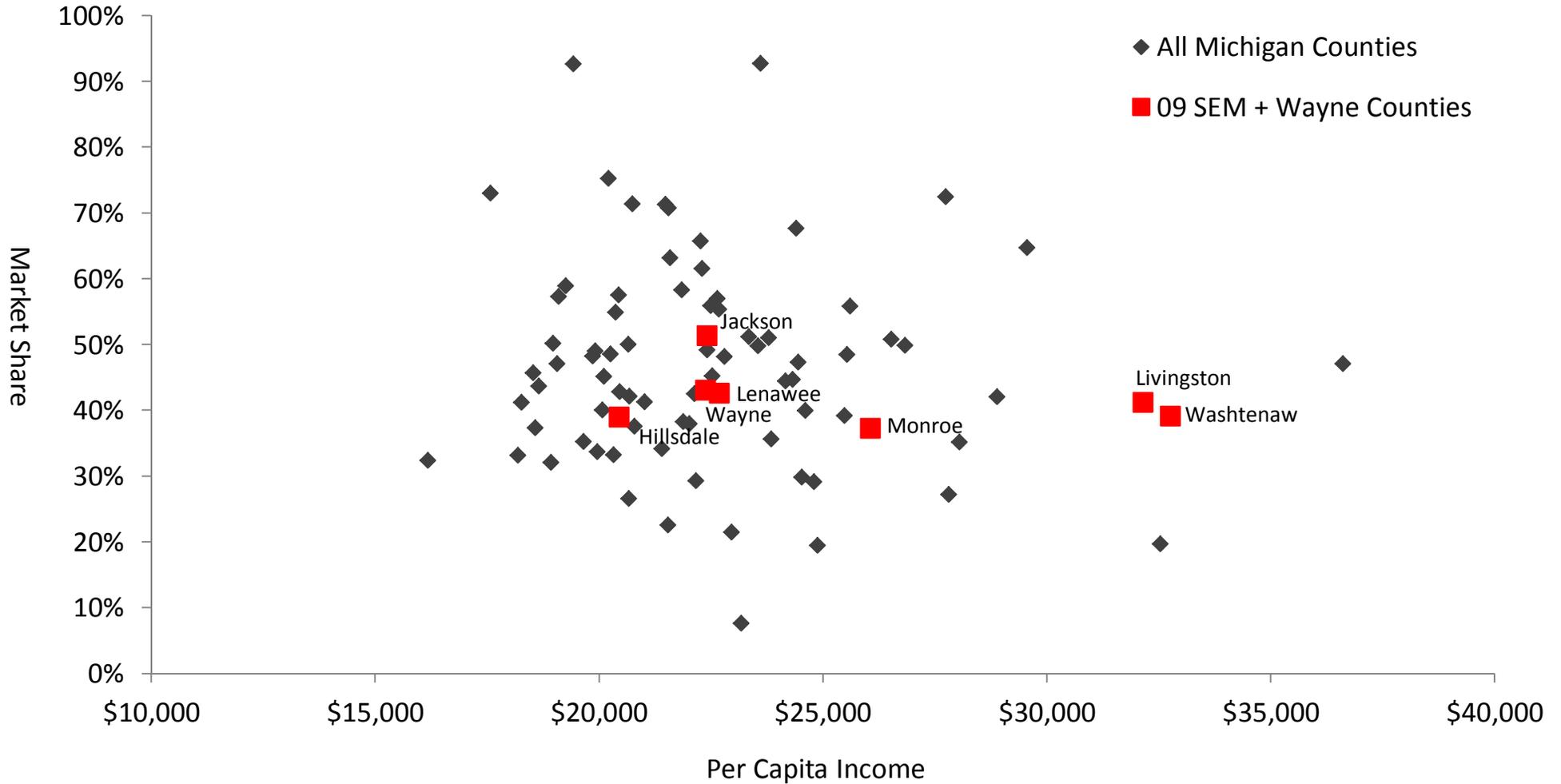
seamless collaborative
urbanism + design + economics

Prepared for:



City of Monroe
Monroe, Michigan
Incorporated in 1837

Market Share v. Per Capita Income Retail Trade | NAICS 44-45 Selected Counties in the State of Michigan

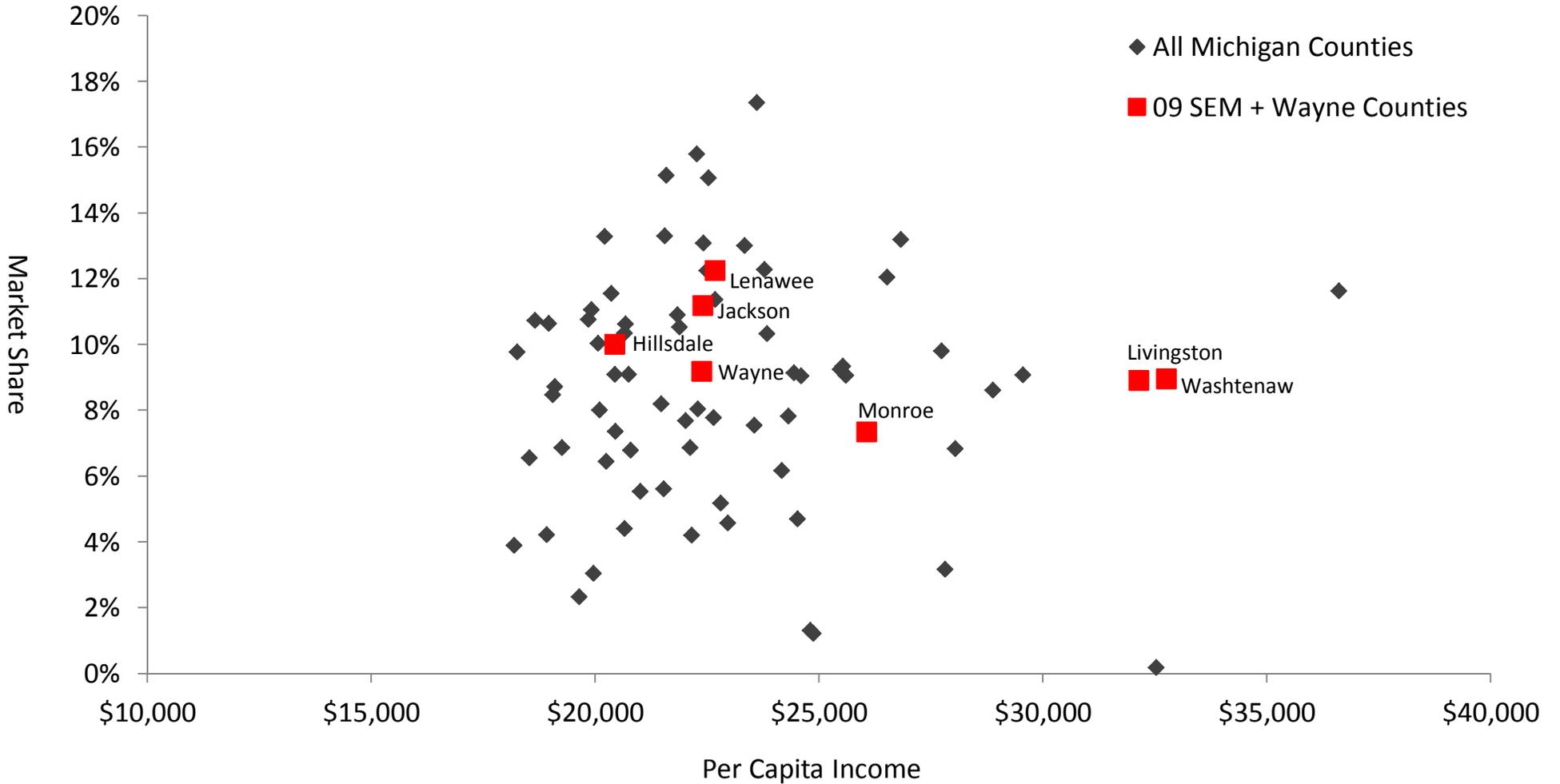


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Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.

Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2014 (5-yr) American Community Survey.

Market Share v. Per Capita Income Motor Vehicle and Parts Dealers | NAICS 441 Selected Counties in the State of Michigan

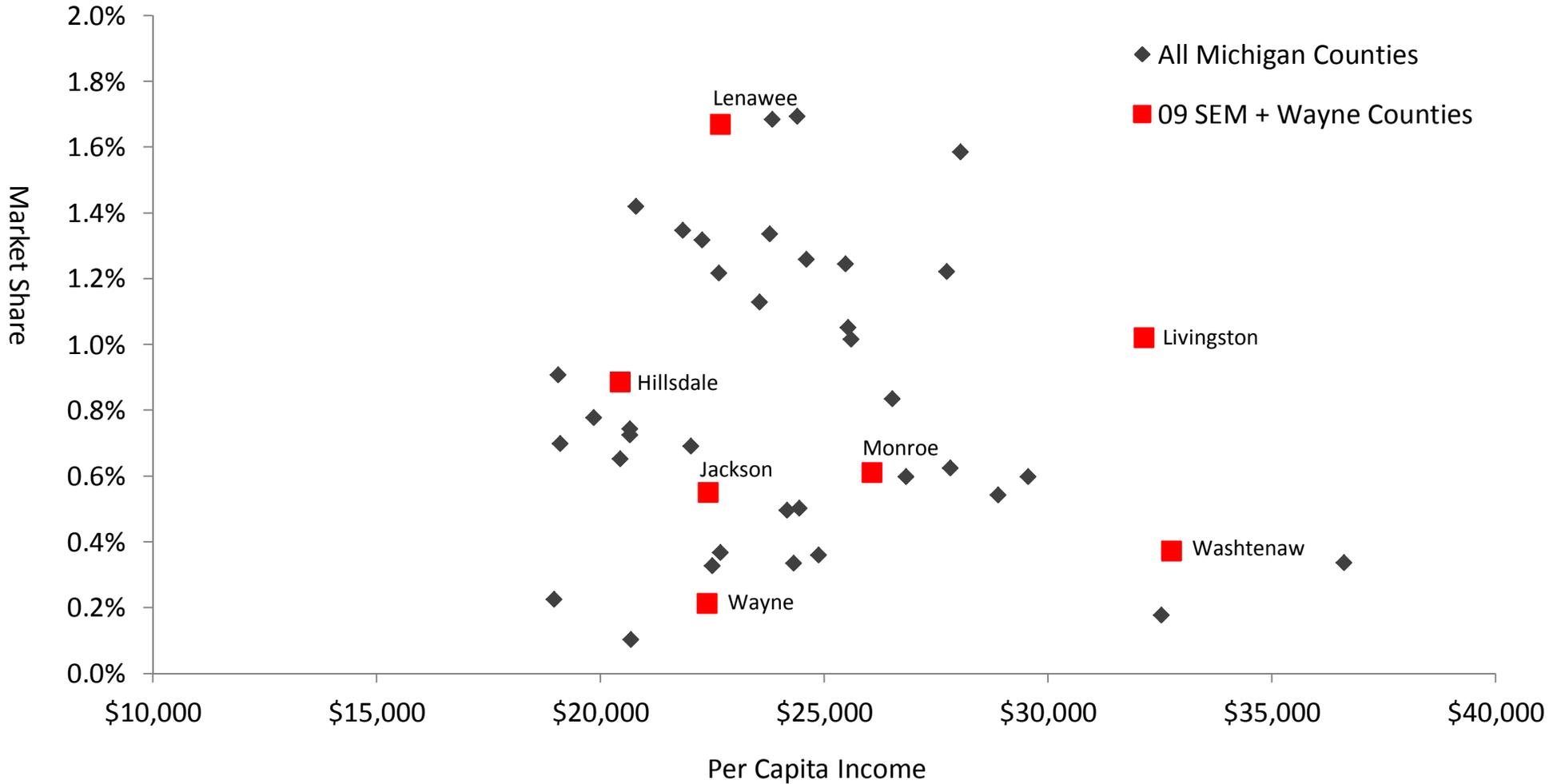


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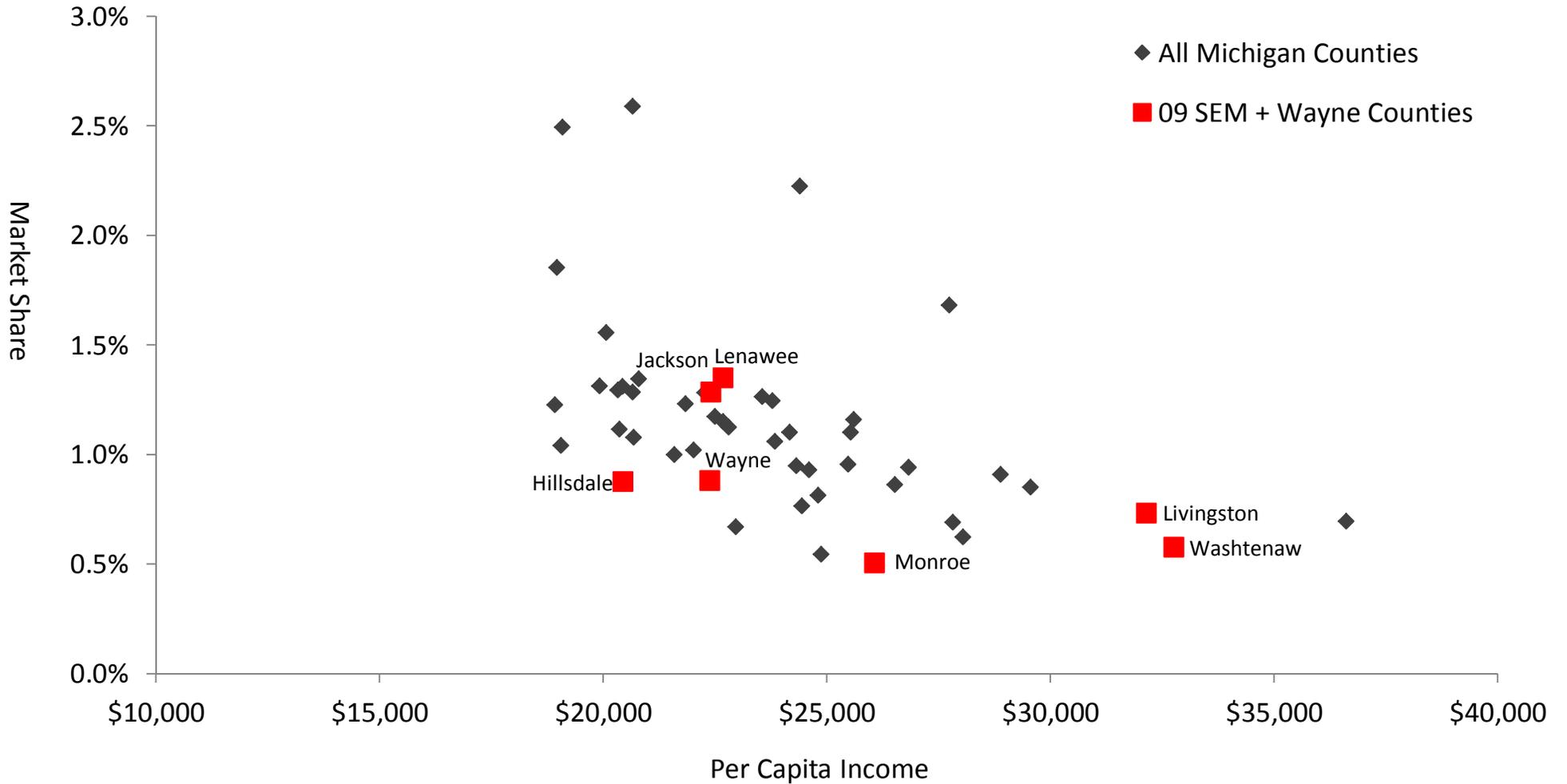
Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography..

Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2014 (5-yr) American Community Survey.

Market Share v. Per Capita Income
 Automotive Dealerships | NAICS 4412
 Selected Counties in the State of Michigan



Market Share v. Per Capita Income Automotive Parts, Tires, Accessories | NAICS 4413 Selected Counties in the State of Michigan

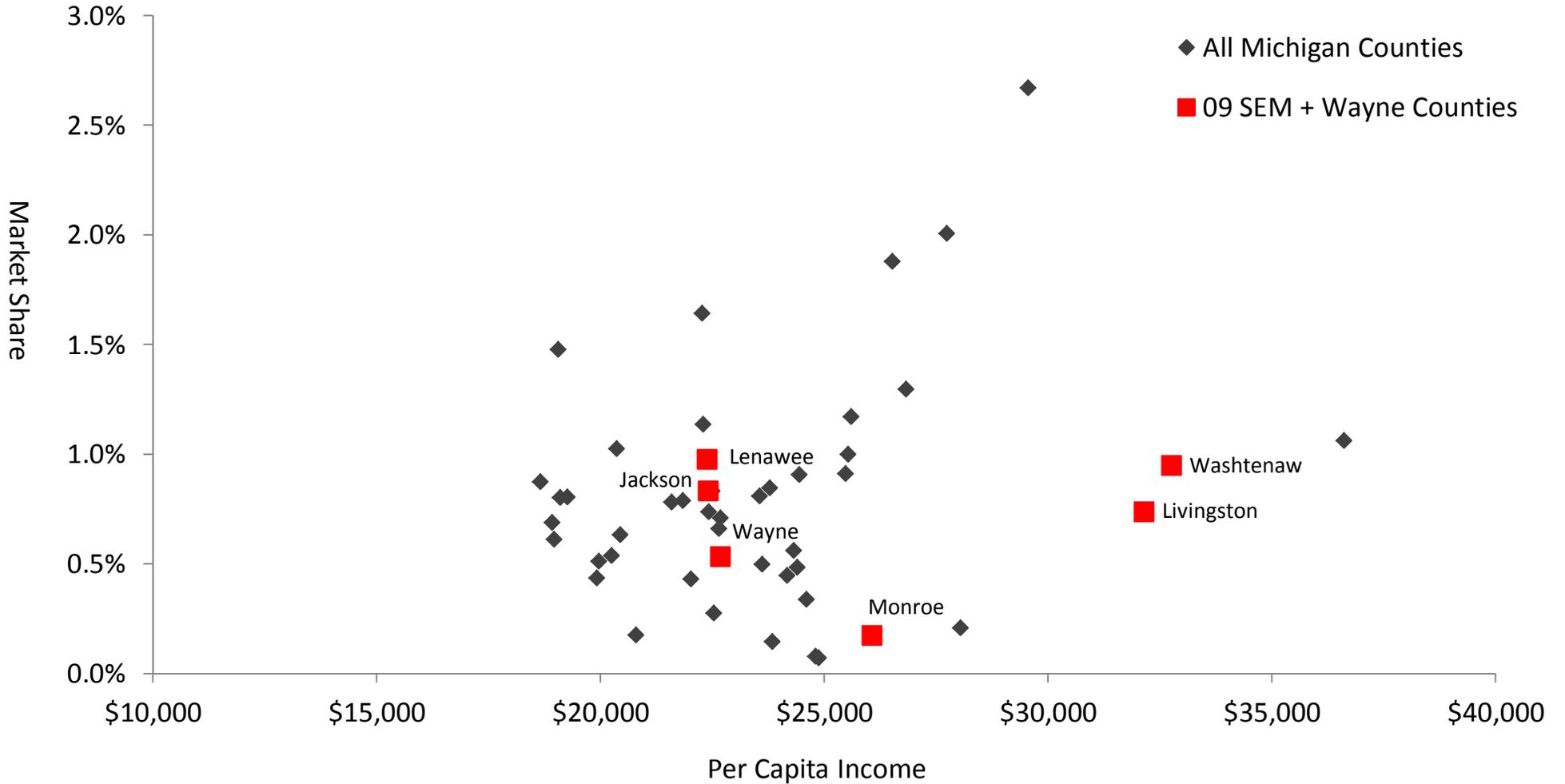


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Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.

Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2014 (5-yr) American Community Survey.

Market Share v. Per Capita Income
 Furniture, Home Furnishings | NAICS 442
 Selected Counties in the State of Michigan

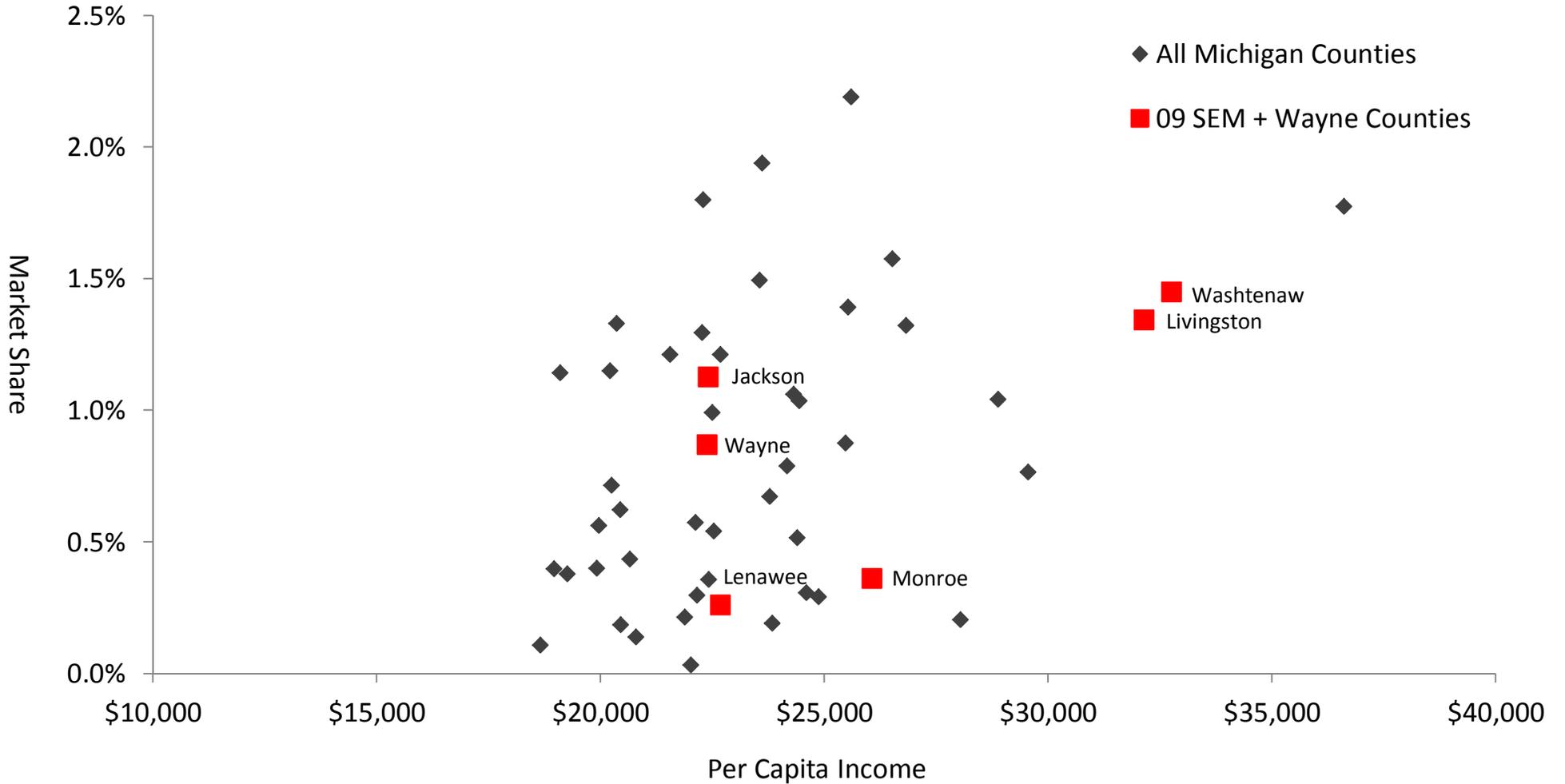


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Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2014 (5-yr) American Community Survey.

Market Share v. Per Capita Income
 Electronics, Appliance Stores | NAICS 443
 Selected Counties in the State of Michigan

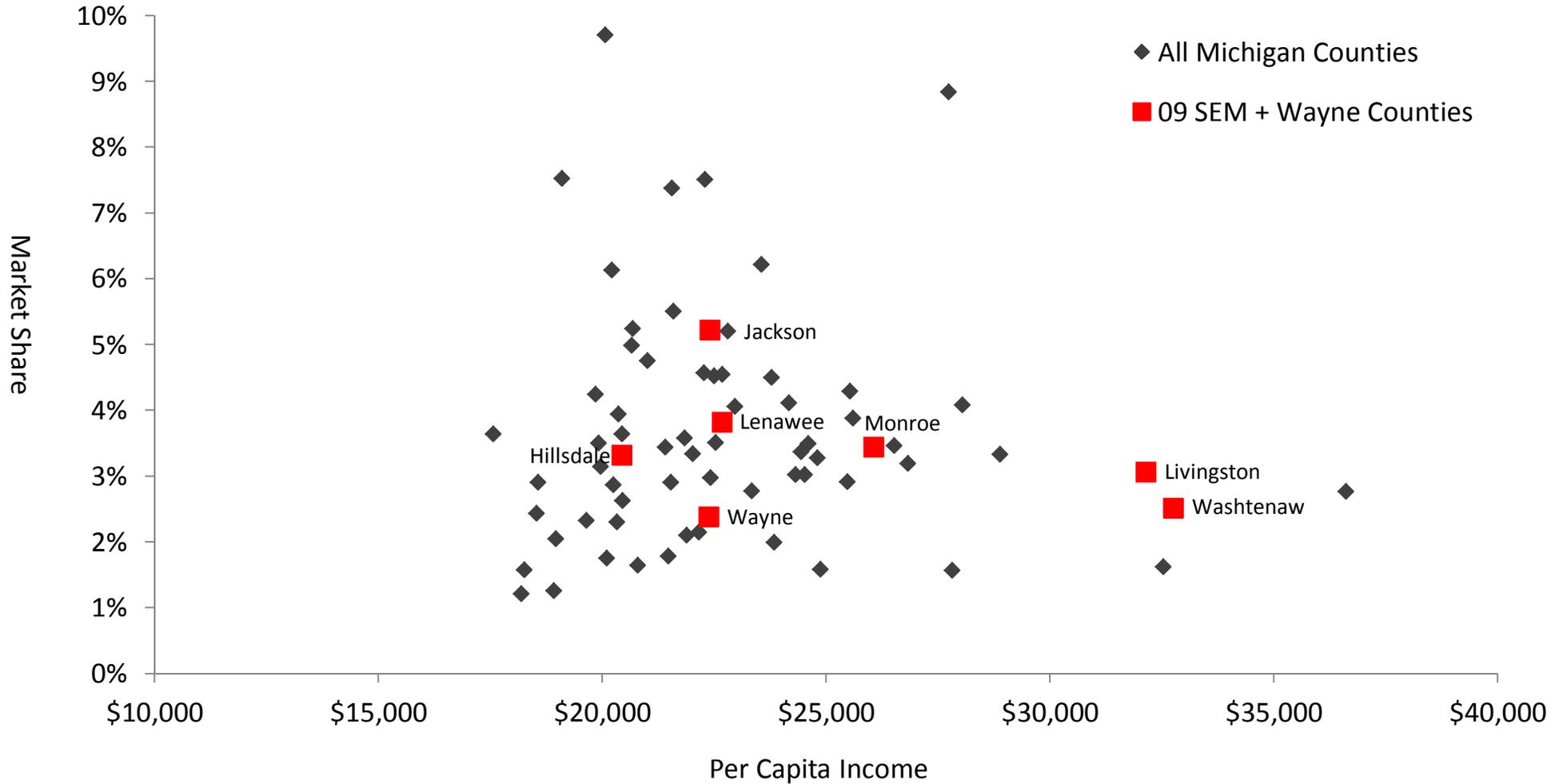


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Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2014 (5-yr) American Community Survey.

Market Share v. Per Capita Income Building and Garden Materials, Supplies | NAICS 444 Selected Counties in the State of Michigan

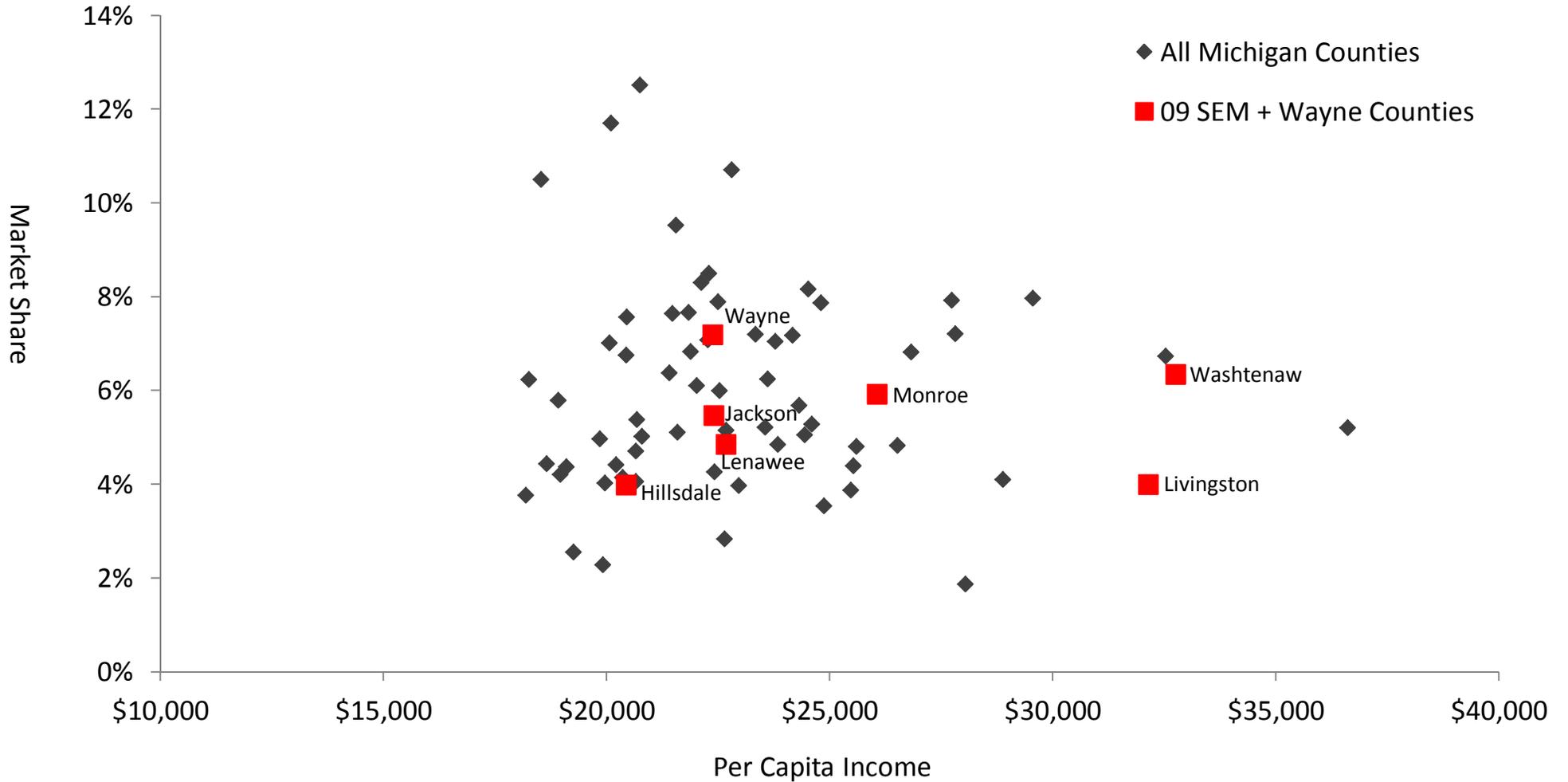


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Market share is a measure of sales (or revenues) as a share of aggregate income for each respective level of geography.

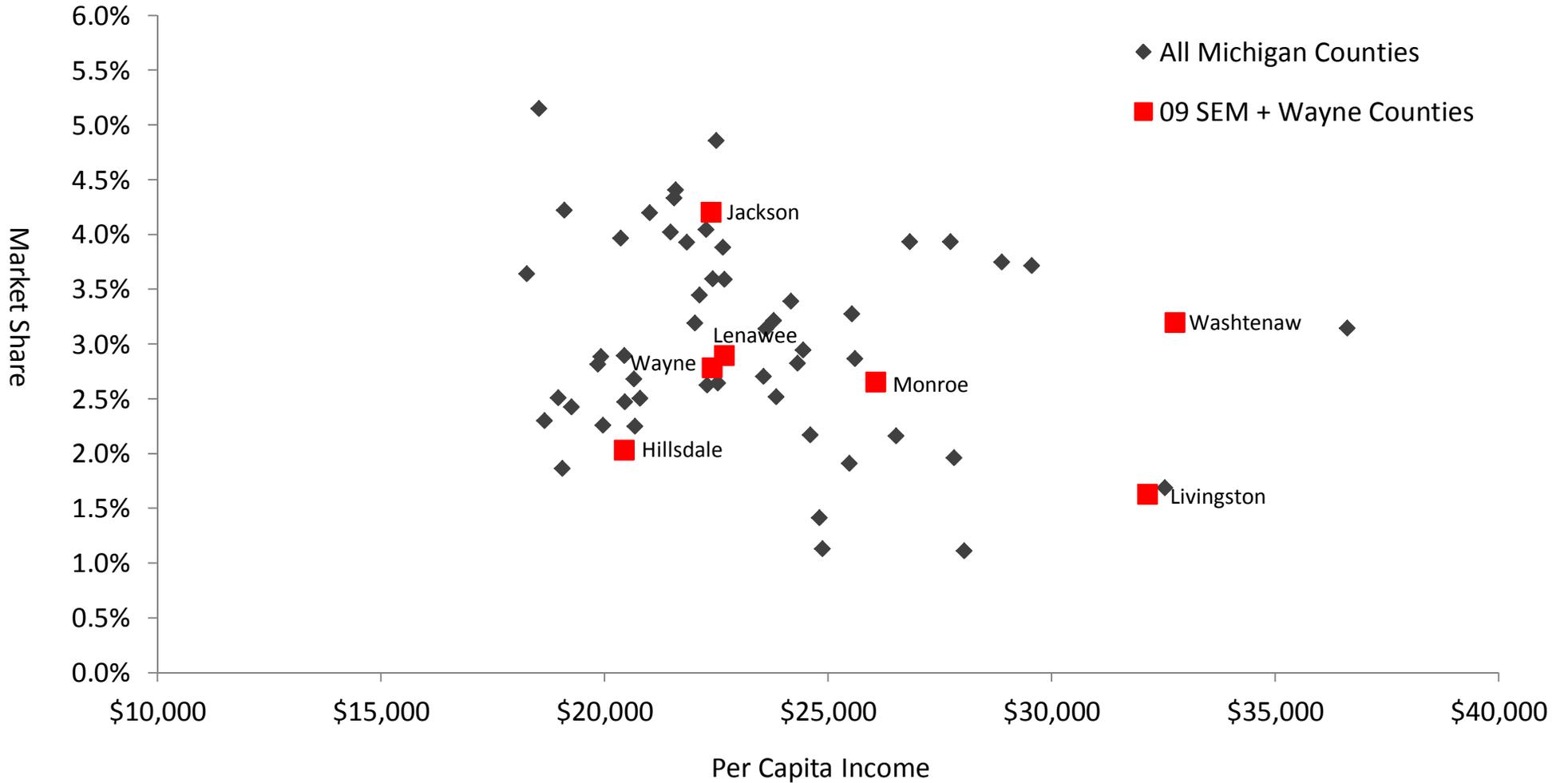
Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2014 (5-yr) American Community Survey.

Market Share v. Per Capita Income
 Food and Beverage Stores | NAICS 445
 Selected Counties in the State of Michigan



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Market Share v. Per Capita Income Health and Personal Care Stores | NAICS 446 Selected Counties in the State of Michigan

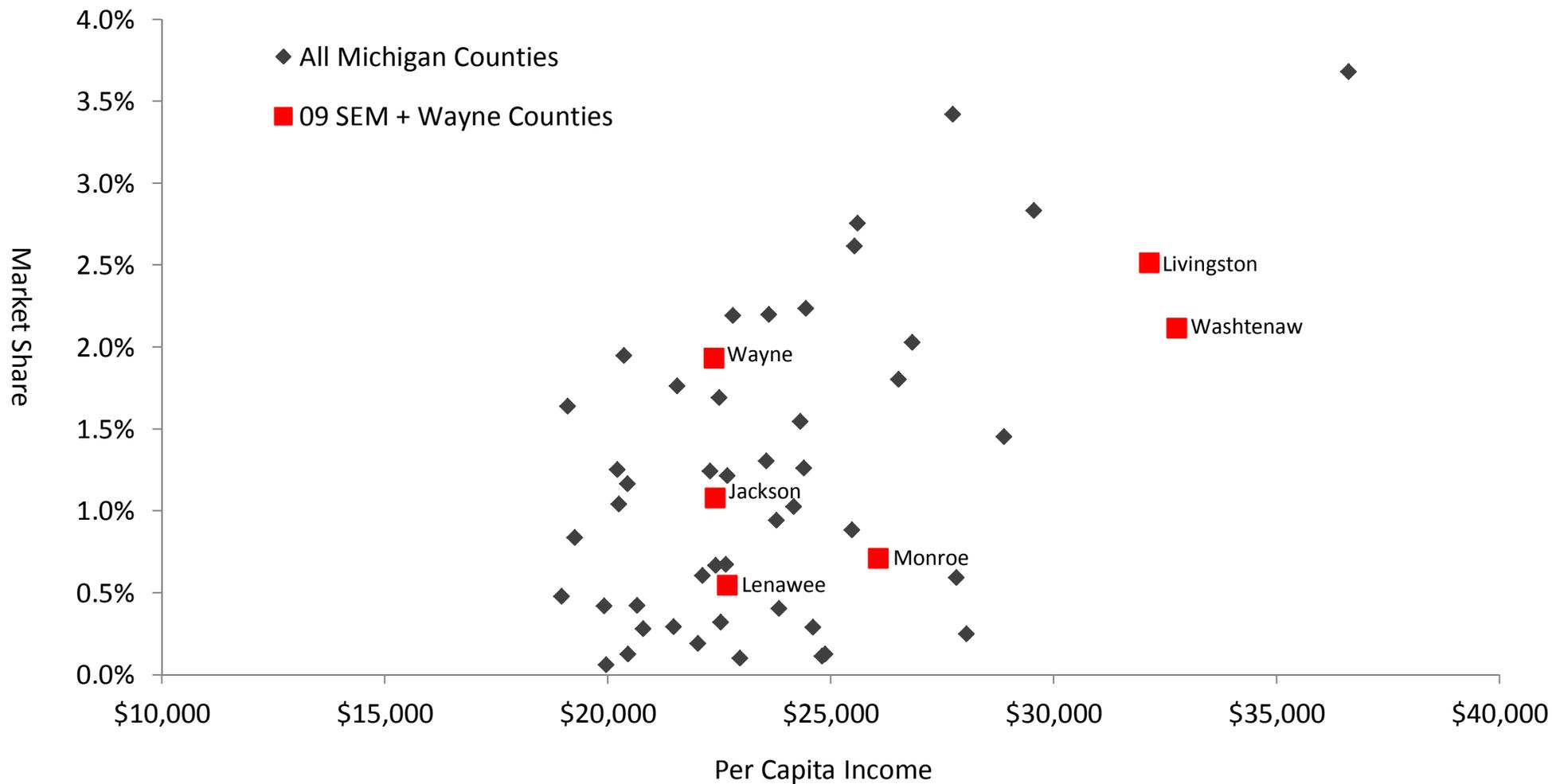


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Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2014 (5-yr) American Community Survey.

Market Share v. Per Capita Income Clothing, Accessories Stores | NAICS 448 Selected Counties in the State of Michigan

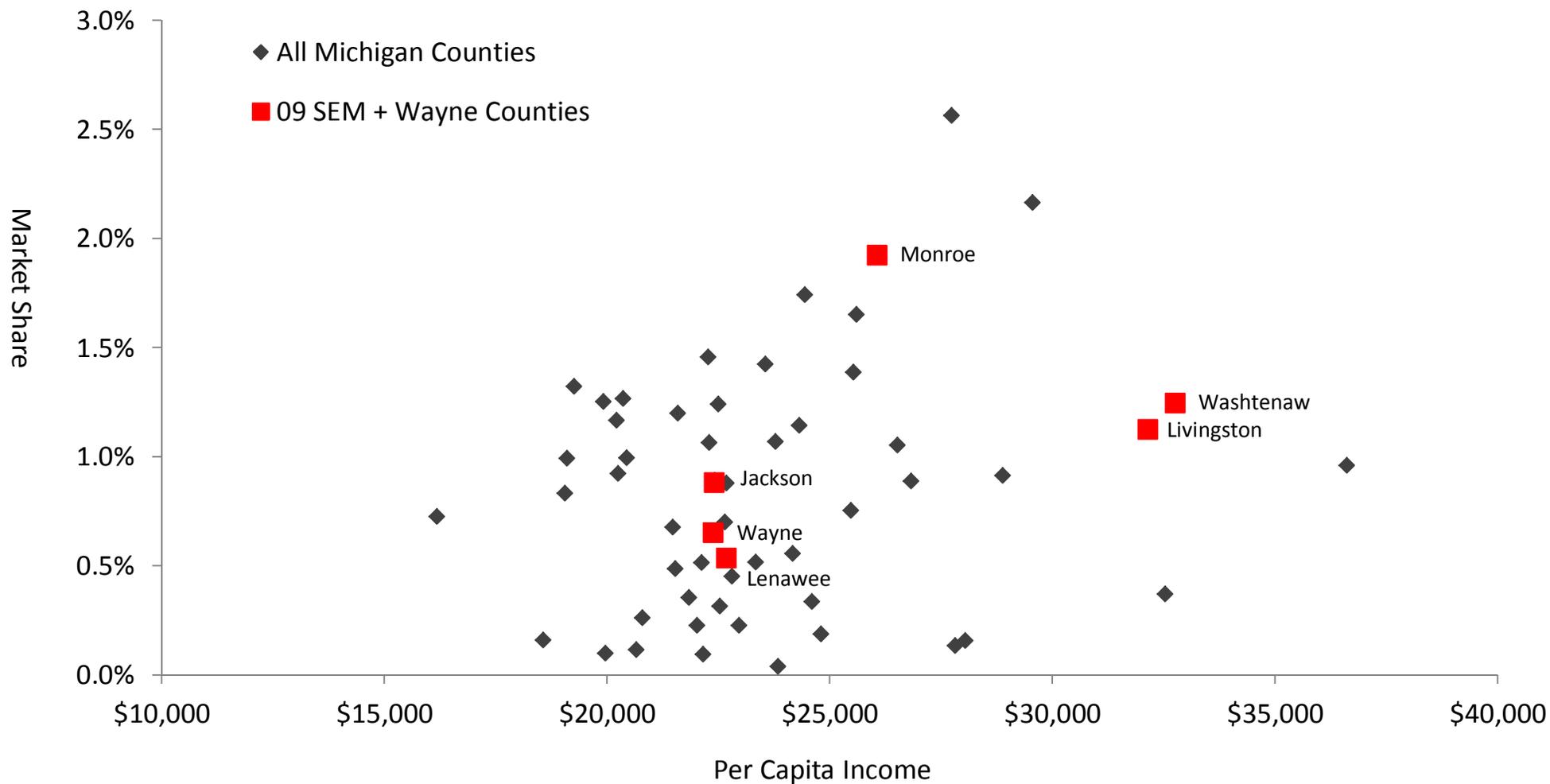


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Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2014 (5-yr) American Community Survey.

Market Share v. Per Capita Income Sporting Goods, Hobby, and Book Stores | NAICS 451 Selected Counties in the State of Michigan

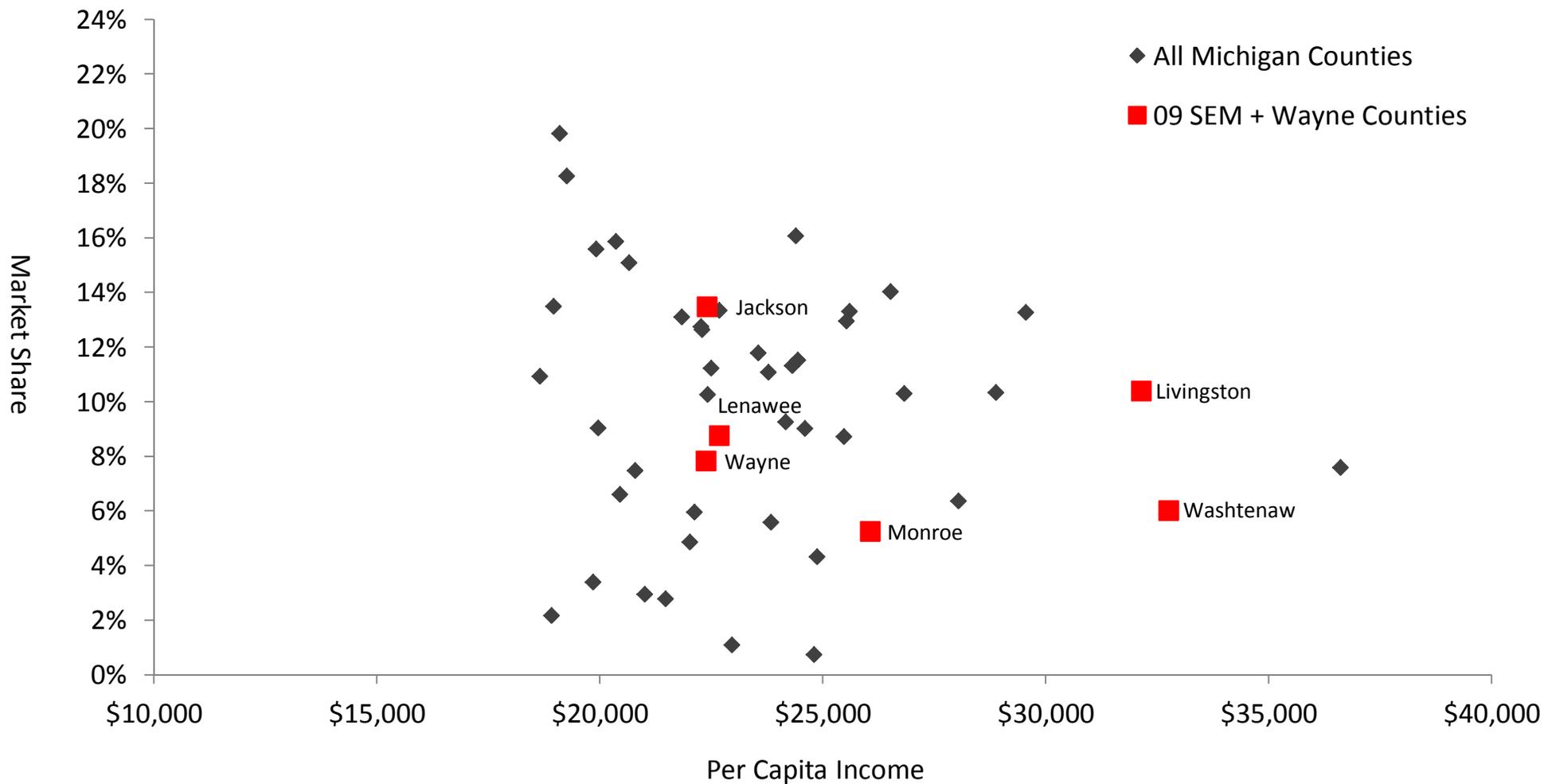


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Market Share v. Per Capita Income General Merchandise Stores | NAICS 452 Selected Counties in the State of Michigan

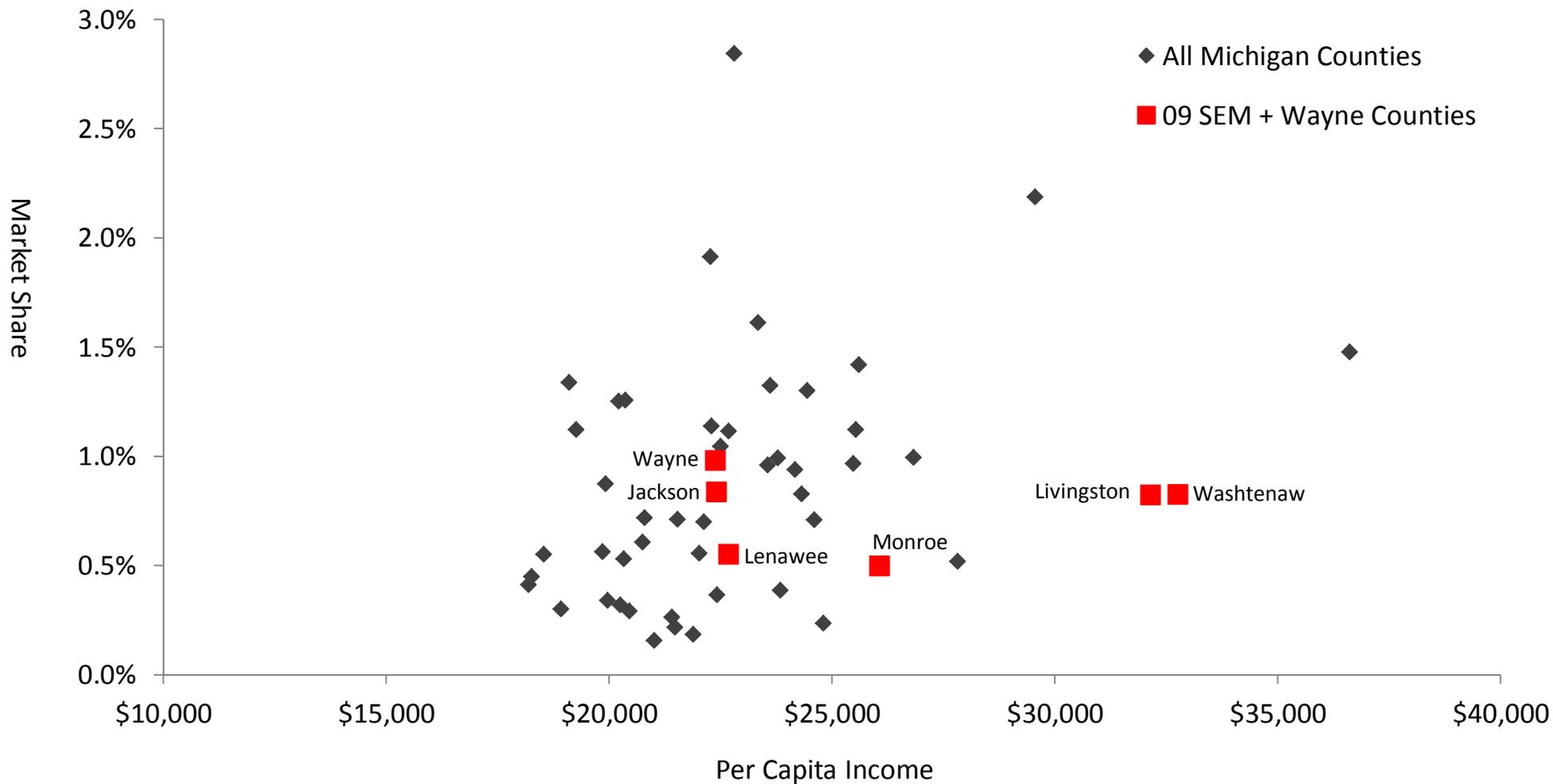


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Market Share v. Per Capita Income Miscellaneous Store Retailers | NAICS 453 Selected Counties in the State of Michigan

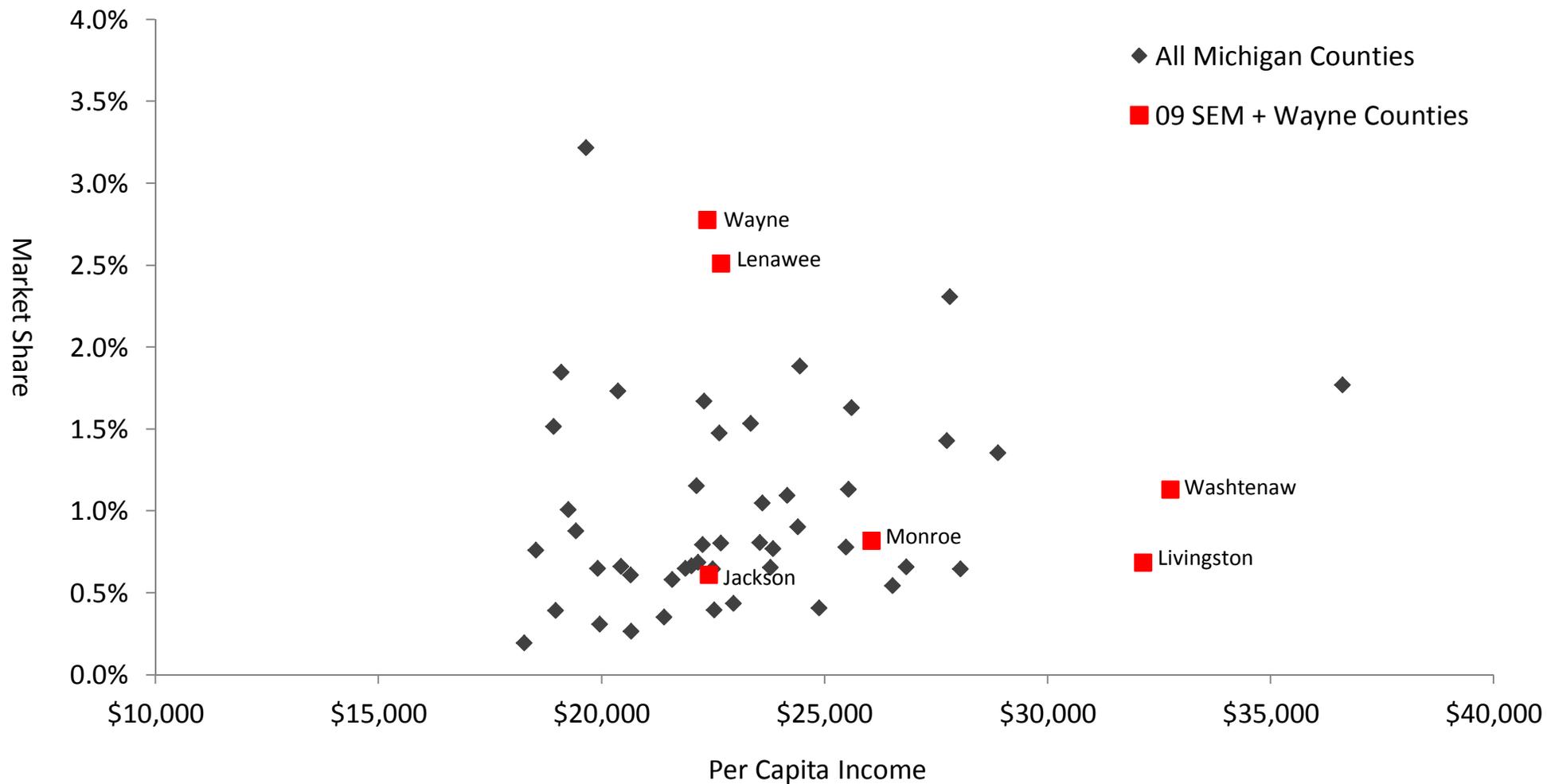


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Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2014 (5-yr) American Community Survey.

Market Share v. Per Capita Income Arts, Entertainment, and Recreation | NAICS 71 Selected Counties in the State of Michigan

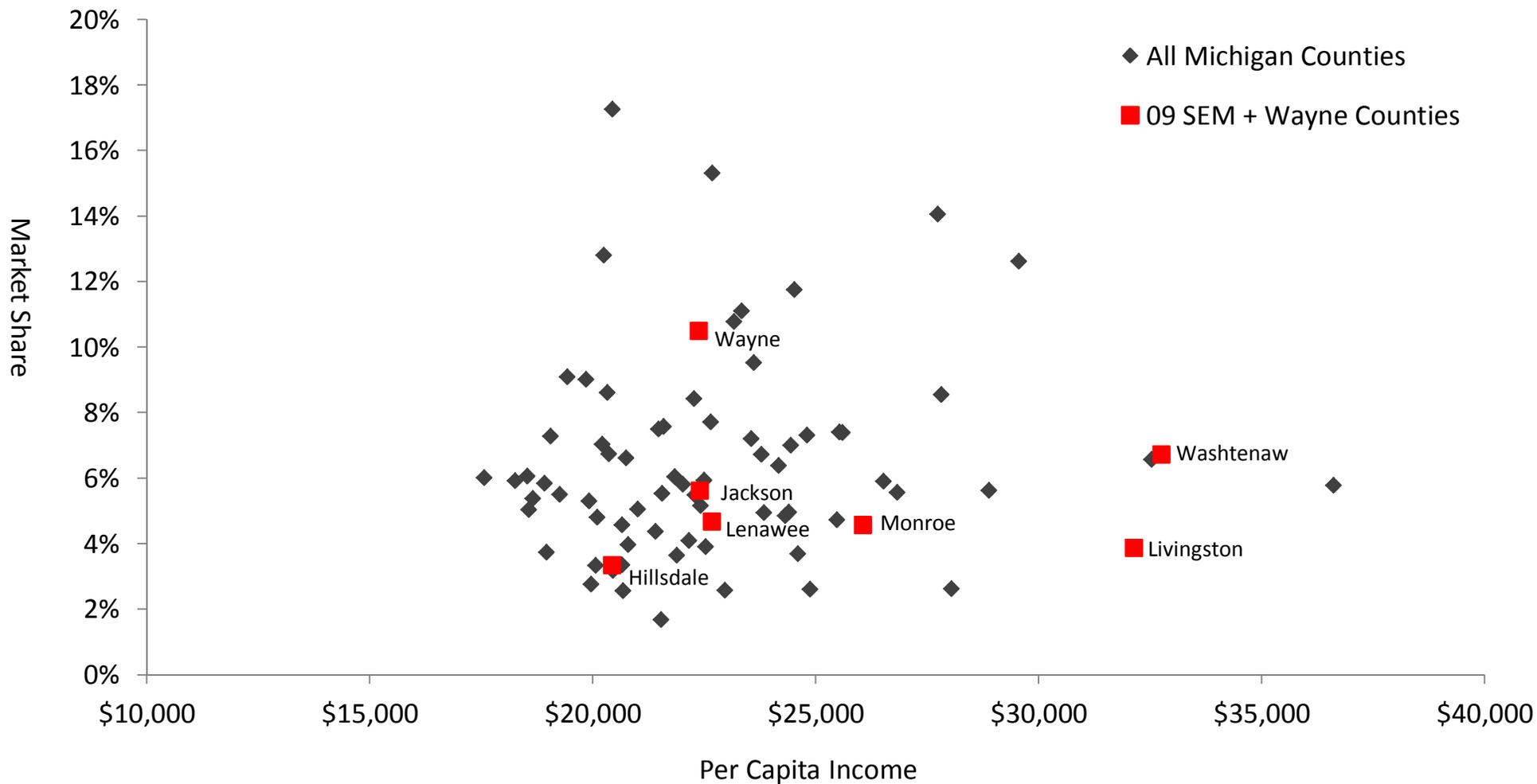


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Market Share v. Per Capita Income All Traveler Accommodations | NAICS 72 Selected Counties in the State of Michigan

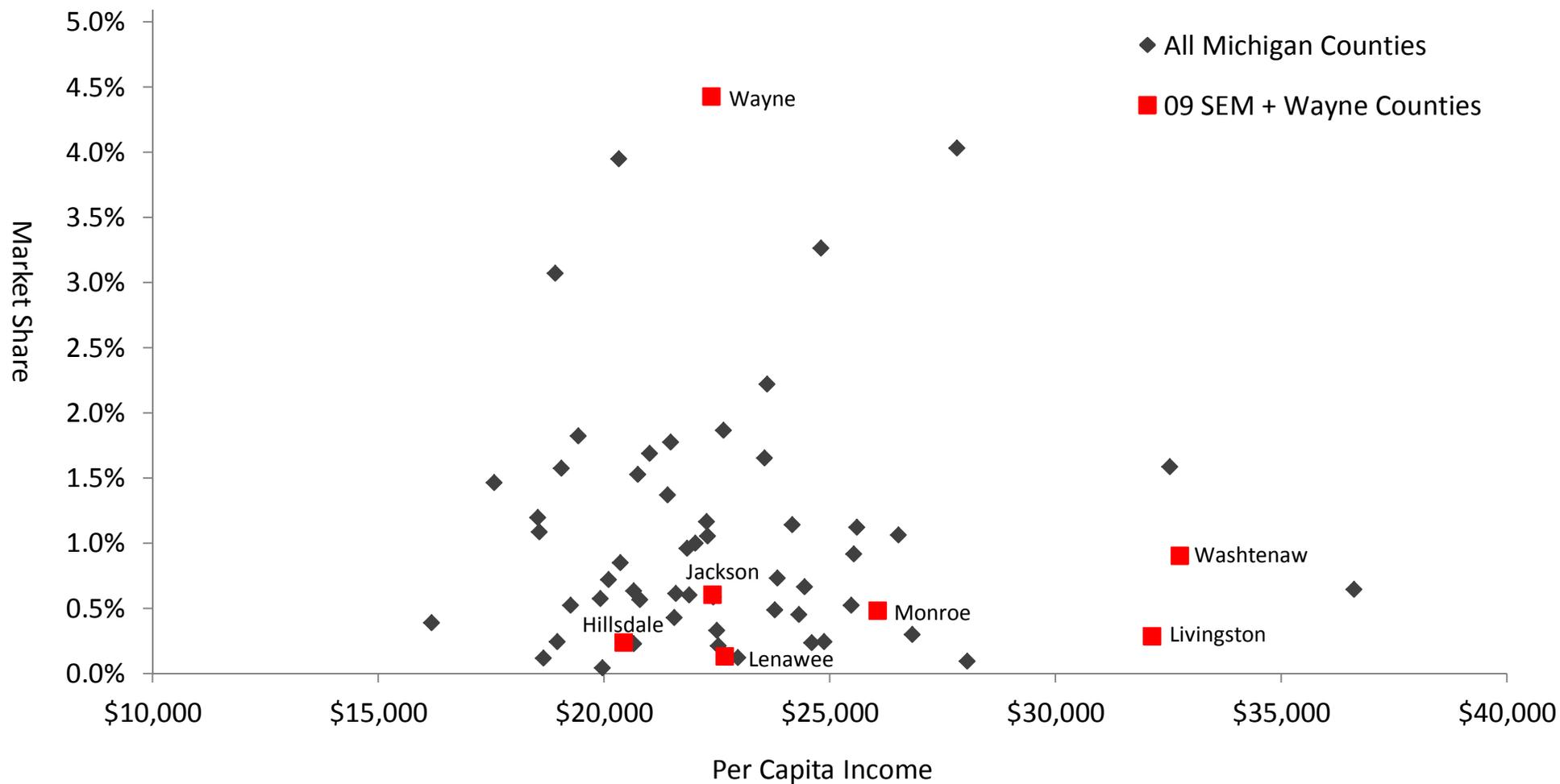


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Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2014 (5-yr) American Community Survey.

Market Share v. Per Capita Income Hotels and Motels, Lodging | NAICS 721 Selected Counties in the State of Michigan

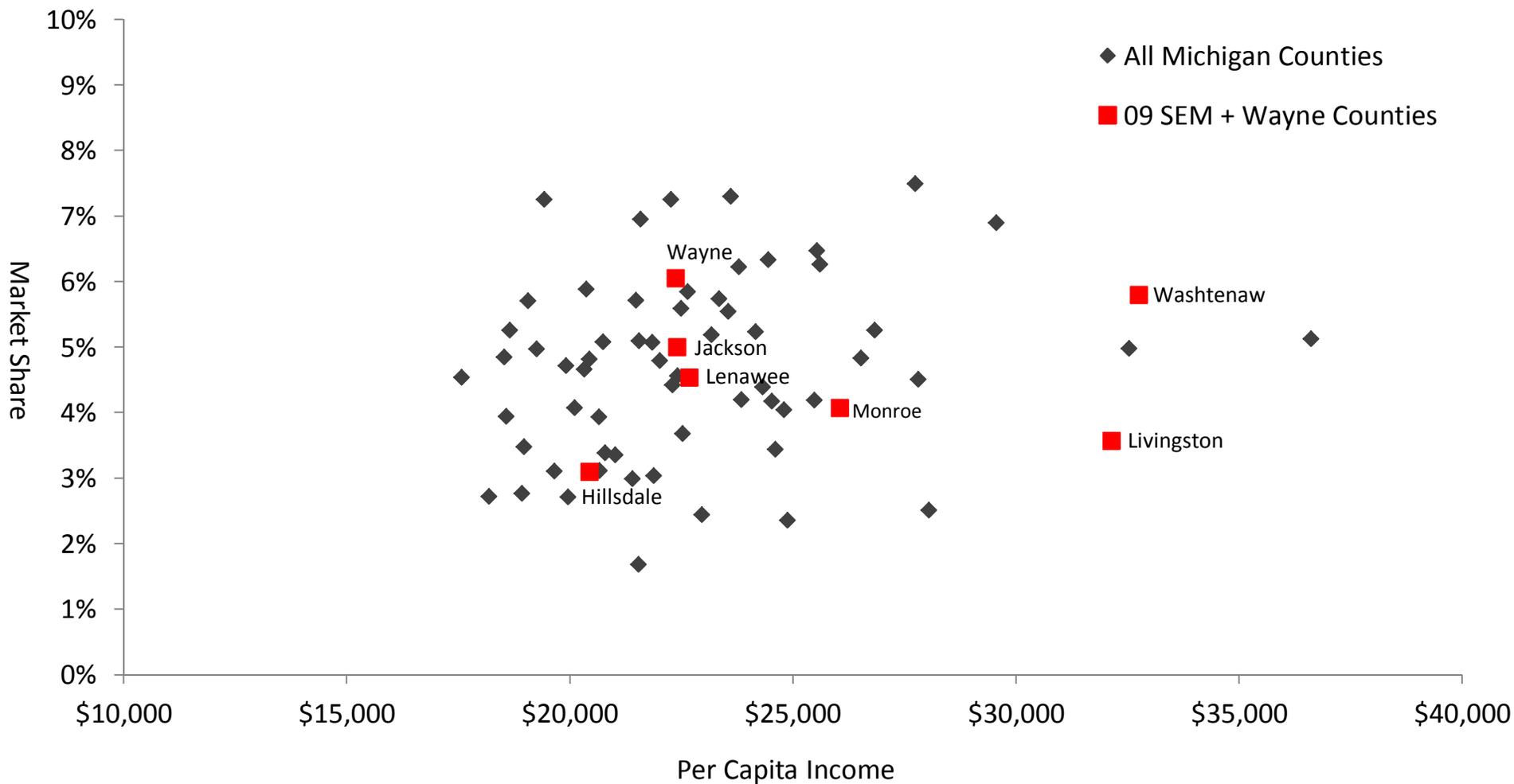


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Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2014 (5-yr) American Community Survey.

Market Share v. Per Capita Income Food Service, Restaurants, Drinking Places | NAICS 722 Selected Counties in the State of Michigan



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Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2014 (5-yr) American Community Survey.



Section I
Retail Market Share
The City of Monroe

Prepared by:



LandUseUSA



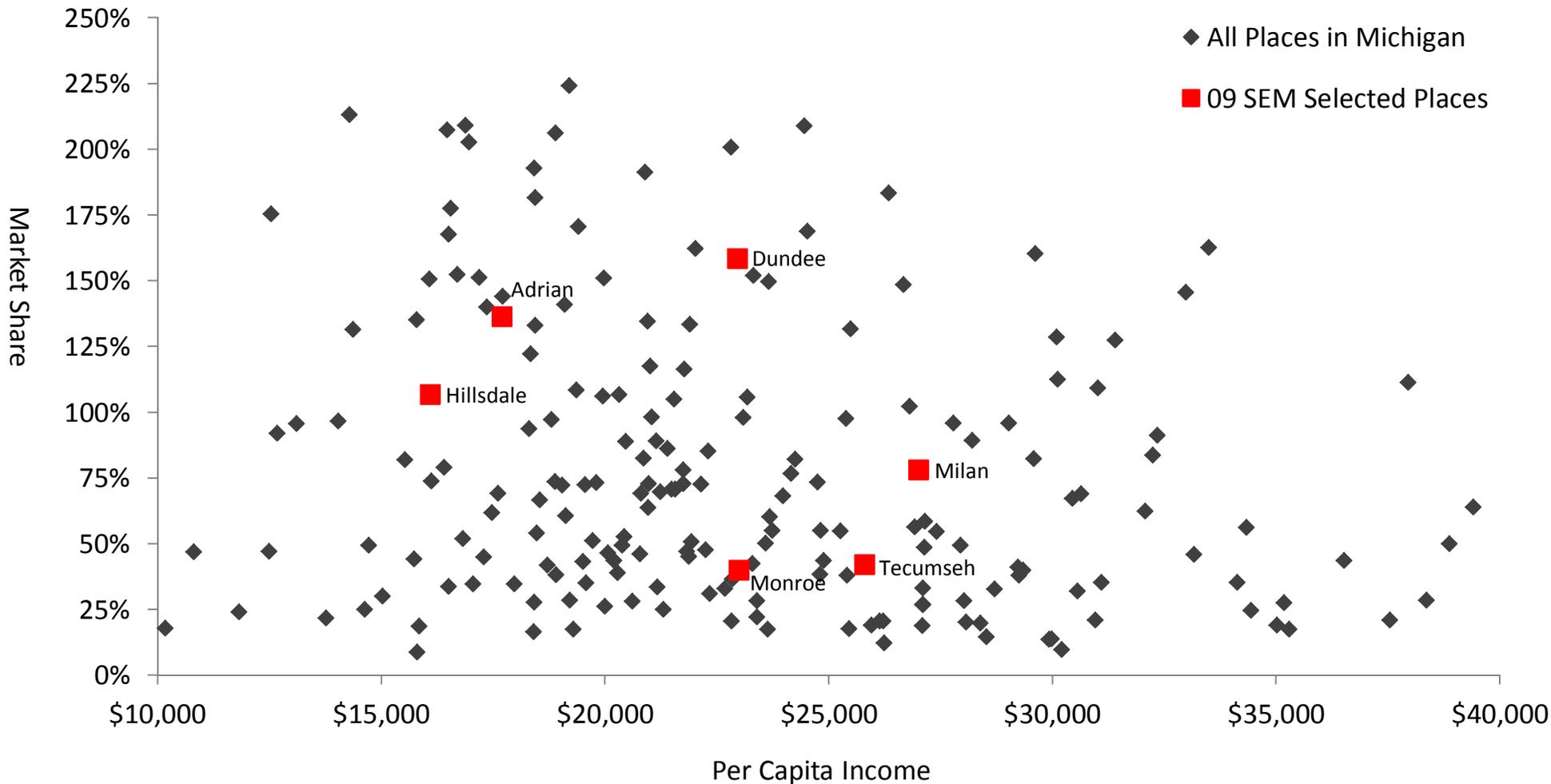
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Prepared for:



City of Monroe
Monroe, Michigan
Incorporated in 1837

Market Share v. Per Capita Income Retail Trade | NAICS 44-45 Selected Places (Cities, Villages) in the State of Michigan

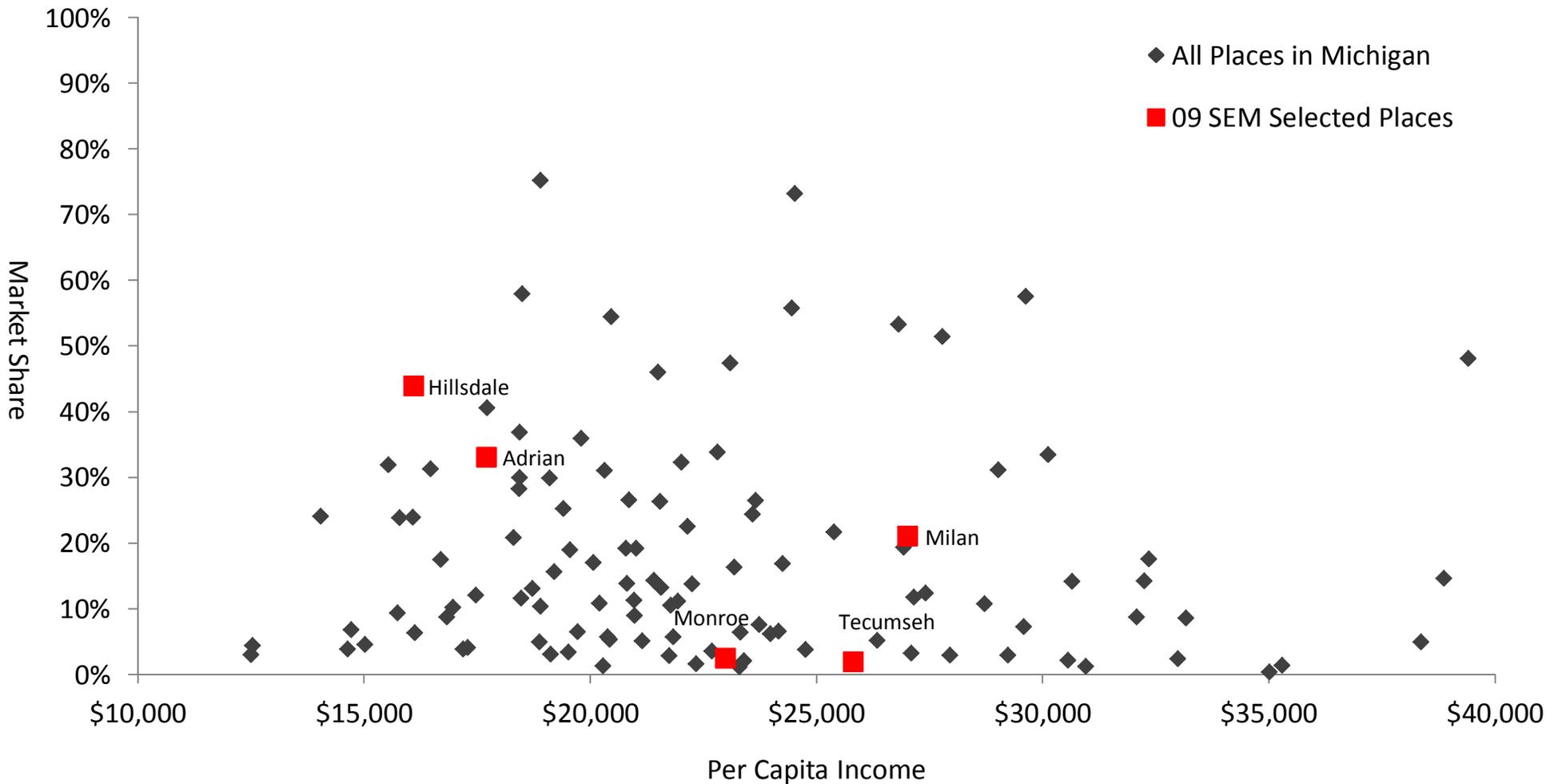


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Market Share v. Per Capita Income Motor Vehicle and Parts Dealers | NAICS 441 Selected Places (Cities, Villages) in the State of Michigan



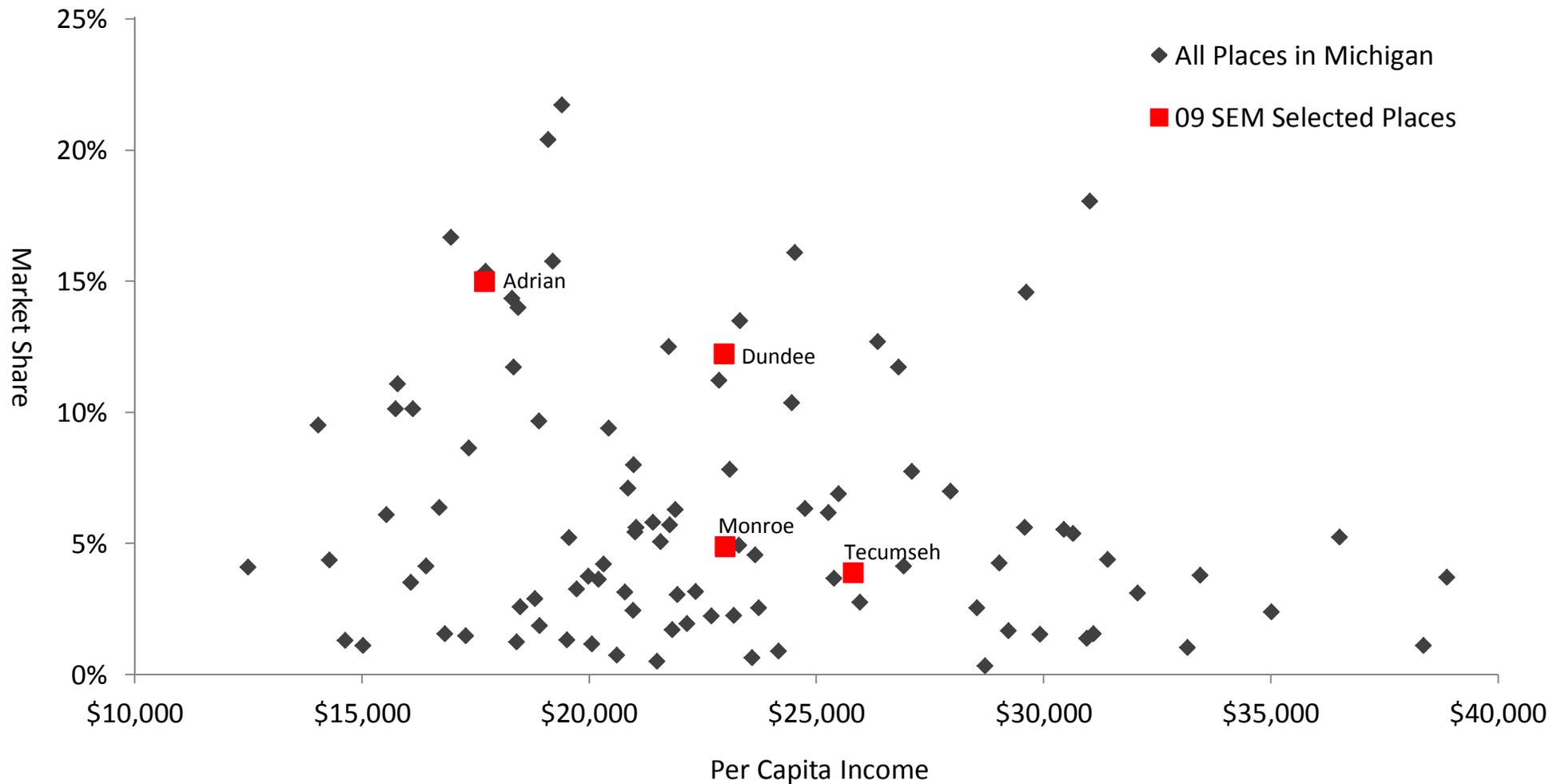
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Market Share v. Per Capita Income

Building and Garden Materials, Supplies | NAICS 444
Selected Places (Cities, Villages) in the State of Michigan

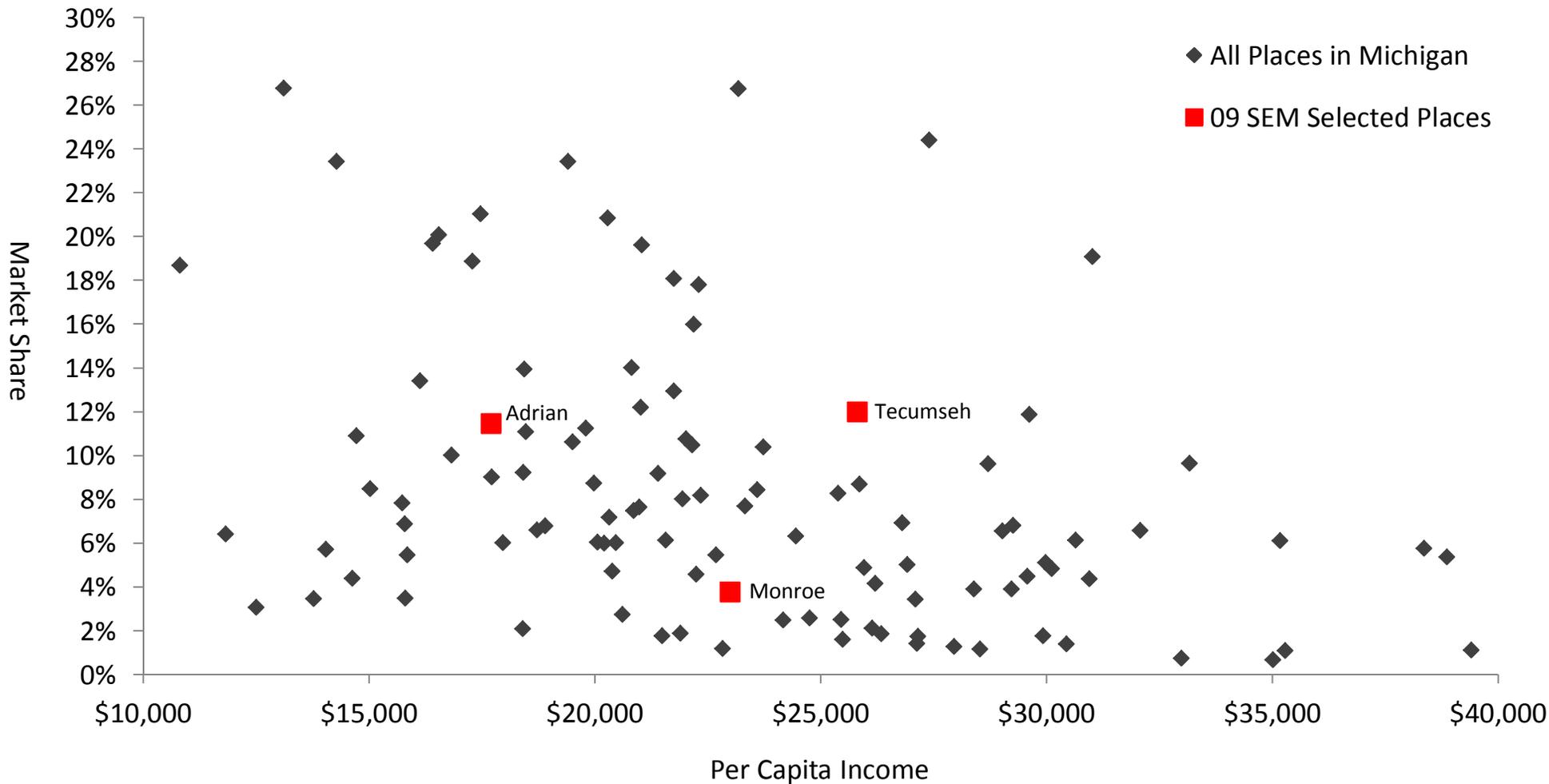


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Market Share v. Per Capita Income Food and Beverage Stores | NAICS 445 Selected Places (Cities, Villages) in the State of Michigan

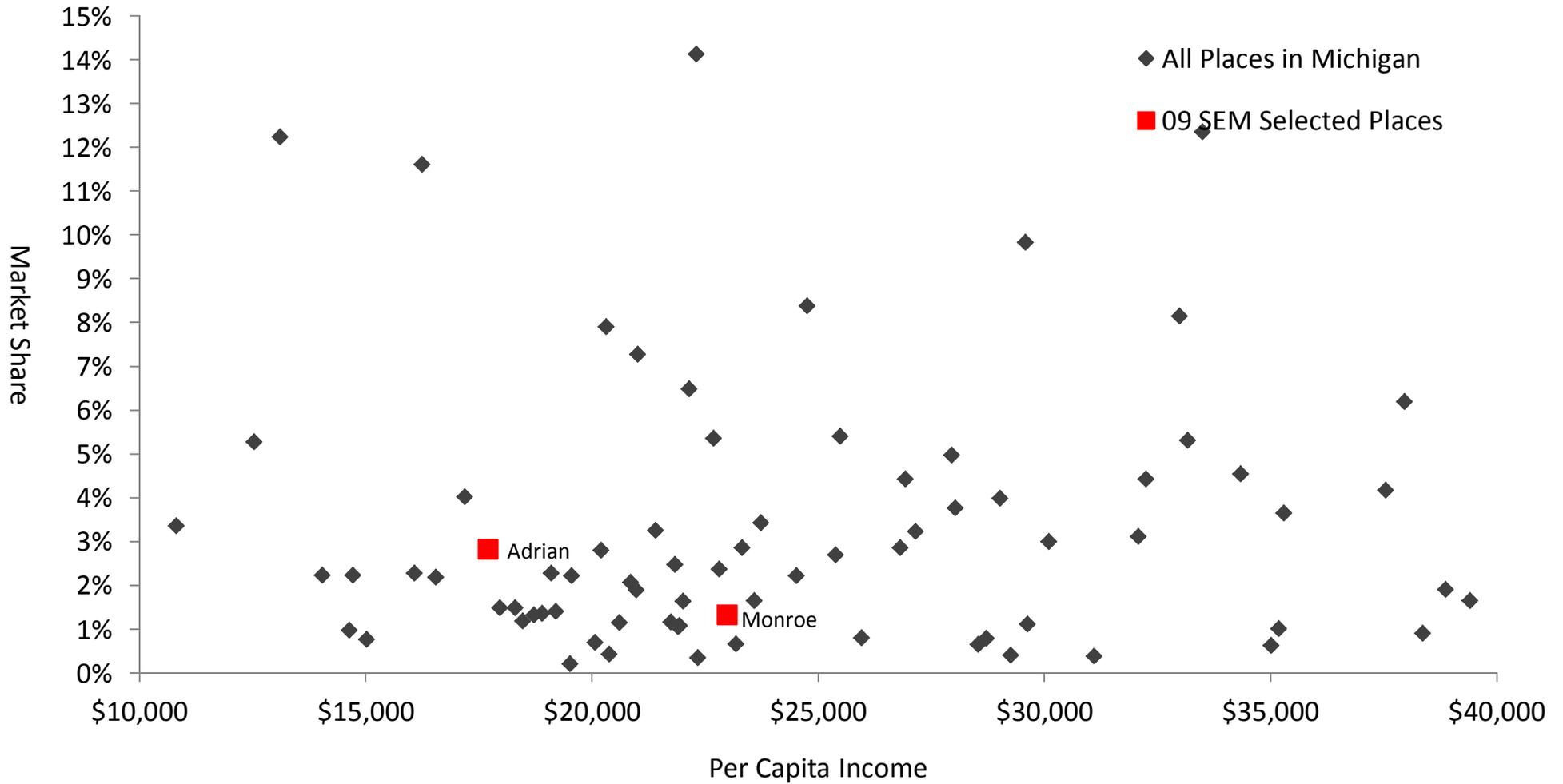


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Market Share v. Per Capita Income
 Clothing, Accessories Stores | NAICS 448
 Selected Places (Cities, Villages) in the State of Michigan

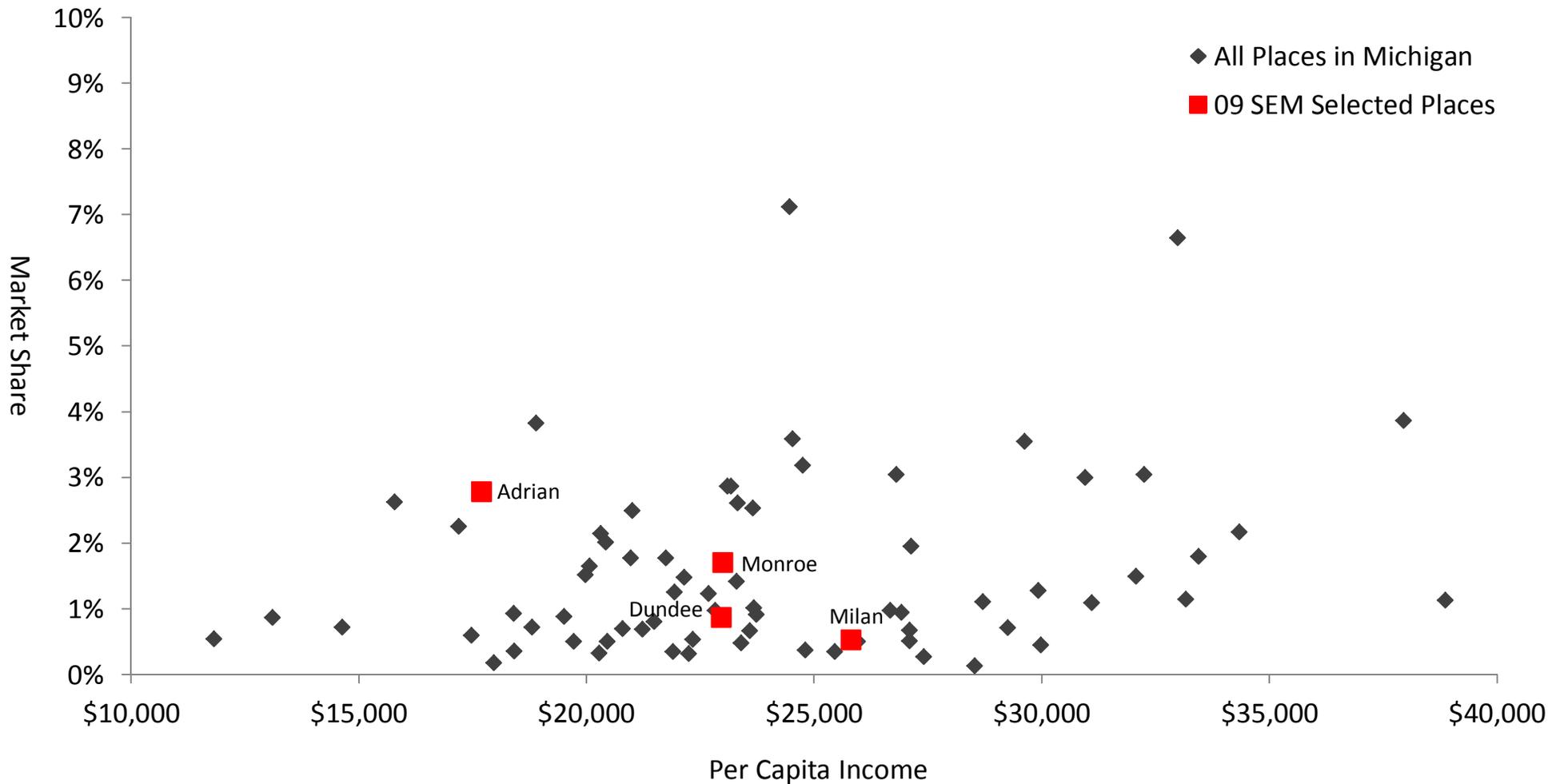


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Market Share v. Per Capita Income Miscellaneous Store Retailers | NAICS 453 Selected Places (Cities, Villages) in the State of Michigan

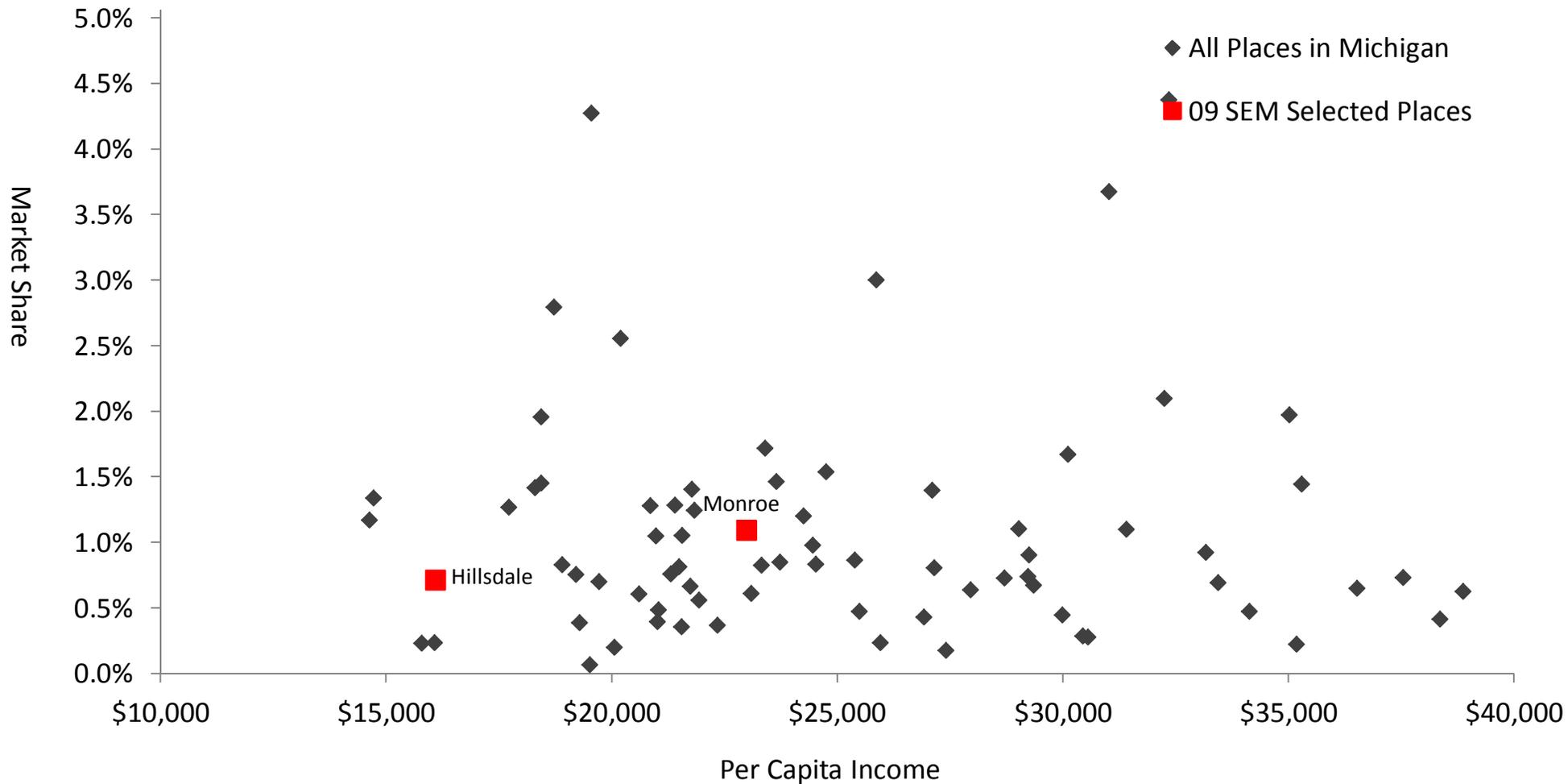


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Market Share v. Per Capita Income Arts, Entertainment, and Recreation | NAICS 71 Selected Places (Cities, Villages) in the State of Michigan

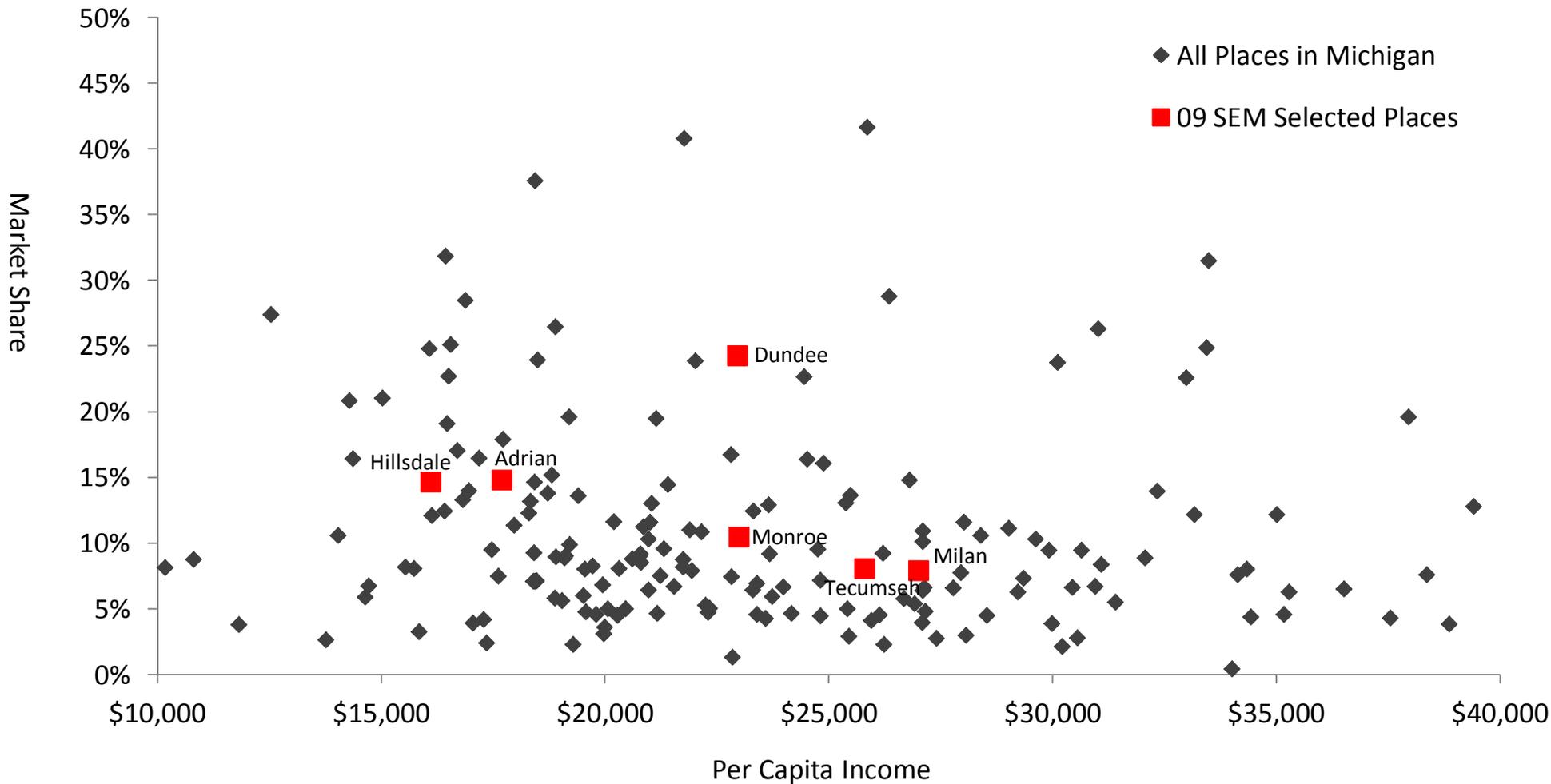


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Market Share v. Per Capita Income All Traveler Accommodations | NAICS 72 Selected Places (Cities, Villages) in the State of Michigan

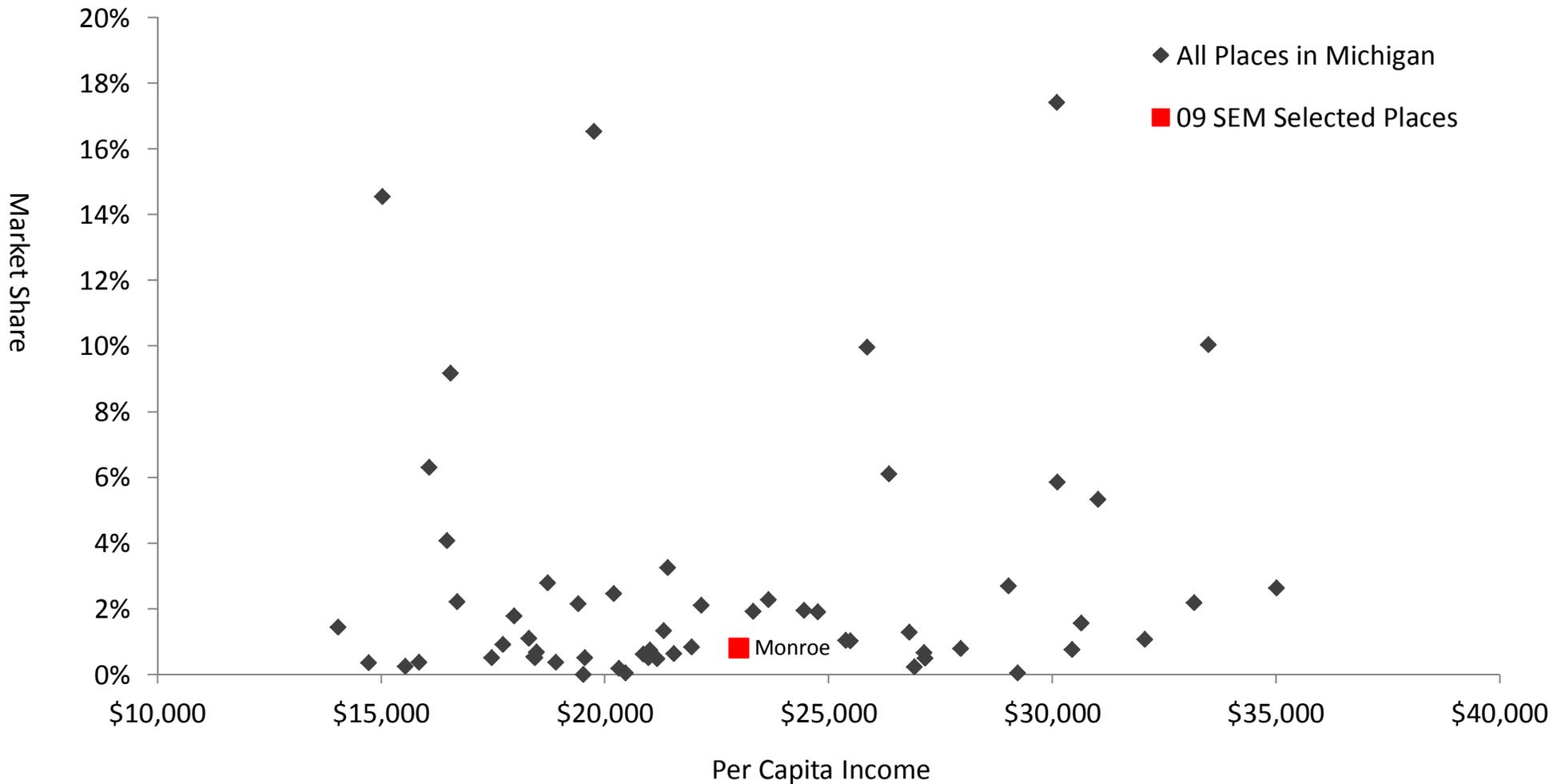


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Market Share v. Per Capita Income Hotels and Motels, Lodging | NAICS 721 Selected Places (Cities, Villages) in the State of Michigan

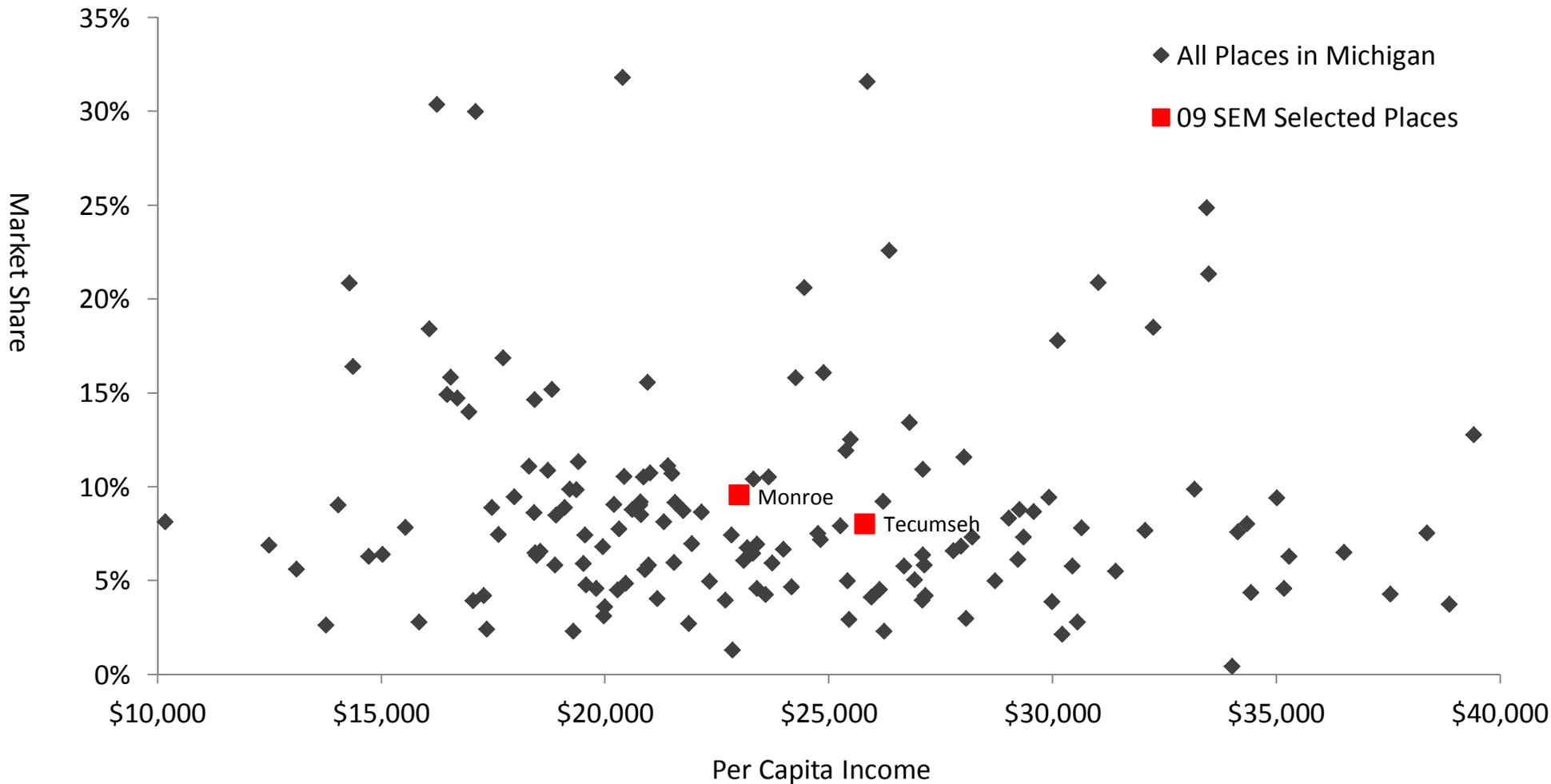


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Market Share v. Per Capita Income Restaurants, Drinking Establishments | NAICS 722 Selected Places (Cities, Villages) in the State of Michigan



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Underlying data from the 2012 U.S. Economic Census; 2010 Decennial Census; and 2014 (5-yr) American Community Survey.



**Maps and Demographics
The City of Monroe
TMA Supplement
2017**

Prepared by:



LandUseUSA



seamless collaborative
urbanism + design + economics

Prepared for:



City of Monroe
Monroe, Michigan
Incorporated in 1837



Prepared by:



Maps and Population

SEM Region 9 AA

Monroe County BB

The City of Monroe CC

Half Mile Radius DD



Section **AA**
Maps and Population
SEM Prosperity Region 9

Prepared by:



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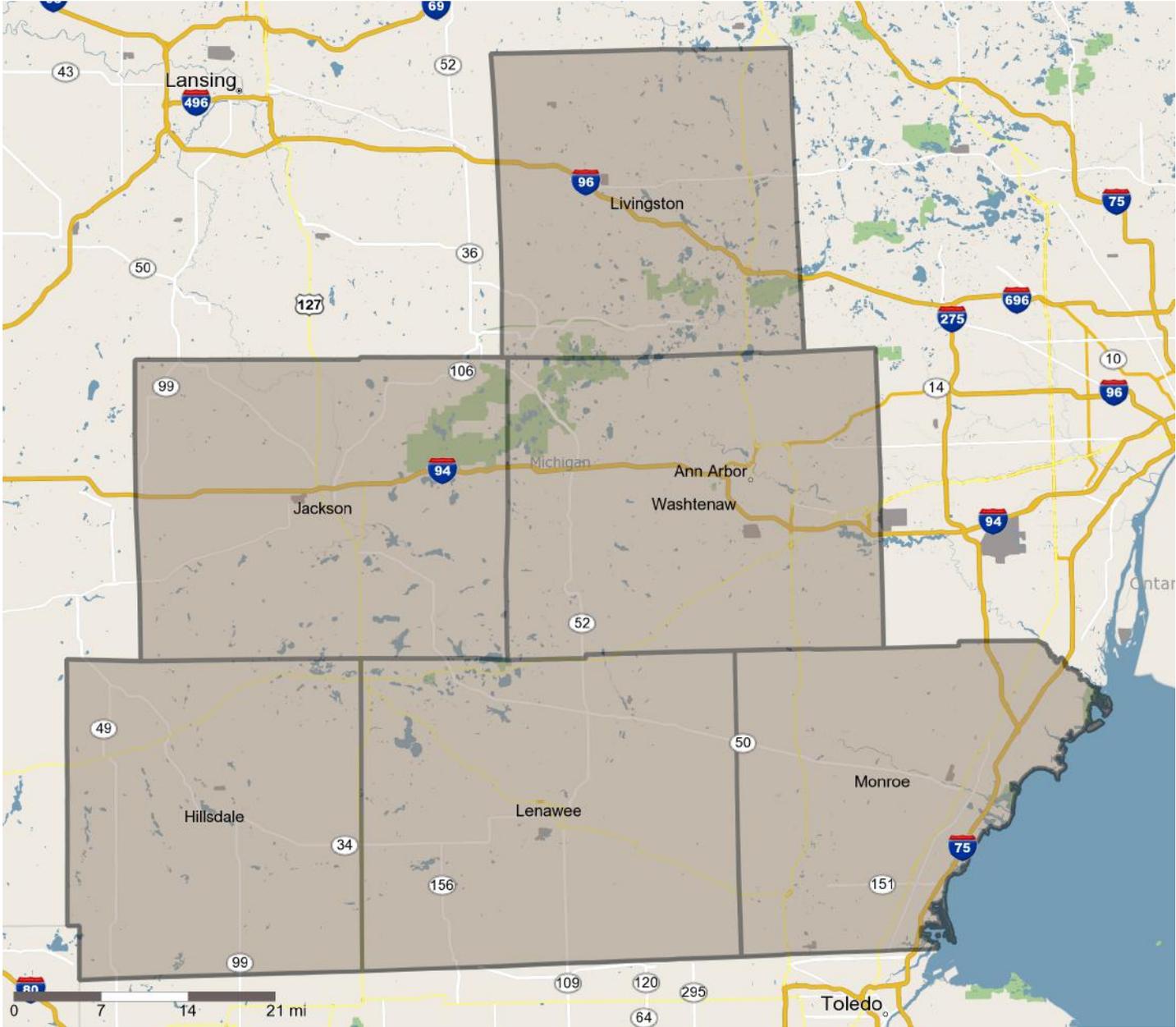
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City of Monroe
Monroe, Michigan
Incorporated in 1837

Geographic Setting with Highway Linkages Monroe County | SEM Prosperity Region 9



Source: Underlying map provided by Alteryx Decision Analytics;
exhibit prepared by LandUseUSA (c) 2016.

Market Parameters and Forecasts | Population
 The City of Monroe | Monroe Co. | SEM Prosperity Region 9

| | 2010 Census | 2010 ACS 5-yr | 2011 ACS 5-yr | 2012 ACS 5-yr | 2013 ACS 5-yr | 2014 ACS 5-yr | 2015 ACS 5-yr | 2016 Estimate | 2017 Forecast | 2020 Forecast | 2015 ACS 5-yr |
|-------------------------|-----------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|----------------------|
| Place or County | Pop- ulation | Pop- ulation | Pop- ulation | Pop- ulation | Pop- ulation | Pop- ulation | Pop- ulation | Pop- ulation | Pop- ulation | Pop- ulation | Persons per Hhld. |
| North to South | | | | | | | | | | | |
| 1 Frenchtown Twp. | 20,428 | 20,775 | 20,643 | 20,472 | 20,352 | 20,215 | 20,134 | 20,134 | 20,134 | 20,134 | 2.6 |
| 2 City of Monroe | 20,733 | 21,180 | 20,977 | 20,810 | 20,627 | 20,455 | 20,335 | 20,335 | 20,335 | 20,335 | 2.5 |
| 3 Monroe Twp. | 14,568 | 14,561 | 14,560 | 14,507 | 14,500 | 14,448 | 14,387 | 14,386 | 14,385 | 14,382 | 2.5 |
| SEM Prosperity Region 9 | | | | | | | | | | | |
| 1 Livingston County | 180,967 | 181,350 | 181,362 | 181,678 | 182,402 | 183,264 | 184,591 | 185,928 | 187,274 | 191,372 | 2.7 |
| 2 Jackson County | 160,248 | 161,569 | 160,834 | 160,257 | 160,126 | 159,927 | 159,759 | 159,759 | 159,759 | 159,759 | 2.6 |
| 3 Washtenaw County | 344,791 | 343,947 | 344,727 | 346,010 | 348,560 | 351,454 | 354,092 | 357,032 | 359,996 | 369,038 | 2.6 |
| 4 Hillsdale County | 46,688 | 47,033 | 46,832 | 46,617 | 46,463 | 46,282 | 46,178 | 46,178 | 46,178 | 46,178 | 2.6 |
| 5 Lenawee County | 99,892 | 100,911 | 100,456 | 99,878 | 99,505 | 99,257 | 98,902 | 98,902 | 98,902 | 98,902 | 2.6 |
| 6 Monroe County | 152,021 | 152,784 | 152,410 | 151,944 | 151,408 | 150,851 | 150,436 | 150,436 | 150,436 | 150,436 | 2.6 |

Source: Underlying data provided by the U.S. Decennial Census for 2010, and the American Community Survey for 2010 - 2015 (5-year estimates). Analysis, interpolations, and forecasts by LandUse|USA; 2017 ©.

Annual Average Daily Traffic Counts | Predominant Highways
Hillsdale and Monroe Cos. | SEM Prosperity Region 9 | 2015

| Place Name | Local Highway | Local Street | Primary Direction | Annual Avg. Daily Traffic |
|--------------------|---------------|--------------|-------------------|---------------------------|
| Hillsdale County | | | | |
| City of Litchfield | Hwy 49 | Anderson Rd | N - S | 4,100 |
| City of Litchfield | Hwy 99 | Homer Rd | NW - SE | 3,100 |
| City of Jonesville | Hwy 99 | Olds St | N - S | 12,900 |
| City of Jonesville | Hwy 12 | Chicago Rd | SW - NE | 10,700 |
| City of Hillsdale | Hwy 99 | Carleton Rd | N - S | 14,800 |
| Monroe County | | | | |
| City of Dundee | Hwy 23 | . | N - S | 38,400 |
| City of Dundee | Hwy 50 | Tecumseh St | E - W | 15,600 |
| City of Monroe | I-75 | . | N - S | 66,100 |
| City of Monroe | Hwy 24 | Telegraph Rd | N - S | 25,400 |
| City of Monroe | Hwy 125 | Monroe St | N - S | 24,700 |
| City of Monroe | Hwy 50 | Front St | E - W | 16,600 |

Underlying data provided by the Michigan Department of Transportation, 2015.
Analysis and exhibit prepared by LandUseUSA, January 2016.

Annual Average Daily Traffic Counts | Predominant Highways
 Lenawee County | SEM Prosperity Region 9 | 2015

| Place Name | Local Highway | Local Street | Primary Direction | Annual Avg. Daily Traffic |
|-------------------------|---------------|--------------|-------------------|---------------------------|
| Lenawee Co. \| Northwest | | | | |
| Woodstock Township | Hwy 127 | Steer St | NW - SE | 12,400 |
| Woodstock Township | Hwy 12 | Michigan Ave | E - W | 4,600 |
| Rollin Township | Hwy 127 | Meridian Rd | N - S | 5,100 |
| Cambridge Township | Hwy 12 | Michigan Ave | E - W | 6,100 |
| Cambridge Township | Hwy 50 | Monroe Rd | NW - SE | 5,800 |
| Lenawee Co. \| Northeast | | | | |
| Village of Clinton | Hwy 12 | Michigan Ave | E - W | 12,000 |
| City of Tecumseh | Hwy 50 | Monroe Rd | E - W | 14,800 |
| Raisin Charter Twp. | Hwy 52 | Adrian Hwy | N - S | 9,600 |
| Lenawee Co. \| Central | | | | |
| Adrian Charter Twp. | Hwy 52 | Adrian Hwy | N - S | 9,600 |
| Adrian Charter Twp. | Hwy 223 | Maumee St | E - W | 9,600 |
| City of Adrian | Hwy 223 | Cadmus Rd | E - W | 20,900 |
| City of Adrian | Hwy 52 | Adrian Hwy | N - S | 18,300 |
| City of Adrian | Hwy 34 | Beecher Rd | E - W | 12,400 |
| Charter Twp. Madison | Hwy 34 | Beecher Rd | E - W | 5,100 |
| Charter Twp. Madison | Hwy 223 | Cadmus Rd | E - W | 20,900 |
| Charter Twp. Madison | Hwy 52 | Adrian Hwy | N - S | 3,600 |
| Lenawee Co. \| South | | | | |
| City of Hudson | Hwy 34 | Main St | E - W | 6,200 |
| City of Hudson | Hwy 127 | Meridian Rd | N - S | 5,100 |
| City of Morenci | Hwy 156 | Main St | N - S | 3,900 |
| Village of Blissfield | Hwy 223 | Adrian St | NW - SE | 14,000 |

Underlying data provided by the Michigan Department of Transportation, 2015.
 Analysis and exhibit prepared by LandUseUSA, January 2016.

Demographic Profiles | Population by Age Bracket
 Southeast Michigan Prosperity Region 9 | 2000 - 2016

| Region or County | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
|-------------------|---------------|-------------|---------------|-------------|---------------|-------------|---------|---------|
| Place Name | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
| | Region | Region | Region | Region | Region | Region | Region | Region |
| | 2000 | 2000 | 2010 | 2010 | 2016 | 2016 | 2000-10 | 2010-16 |
| | Census | Share | Census | Share | Estimates | Share | C.A.R. | C.A.R. |
| Population Ages | | | | | | | | |
| 0 to 4 | 60,596 | 6.5% | 55,719 | 5.7% | 53,267 | 5.3% | -0.8% | -0.7% |
| 5 to 14 | 134,315 | 14.4% | 128,650 | 13.1% | 122,125 | 12.2% | -0.4% | -0.9% |
| 15 to 19 | 71,144 | 7.7% | 77,881 | 7.9% | 75,317 | 7.5% | 0.9% | -0.6% |
| 20 to 24 | 71,221 | 7.7% | 76,688 | 7.8% | 87,178 | 8.7% | 0.7% | 2.2% |
| 25 to 34 | 131,867 | 14.2% | 117,653 | 11.9% | 120,934 | 12.1% | -1.1% | 0.5% |
| 35 to 44 | 155,752 | 16.8% | 129,659 | 13.2% | 120,303 | 12.0% | -1.8% | -1.2% |
| 45 to 54 | 132,557 | 14.3% | 152,510 | 15.5% | 144,181 | 14.4% | 1.4% | -0.9% |
| 55 to 64 | 77,750 | 8.4% | 124,250 | 12.6% | 136,116 | 13.6% | 4.8% | 1.5% |
| 65 to 74 | 51,043 | 5.5% | 67,550 | 6.9% | 85,293 | 8.5% | 2.8% | 4.0% |
| 75 to 84 | 31,952 | 3.4% | 38,002 | 3.9% | 40,371 | 4.0% | 1.7% | 1.0% |
| 85+ | <u>11,425</u> | <u>1.2%</u> | <u>16,038</u> | <u>1.6%</u> | <u>18,395</u> | <u>1.8%</u> | 3.4% | 2.3% |
| Sum | 929,622 | 100.0% | 984,600 | 100.0% | 1,003,481 | 100.0% | 0.6% | 0.3% |
| Total Population | 929,622 | 100.0% | 984,600 | 100.0% | 1,003,481 | 100.0% | 0.6% | 0.3% |
| Median Age | 35 | . | 38 | . | 39 | . | . | . |
| Per Capita Income | \$23,768 | . | \$28,793 | . | \$30,922 | . | 1.9% | 1.2% |

Data provided by Experian, powered by Alteryx © 2016. Analysis and exhibit prepared by LandUseUSA © 2017.
 C.A.R. indicates compound annual rate.

Demographic Profiles | Race and Ethnicity
 Southeast Michigan Prosperity Region 9 | 2000 - 2016

| Region or County | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
|------------------------------|---------|--------|---------|--------|-----------|--------|---------|---------|
| Place Name | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
| | Region | Region | Region | Region | Region | Region | Region | Region |
| | 2000 | 2000 | 2010 | 2010 | 2016 | 2016 | 2000-10 | 2010-16 |
| | Census | Share | Census | Share | Estimates | Share | C.A.R. | C.A.R. |
| Population by Race | | | | | | | | |
| White, Caucasian | 818,947 | 88.1% | 853,350 | 86.7% | 860,234 | 85.7% | 0.4% | 0.1% |
| Black, African Amer. | 56,426 | 6.1% | 63,311 | 6.4% | 66,287 | 6.6% | 1.2% | 0.8% |
| Amer. Indian, Aleut | 3,552 | 0.4% | 3,589 | 0.4% | 3,873 | 0.4% | 0.1% | 1.3% |
| Asian, Pacific Island. | 23,691 | 2.5% | 31,512 | 3.2% | 36,048 | 3.6% | 2.9% | 2.3% |
| Any Other Race | 8,972 | 1.0% | 9,494 | 1.0% | 10,608 | 1.1% | 0.6% | 1.9% |
| Two or More Races | 18,034 | 1.9% | 23,345 | 2.4% | 26,432 | 2.6% | 2.6% | 2.1% |
| | 2000 | 2000 | 2010 | 2010 | 2016 | 2016 | 2000-10 | 2010-16 |
| | Census | Share | Census | Share | Estimates | Share | C.A.R. | C.A.R. |
| Ethnicity of Any Race | | | | | | | | |
| Hispanic or Latino | 24,422 | 2.6% | 35,264 | 3.6% | 40,055 | 4.0% | 3.7% | 2.1% |
| Not Hispanic, Latino | 905,200 | 97.4% | 949,336 | 96.4% | 963,426 | 96.0% | 0.5% | 0.2% |

Data provided by Experian, powered by Alteryx © 2016. Analysis and exhibit prepared by LandUseUSA © 2017.
 C.A.R. indicates compound annual rate.

Demographic Profiles | Marital Status and Education
Southeast Michigan Prosperity Region 9 | 2000 - 2016

| Region or County | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
|-------------------------|----------------|--------------|----------------|--------------|----------------|--------------|---------|---------|--------|
| Place Name | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
| | Region | Region | Region | Region | Region | Region | Region | Region | Region |
| | 2000 | 2000 | 2010 | 2010 | 2016 | 2016 | 2000-10 | 2010-16 | |
| | Census | Share | Census | Share | Estimates | Share | C.A.R. | C.A.R. | |
| Marital Status | | | | | | | | | |
| Spouse Present | 392,823 | 53.5% | 389,293 | 48.6% | 393,874 | 47.6% | -0.1% | 0.2% | |
| Spouse Absent | 29,546 | 4.0% | 24,457 | 3.1% | 24,069 | 2.9% | -1.9% | -0.3% | |
| Divorced | 67,710 | 9.2% | 91,803 | 11.5% | 92,855 | 11.2% | 3.1% | 0.2% | |
| Widowed | 38,999 | 5.3% | 40,719 | 5.1% | 44,060 | 5.3% | 0.4% | 1.3% | |
| Never Married | <u>205,319</u> | <u>28.0%</u> | <u>253,959</u> | <u>31.7%</u> | <u>273,231</u> | <u>33.0%</u> | 2.1% | 1.2% | |
| Summation | 734,397 | 100.0% | 800,231 | 100.0% | 828,089 | 100.0% | 0.9% | 0.6% | |
| Pop. Ages 15+ | 734,711 | 100.0% | 800,231 | 100.0% | 828,089 | 100.0% | 0.9% | 0.6% | |
| | 2000 | 2000 | 2010 | 2010 | 2016 | 2016 | 2000-10 | 2010-16 | |
| | Census | Share | Census | Share | Estimates | Share | C.A.R. | C.A.R. | |
| Educ. Attainment | | | | | | | | | |
| Grade K - 8 | 16,556 | 2.8% | 10,917 | 1.7% | 10,197 | 1.5% | -4.1% | -1.1% | |
| Grade 9 - 11 | 54,307 | 9.2% | 38,131 | 5.9% | 38,409 | 5.8% | -3.5% | 0.1% | |
| High School Grad. | 169,545 | 28.6% | 182,126 | 28.2% | 184,772 | 27.8% | 0.7% | 0.2% | |
| Some College Only | 138,906 | 23.5% | 158,665 | 24.6% | 160,672 | 24.1% | 1.3% | 0.2% | |
| Associates Degree | 41,691 | 7.0% | 51,320 | 7.9% | 54,817 | 8.2% | 2.1% | 1.1% | |
| Bachelor's Degree | 97,204 | 16.4% | 112,449 | 17.4% | 119,320 | 17.9% | 1.5% | 1.0% | |
| Graduate Degree | 70,964 | 12.0% | 87,042 | 13.5% | 92,596 | 13.9% | 2.1% | 1.0% | |
| No Schooling | <u>2,723</u> | <u>0.5%</u> | <u>5,012</u> | <u>0.8%</u> | <u>4,811</u> | <u>0.7%</u> | 6.3% | -0.7% | |
| Age 25+ Population | 591,896 | 100.0% | 645,662 | 100.0% | 665,594 | 100.0% | 0.9% | 0.5% | |

Data provided by Experian, powered by Alteryx © 2016. Analysis and exhibit prepared by LandUseUSA © 2017.
C.A.R. indicates compound annual rate.

Demographic Profiles | Labor Force and Employment
 Southeast Michigan Prosperity Region 9 | 2000 - 2016

| Region or County | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
|------------------------|----------------|--------------|----------------|--------------|----------------|--------------|---------|---------|
| Place Name | Region | Region | Region | Region | Region | Region | Region | Region |
| | 2000 | 2000 | 2010 | 2010 | 2016 | 2016 | 2000-10 | 2010-16 |
| | Census | Share | Census | Share | Estimates | Share | C.A.R. | C.A.R. |
| Employment | | | | | | | | |
| Employed Civilians | 464,541 | 95.9% | 448,213 | 88.9% | 463,669 | 94.7% | -0.4% | 0.6% |
| Unempld. Civilians | 19,823 | 4.1% | 55,602 | 11.0% | 25,354 | 5.2% | 10.9% | -12.3% |
| In Armed Forces | <u>266</u> | <u>0.1%</u> | <u>466</u> | <u>0.1%</u> | <u>491</u> | <u>0.1%</u> | 5.8% | 0.9% |
| Subtotal | 484,629 | 67.2% | 504,280 | 64.1% | 489,513 | 60.1% | 0.4% | -0.5% |
| Not In Labor Force | <u>236,950</u> | <u>32.8%</u> | <u>282,121</u> | <u>35.9%</u> | <u>325,490</u> | <u>39.9%</u> | 1.8% | 2.4% |
| Total Pop. Ages 16+ | 721,579 | 100.0% | 786,401 | 100.0% | 815,003 | 100.0% | 0.9% | 0.6% |
| | 2000 | 2000 | 2010 | 2010 | 2016 | 2016 | 2000-10 | 2010-16 |
| | Census | Share | Census | Share | Estimates | Share | C.A.R. | C.A.R. |
| Job Professions | | | | | | | | |
| % Blue Collar | 179,986 | 38.8% | 172,466 | 38.5% | 178,691 | 38.5% | -0.4% | 0.6% |
| % White Collar | <u>284,416</u> | <u>61.2%</u> | <u>275,747</u> | <u>61.5%</u> | <u>284,978</u> | <u>61.5%</u> | -0.3% | 0.6% |
| Total Professions | 464,402 | 100.0% | 448,213 | 100.0% | 463,669 | 100.0% | -0.4% | 0.6% |

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C.A.R. indicates compound annual rate.

Demographic Profiles | Population by Age Bracket
The State of Michigan | 2000 - 2016

| Region or County | Michigan | Michigan | Michigan | Michigan | Michigan | Michigan | Michigan | Michigan |
|-------------------|-------------------------------------|------------------------------------|-------------------------------------|------------------------------------|--|------------------------------------|--|--|
| Place Name | State of Michigan 2000 Census | State of Michigan 2000 Share | State of Michigan 2010 Census | State of Michigan 2010 Share | State of Michigan 2016 Estimates | State of Michigan 2016 Share | State of Michigan 2000-10 C.A.R. | State of Michigan 2010-16 C.A.R. |
| Total Population | 9,938,366 | 100.0% | 9,883,634 | 100.0% | 9,952,789 | 100.0% | -0.1% | 0.1% |
| Median Age | 36 | . | 39 | . | 40 | . | . | . |
| Per Capita Income | \$21,882 | . | \$25,787 | . | \$27,536 | . | 1.7% | 1.1% |
| Total Households | 3,785,653 | 100.0% | 3,872,514 | 100.0% | 3,896,366 | 100.0% | 0.2% | 0.1% |
| Avg. Hhld. Income | \$57,447 | . | \$65,030 | . | \$69,563 | . | 1.2% | 1.1% |
| Med. Hhld. Income | \$44,700 | . | \$46,895 | . | \$50,842 | . | 0.5% | 1.4% |
| Housing Units | | | | | | | | |
| Owner Occupied | . | . | 2,793,346 | 61.6% | 2,767,033 | 61.0% | . | -0.2% |
| Renter Occupied | . | . | 1,079,168 | <u>23.8%</u> | 1,129,333 | <u>24.9%</u> | . | 0.8% |
| Subtotal | 3,785,653 | 89.4% | 3,872,514 | 85.4% | 3,896,366 | 85.9% | 0.2% | 0.1% |
| Vacant | <u>448,619</u> | <u>10.6%</u> | <u>659,728</u> | <u>14.6%</u> | <u>641,932</u> | <u>14.1%</u> | 3.9% | -0.5% |
| Total Hsg. Units | 4,234,272 | 100.0% | 4,532,242 | 100.0% | 4,538,298 | 100.0% | 0.7% | 0.0% |

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C.A.R. indicates compound annual rate.



Section **BB**
Maps and Population
Monroe County

Prepared by:



LandUseUSA



seamless collaborative
urbanism + design + economics

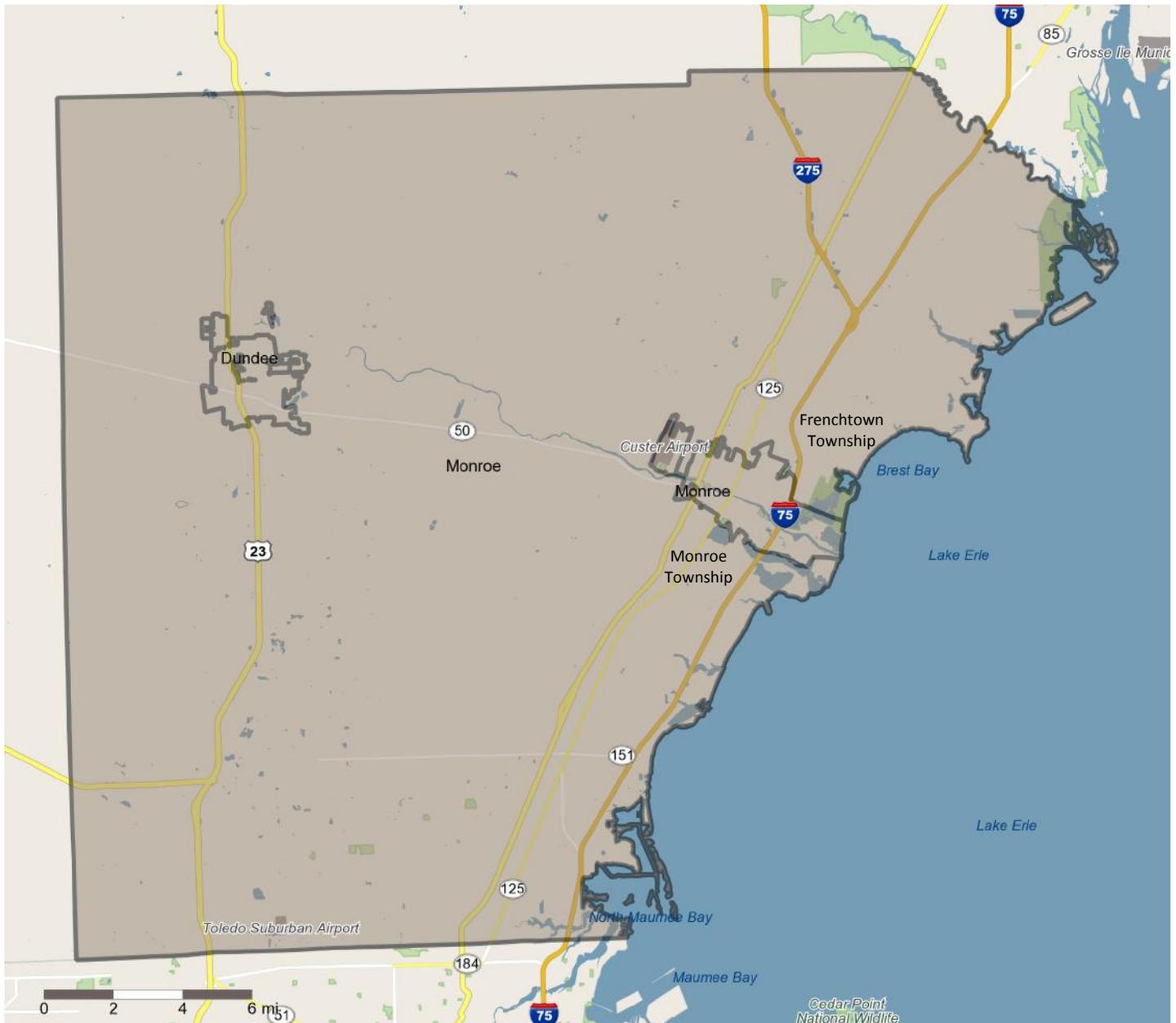
Prepared for:



City of Monroe
Monroe, Michigan
Incorporated in 1837

Geographic Setting, Water Features, and Highway Linkages The City of Monroe | Monroe County, Michigan

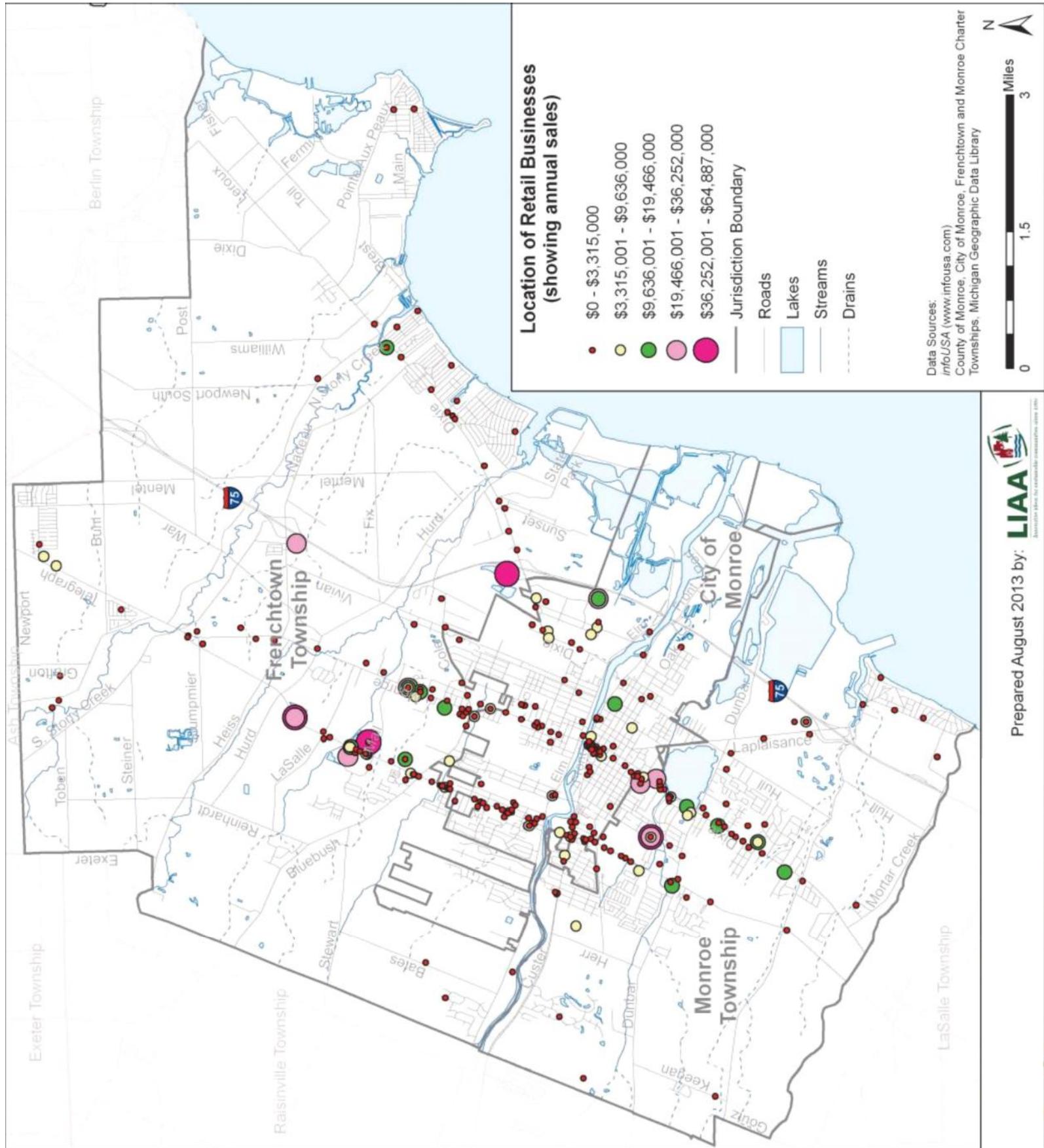
Exhibit BB.1



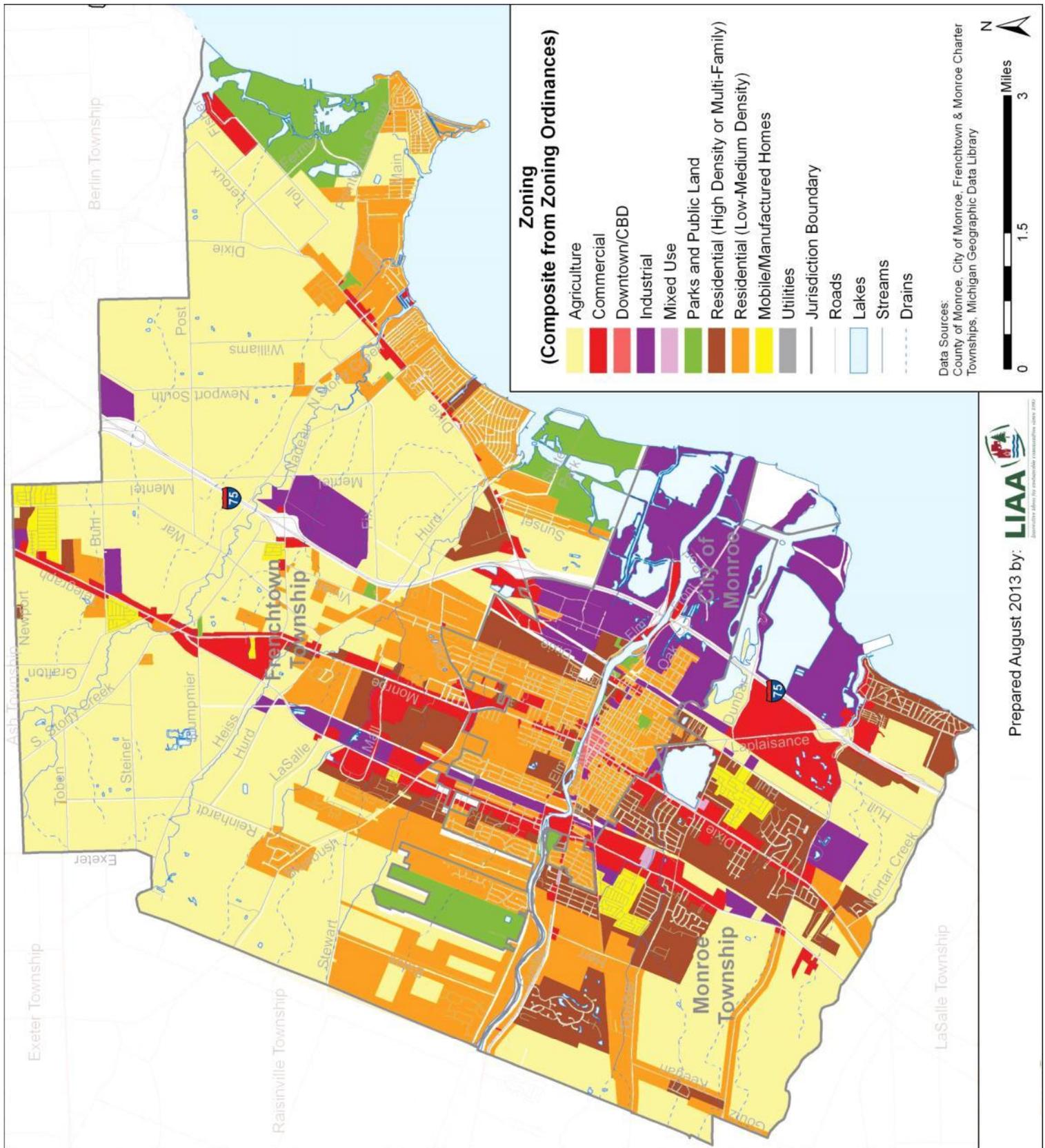
Source: Underlying map provided by Alteryx Decision Analytics;
exhibit prepared by LandUseUSA (c) 2016.

Retail Business Annual Sales The City of Monroe and Vicinity | 2013

Exhibit BB.2



Source: Resilient Monroe Resource Atlas, Map 6.7



Demographic Profiles | Population by Age Bracket
 Monroe County | SEM Prosperity Region 9 | 2000 - 2016

| Region or County | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
|-------------------|---------------|---------------|---------------|---------------|----------------|---------------|----------------|----------------|
| Place Name | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County |
| | 2000 Census | 2000 Share | 2010 Census | 2010 Share | 2016 Estimates | 2016 Share | 2000-10 C.A.R. | 2010-16 C.A.R. |
| Population Ages | | | | | | | | |
| 0 to 4 | 9,617 | 6.6% | 8,719 | 5.7% | 8,183 | 5.4% | -1.0% | -1.1% |
| 5 to 14 | 23,073 | 15.8% | 20,894 | 13.7% | 19,355 | 12.7% | -1.0% | -1.3% |
| 15 to 19 | 10,804 | 7.4% | 11,219 | 7.4% | 10,140 | 6.7% | 0.4% | -1.7% |
| 20 to 24 | 8,090 | 5.5% | 8,608 | 5.7% | 9,289 | 6.1% | 0.6% | 1.3% |
| 25 to 34 | 18,724 | 12.8% | 16,517 | 10.9% | 16,762 | 11.0% | -1.2% | 0.2% |
| 35 to 44 | 25,134 | 17.2% | 20,191 | 13.3% | 18,442 | 12.1% | -2.2% | -1.5% |
| 45 to 54 | 21,104 | 14.5% | 25,235 | 16.6% | 23,376 | 15.4% | 1.8% | -1.3% |
| 55 to 64 | 13,125 | 9.0% | 20,246 | 13.3% | 22,732 | 14.9% | 4.4% | 1.9% |
| 65 to 74 | 9,119 | 6.2% | 11,171 | 7.3% | 13,781 | 9.1% | 2.1% | 3.6% |
| 75 to 84 | 5,201 | 3.6% | 6,612 | 4.3% | 6,929 | 4.6% | 2.4% | 0.8% |
| 85+ | <u>1,934</u> | <u>1.3%</u> | <u>2,609</u> | <u>1.7%</u> | <u>3,096</u> | <u>2.0%</u> | 3.0% | 2.9% |
| Sum | 145,925 | 100.0% | 152,021 | 100.0% | 152,085 | 100.0% | 0.4% | 0.0% |
| Total Population | 145,924 | 100.0% | 152,020 | 100.0% | 152,085 | 100.0% | 0.4% | 0.0% |
| Median Age | 36 | . | 40 | . | 42 | . | . | . |
| Per Capita Income | \$22,259 | . | \$25,897 | . | \$27,283 | . | 1.5% | 0.9% |

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 C.A.R. indicates compound annual rate.

Demographic Profiles | Race and Ethnicity
 Monroe County | SEM Prosperity Region 9 | 2000 - 2016

| Region or County | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
|------------------------------|---------------|---------------|---------------|---------------|----------------|---------------|----------------|----------------|
| Place Name | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County |
| | 2000 Census | 2000 Share | 2010 Census | 2010 Share | 2016 Estimates | 2016 Share | 2000-10 C.A.R. | 2010-16 C.A.R. |
| Population by Race | | | | | | | | |
| White, Caucasian | 139,007 | 95.3% | 143,475 | 94.4% | 142,718 | 93.8% | 0.3% | -0.1% |
| Black, African Amer. | 2,576 | 1.8% | 3,237 | 2.1% | 3,523 | 2.3% | 2.3% | 1.4% |
| Amer. Indian, Aleut | 341 | 0.2% | 467 | 0.3% | 492 | 0.3% | 3.2% | 0.9% |
| Asian, Pacific Island. | 983 | 0.7% | 868 | 0.6% | 1,012 | 0.7% | -1.2% | 2.6% |
| Any Other Race | 823 | 0.6% | 1,278 | 0.8% | 1,406 | 0.9% | 4.5% | 1.6% |
| Two or More Races | 2,194 | 1.5% | 2,695 | 1.8% | 2,934 | 1.9% | 2.1% | 1.4% |
| | 2000 Census | 2000 Share | 2010 Census | 2010 Share | 2016 Estimates | 2016 Share | 2000-10 C.A.R. | 2010-16 C.A.R. |
| Ethnicity of Any Race | | | | | | | | |
| Hispanic or Latino | 2,624 | 1.8% | 4,667 | 3.1% | 5,158 | 3.4% | 5.9% | 1.7% |
| Not Hispanic, Latino | 143,300 | 98.2% | 147,353 | 96.9% | 146,927 | 96.6% | 0.3% | 0.0% |

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 C.A.R. indicates compound annual rate.

Demographic Profiles | Marital Status and Education
 Monroe County | SEM Prosperity Region 9 | 2000 - 2016

| Region or County | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
|-------------------------|---------------|---------------|---------------|---------------|----------------|---------------|----------------|----------------|---------------|
| Place Name | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County |
| | 2000 Census | 2000 Share | 2010 Census | 2010 Share | 2016 Estimates | 2016 Share | 2000-10 C.A.R. | 2010-16 C.A.R. | |
| Marital Status | | | | | | | | | |
| Spouse Present | 66,895 | 59.1% | 66,714 | 54.5% | 63,144 | 50.7% | 0.0% | -0.9% | |
| Spouse Absent | 2,755 | 2.4% | 3,333 | 2.7% | 3,517 | 2.8% | 1.9% | 0.9% | |
| Divorced | 10,526 | 9.3% | 14,248 | 11.6% | 15,611 | 12.5% | 3.1% | 1.5% | |
| Widowed | 7,181 | 6.3% | 7,989 | 6.5% | 8,137 | 6.5% | 1.1% | 0.3% | |
| Never Married | <u>25,818</u> | <u>22.8%</u> | <u>30,124</u> | <u>24.6%</u> | <u>34,138</u> | <u>27.4%</u> | 1.6% | 2.1% | |
| Summation | 113,175 | 100.0% | 122,408 | 100.0% | 124,547 | 100.0% | 0.8% | 0.3% | |
| Pop. Ages 15+ | 113,235 | 100.0% | 122,408 | 100.0% | 124,547 | 100.0% | 0.8% | 0.3% | |
| | 2000 Census | 2000 Share | 2010 Census | 2010 Share | 2016 Estimates | 2016 Share | 2000-10 C.A.R. | 2010-16 C.A.R. | |
| Educ. Attainment | | | | | | | | | |
| Grade K - 8 | 4,070 | 4.3% | 3,091 | 3.0% | 2,559 | 2.4% | -2.7% | -3.1% | |
| Grade 9 - 11 | 11,455 | 12.2% | 7,525 | 7.3% | 7,655 | 7.3% | -4.1% | 0.3% | |
| High School Grad. | 35,162 | 37.3% | 35,756 | 34.9% | 37,233 | 35.4% | 0.2% | 0.7% | |
| Some College Only | 22,737 | 24.1% | 27,690 | 27.0% | 27,705 | 26.4% | 2.0% | 0.0% | |
| Associates Degree | 6,931 | 7.4% | 8,998 | 8.8% | 9,884 | 9.4% | 2.6% | 1.6% | |
| Bachelor's Degree | 9,061 | 9.6% | 11,018 | 10.7% | 11,824 | 11.2% | 2.0% | 1.2% | |
| Graduate Degree | 4,463 | 4.7% | 7,703 | 7.5% | 7,367 | 7.0% | 5.6% | -0.7% | |
| No Schooling | <u>398</u> | <u>0.4%</u> | <u>800</u> | <u>0.8%</u> | <u>891</u> | <u>0.8%</u> | 7.2% | 1.8% | |
| Age 25+ Population | 94,277 | 100.0% | 102,581 | 100.0% | 105,118 | 100.0% | 0.8% | 0.4% | |

Data provided by Experian, powered by Alteryx © 2016. Analysis and exhibit prepared by LandUseUSA © 2017.
 C.A.R. indicates compound annual rate.

Demographic Profiles | Labor Force and Employment
 Monroe County | SEM Prosperity Region 9 | 2000 - 2016

| Region or County | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
|------------------------|---------------|---------------|---------------|---------------|----------------|---------------|----------------|----------------|
| Place Name | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County | Monroe County |
| | 2000 Census | 2000 Share | 2010 Census | 2010 Share | 2016 Estimates | 2016 Share | 2000-10 C.A.R. | 2010-16 C.A.R. |
| Employment | | | | | | | | |
| Employed Civilians | 70,363 | 96.4% | 66,694 | 87.4% | 66,764 | 94.2% | -0.5% | 0.0% |
| Unempld. Civilians | 2,547 | 3.5% | 9,534 | 12.5% | 4,076 | 5.8% | 14.1% | -13.2% |
| In Armed Forces | <u>45</u> | <u>0.1%</u> | <u>48</u> | <u>0.1%</u> | <u>55</u> | <u>0.1%</u> | 0.6% | 2.3% |
| Subtotal | 72,955 | 65.7% | 76,276 | 63.5% | 70,895 | 57.9% | 0.4% | -1.2% |
| Not In Labor Force | <u>38,022</u> | <u>34.3%</u> | <u>43,779</u> | <u>36.5%</u> | <u>51,490</u> | <u>42.1%</u> | 1.4% | 2.7% |
| Total Pop. Ages 16+ | 110,977 | 100.0% | 120,055 | 100.0% | 122,385 | 100.0% | 0.8% | 0.3% |
| | 2000 Census | 2000 Share | 2010 Census | 2010 Share | 2016 Estimates | 2016 Share | 2000-10 C.A.R. | 2010-16 C.A.R. |
| Job Professions | | | | | | | | |
| % Blue Collar | 35,018 | 49.8% | 33,678 | 50.5% | 34,032 | 51.0% | -0.4% | 0.2% |
| % White Collar | <u>35,320</u> | <u>50.2%</u> | <u>33,016</u> | <u>49.5%</u> | <u>32,732</u> | <u>49.0%</u> | -0.7% | -0.1% |
| Total Professions | 70,338 | 100.0% | 66,694 | 100.0% | 66,764 | 100.0% | -0.5% | 0.0% |

Data provided by Experian, powered by Alteryx © 2016. Analysis and exhibit prepared by LandUseUSA © 2017.

C.A.R. indicates compound annual rate.



Section **CC**
Maps and Population
The City of Monroe

Prepared by:



LandUseUSA



seamless collaborative
urbanism + design + economics

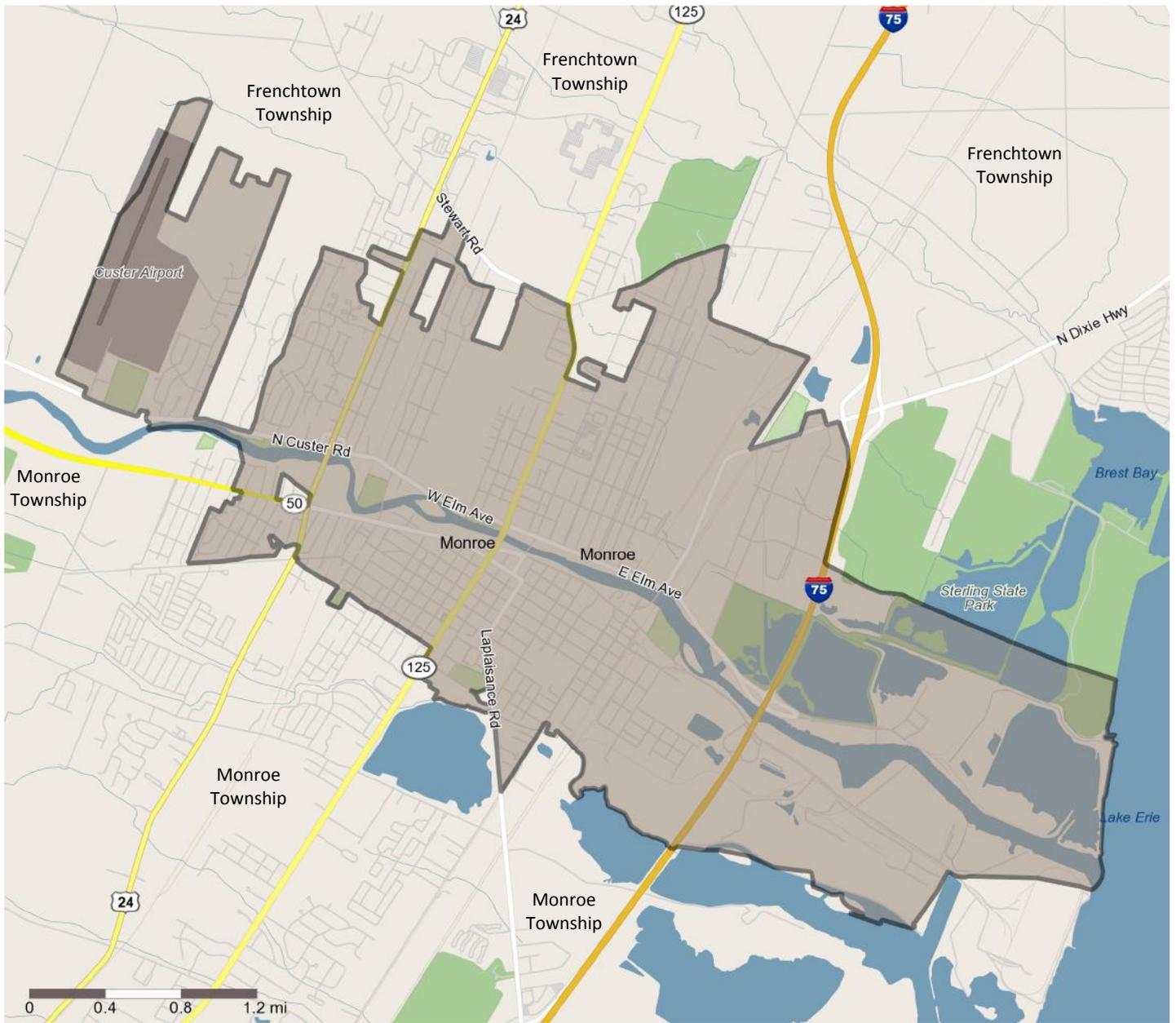
Prepared for:



City of Monroe
Monroe, Michigan
Incorporated in 1837

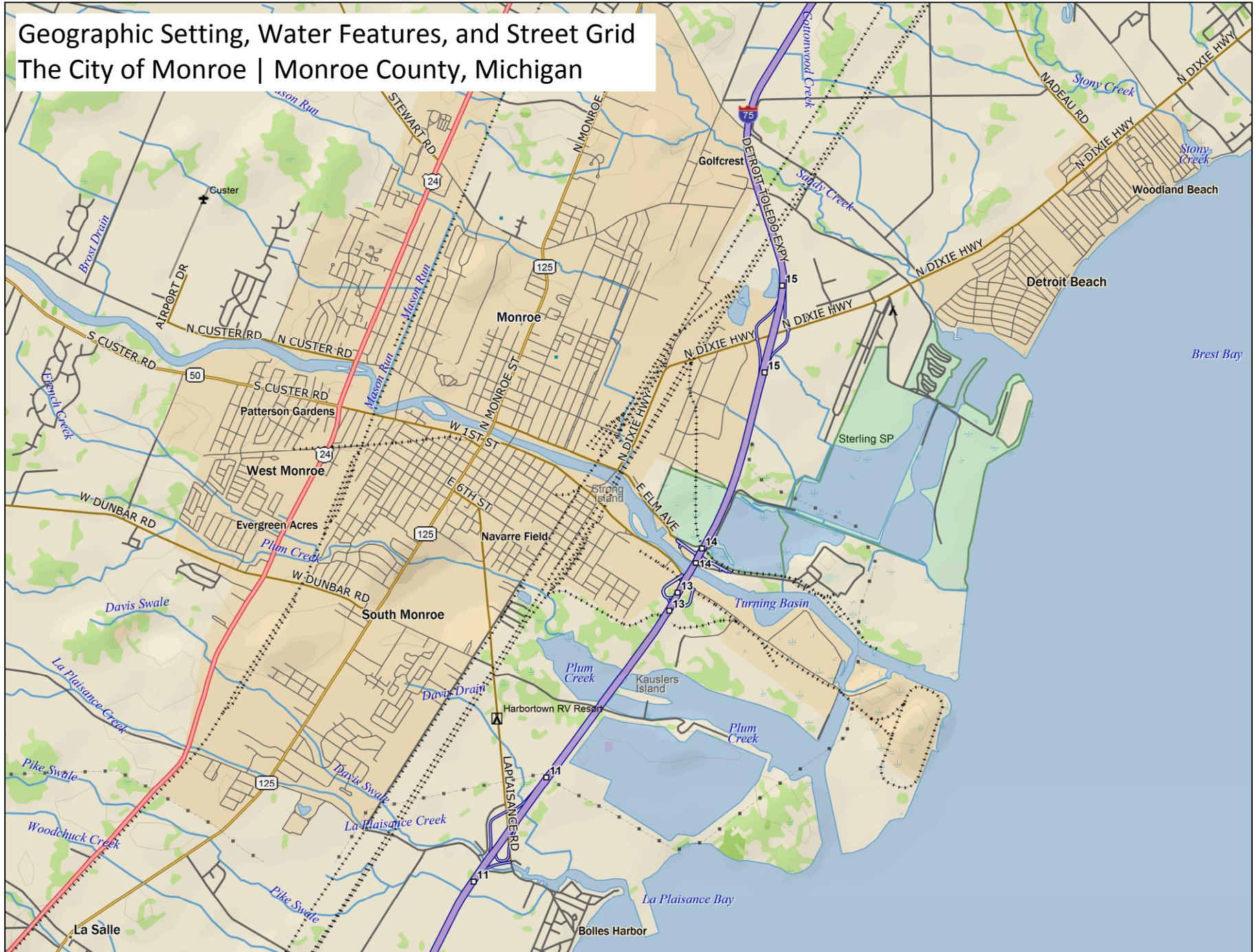
Geographic Setting, Water Features, and Highway Linkages The City of Monroe | Monroe County, Michigan

Exhibit CC.1

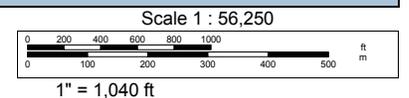


Source: Underlying map provided by Alteryx Decision Analytics;
exhibit prepared by LandUseUSA (c) 2016.

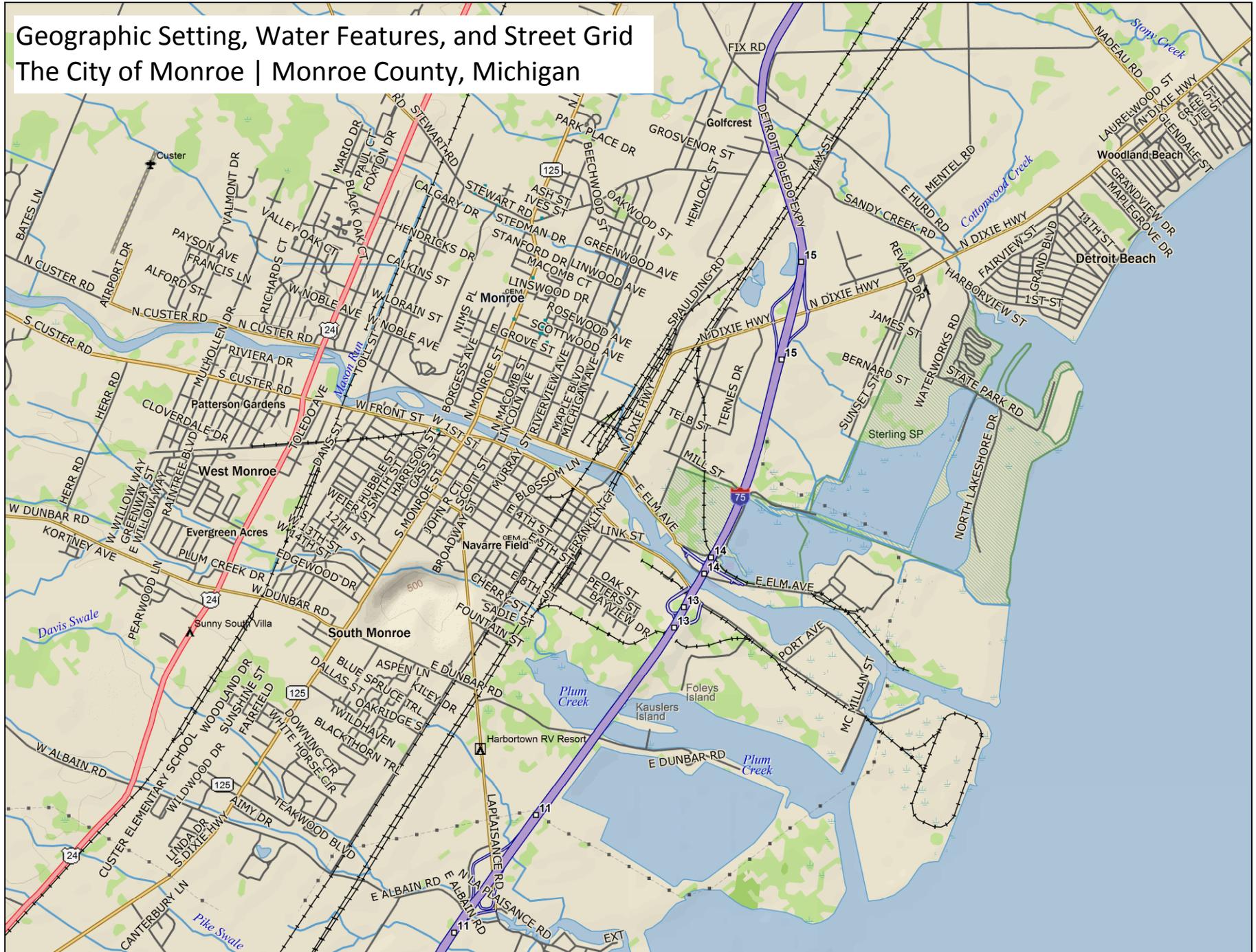
Geographic Setting, Water Features, and Street Grid The City of Monroe | Monroe County, Michigan



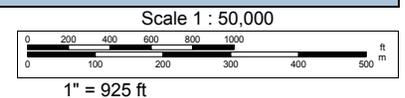
Underlying map provided by Delorme; exhibit prepared by LandUseUSA, 2016 (c) with all rights reserved.

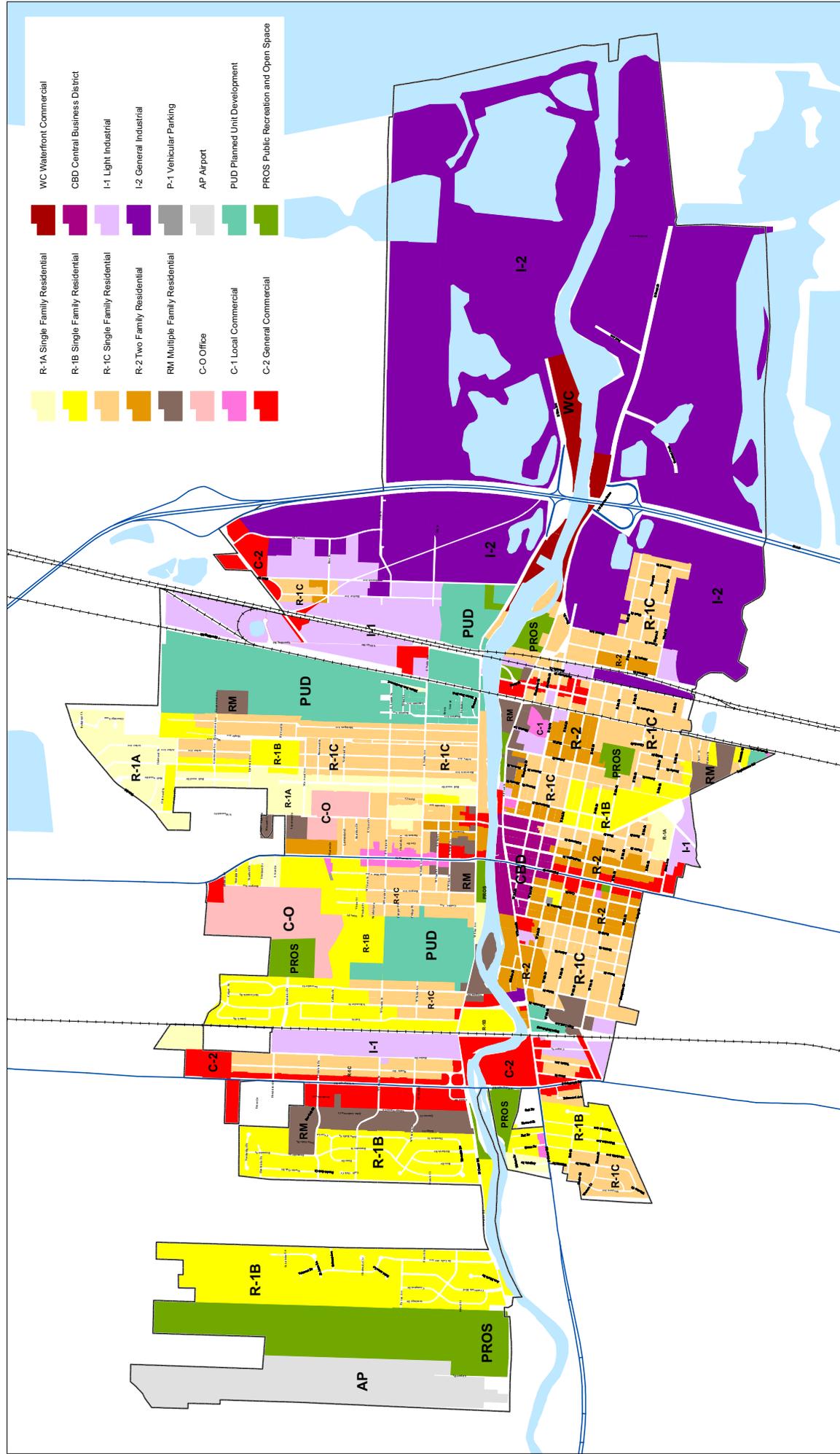


Geographic Setting, Water Features, and Street Grid The City of Monroe | Monroe County, Michigan



Underlying map provided by Delorme; exhibit prepared by LandUseUSA, 2016 (c) with all rights reserved.





Official Zoning Map

City of Monroe

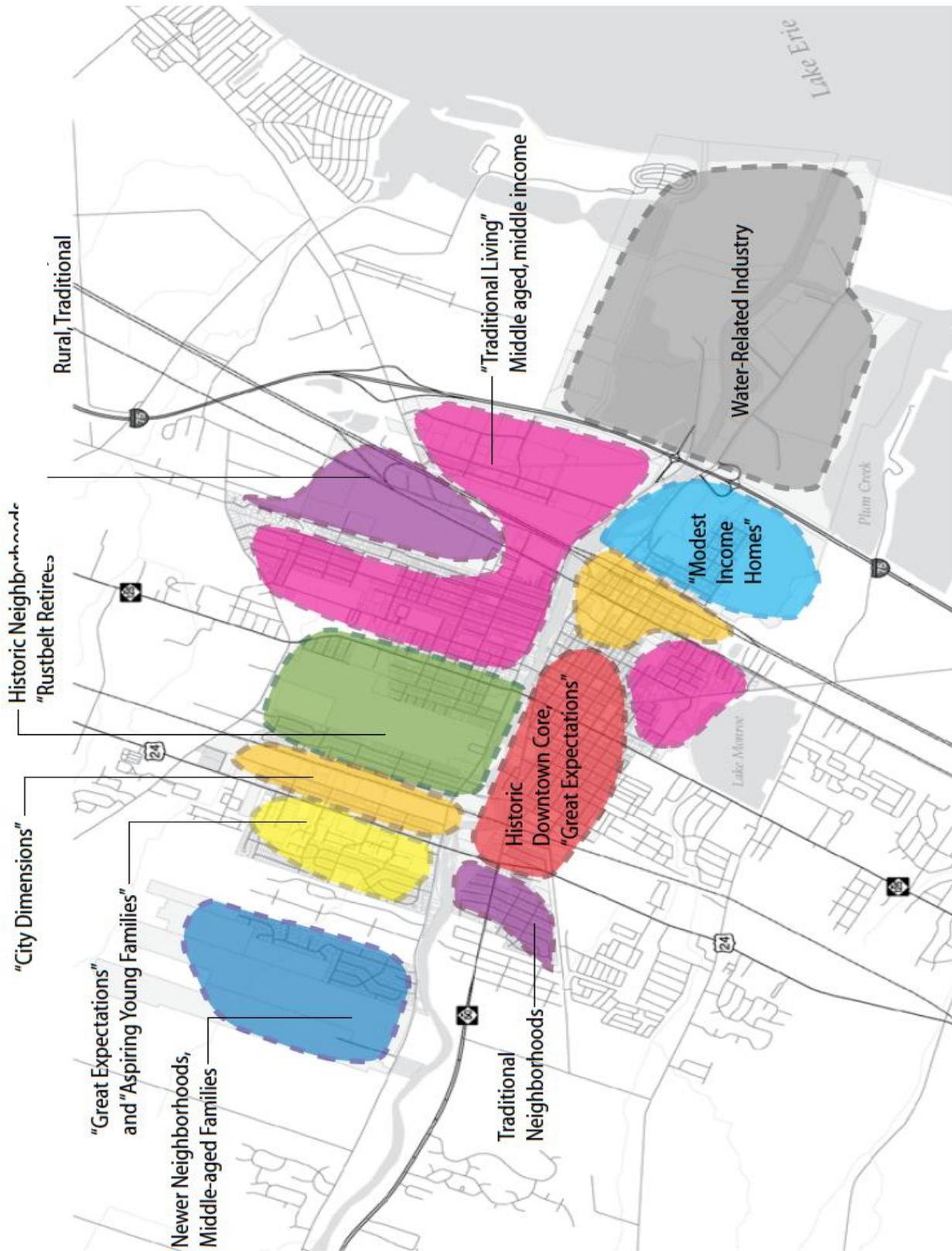
1 inch = 1,000 feet



Disclaimer: This zoning map features a representative scale and is not intended to be substituted for an official survey or used to resolve boundary or area issues. Consult official City of Monroe records for dimensions and areas of parcels and boundaries.

Date: 19 September 2016
 Sources: City of Monroe Assessor's Office, MCGI







Significant Events Impacting the Local Economy
 The City of Monroe | SEM Prosperity Region 9 | 2017

| | Water Front? | Down Town? | Company or Catalyst | Description and Notes |
|---|--------------|------------|---|--|
| 1 | No | No | ProMedica Monroe Regional Hospital relocation | ProMedica Monroe Regional Hospital has announced plans to replace its facility in the City of Monroe on N Macomb St, which dates from 1964, with a new campus at I-75 and N Dixie Hwy, on the site currently occupied by the River Raisin Golf Course in Frenchtown Charter Twp. Construction is scheduled to begin in 2020. Planning consultants have been retained to develop a vision for repurposing the existing hospital campus. |
| 2 | No | No | Yanfeng Automotive Interiors Layoffs | Yanfeng Automotive Interiors has announced 300 layoffs at its two Frenchtown Twp plants in April 2017. This is linked to Fiat Chrysler's decision to move production of the Jeep Cherokee from Toledo to Belvidere, IL. |
| 3 | No | No | Ventower Industries Workforce Contraction | Ventower Industries has eliminated 84 positions since October 2016; linked to market shifts in demand for wind turbines. |
| 4 | No | No | Monroe County Community College Millage | A millage was approved by Monroe County voters in 2016 that enables Monroe Community College to invest in accessibility, technology, and upgrades. |

Based on stakeholder input and market research; prepared by LandUseUSA and Seamless Collaborative, 2017.
 This list has not been field-verified and is subject to revision with additional input from local stakeholders.

Reinvestment Opportunities | Missing Middle Housing and Mixed-Use
 The City of Monroe | Monroe County, Michigan | 2017

| | Water Front? | Down Town? | Current Use Existing Conditions | Future Use Investment Opportunities |
|---|--------------|------------|---|--|
| 1 | Yes | Yes | 11 E Front St (north side of street). Storefront houses Stevens Family Chiropractic & Well Life Center. Grated 1960s-era façade. | Potential for historical rehab of upper units as residential flats. |
| 2 | Yes | Yes | 19 E Front St (north side of street). Storefront houses law offices of Godfroy, Wetzel & Horkey. | Potential for historical rehab of upper units as residential flats. |
| 3 | Yes | Yes | 111 E Front St (north side of street). Vacant two-level building with retail storefront built 1900. Upper level includes two-bedroom flat. | Potential for historical rehab of building with new retail or restaurant use on ground floor. Upper level can be rehabbed as two-bedroom flat. |
| 4 | Yes | Yes | 127 E Front St (north side of street). Two-level building has vacant storefront in north portion formerly housing law offices of Jeffery A. Yorkey. South storefront is occupied by 129 Lounge. | Potential for historical rehab of northern storefront to house new retail or restaurant use. Upper unit on northern end can be converted to a flat with river views. |
| 5 | Yes | Yes | 327 E Front St (north side of street). Primera Iglesia Hispana de Monroe building. Street-facing portion of building occupied by offices. | Potential for historical rehab to rear of building to accommodate loft units with river views or incubator kitchen with pop-up restaurants. |

Based on stakeholder input and market research; prepared by LandUseUSA and Seamless Collaborative, 2017.

This list has not been field-verified and is subject to revision with additional input from local stakeholders.

Reinvestment Opportunities | Missing Middle Housing and Mixed-Use
 The City of Monroe | Monroe County, Michigan | 2017

| | Water Front? | Down Town? | Current Use Existing Conditions | Future Use Investment Opportunities |
|----|--------------|------------|---|---|
| 6 | Yes | Yes | 411 E Front St (north side of street). Former Silver Que billiards parlor. Vacant storefront with flat above. | Potential for historical rehab of storefront for art gallery, retail, or restaurant use and rehabilitate upper unit as residential flats. |
| 7 | No | Yes | 402-408 E Front St (south side of street). One-level building with built-in garage bay. | Potential to be repurposed as 1-2 live/work units with gallery space. |
| 8 | Yes | Yes | 12 S Monroe St (west side of street). Two-level building. Storefront houses White Sewing Center. Grated 1960s-era façade. | Potential for historical rehab of upper units as residential flats. |
| 9 | No | Yes | 34 S Monroe St (west side of street). Three-level building. Storefront houses Brent's Locksmith. Upper level formerly housed Art Up! gallery. | Potential for historical rehab of upper levels and convert to flats or two-level loft. |
| 10 | No | Yes | 36-38 S Monroe St (west side of street). Three-level building. Storefront formerly housed Monroe Optical. | Potential for historical rehab of upper levels and convert to flats or two-level loft. |

Based on stakeholder input and market research; prepared by LandUseUSA and Seamless Collaborative, 2017.
 This list has not been field-verified and is subject to revision with additional input from local stakeholders.

Reinvestment Opportunities | Missing Middle Housing and Mixed-Use
 The City of Monroe | Monroe County, Michigan | 2017

| | Water Front? | Down Town? | Current Use Existing Conditions | Future Use Investment Opportunities |
|----|--------------|------------|--|---|
| 11 | No | Yes | 40 S Monroe St (west side of street). Three-level building damaged in fire on Dec. 31, 2016. | Potential for historical rehab of storefront for retail or restaurant use, and rehabilitate upper units as residential flats. |
| 12 | No | Yes | 44-48 S Monroe St (west side of street). Neighboring three-level buildings share 1960s-era façade on 1st and 2nd levels. Both storefronts vacant; formerly Monroe Community Players rehearsal space and Then & Now Consignment shop. | Potential for historical rehab of storefronts for retail and/or restaurant use. Rehabilitate upper units as residential flats or two-level lofts. |
| 13 | Yes | Yes | 8 N Monroe St; former Masonic Temple Building. Three-level brick building with riverfront access. 5,500 sq. ft. per floor. | Potential to repurpose as apartments and/or live-work spaces. |
| 14 | No | No | 942 E 1st St (north side of street). Former Monroe Auto Equipment Co. (MAECO) manufacturing site. Factory demolished; only chimney remains. Brownfield site. | Potential for new infill development containing condos, loft apartments. Chimney should be maintained as historical feature. |

Based on stakeholder input and market research; prepared by LandUseUSA and Seamless Collaborative, 2017.
 This list has not been field-verified and is subject to revision with additional input from local stakeholders.

Reinvestment Opportunities | Missing Middle Housing and Mixed-Use
 The City of Monroe | Monroe County, Michigan | 2017

| | Water Front? | Down Town? | Current Use Existing Conditions | Future Use Investment Opportunities |
|----|--------------|------------|--|--|
| 15 | No | No | 1030 E 2nd St (south side of street). Former City of Faith Christian Center bldg (known locally as the "purple church"). Three-level brick building. | Potential to repurpose as apartments and/or live-work spaces for small-scale entrepreneurs. |
| 16 | No | No | 102 Winchester Street Apartments; 6 units in a two-level corner building, built in 1913. | Candidate for mixed-use neighborhood use. Appears to have vinyl applied over original brick, so might be a candidate for facade restoration. |
| 17 | No | No | 112 Winchester St (west side of street). One-level building with two units. Slate façade. | Potential to be repurposed as a live-work unit with a retail storefront. |
| 18 | No | No | 80 Jerome St (west side of street). Former Sack's Furniture showroom and warehouse complex. Two-level brick building with two storefronts; attached two-level brick warehouse. | Potential for historical rehab of storefronts to house galleries, restaurant, or retail. Units above storefronts can be converted to flats. Warehouse space can be repurposed as loft apartments. Maintain existing vintage signage as historical feature. |
| 19 | No | No | 52 Murray St (west side of street). Two-level brick building with vinyl siding on upper floors. Two storefronts. | Potential to repurpose as live-work spaces with flats above storefronts. |

Based on stakeholder input and market research; prepared by LandUseUSA and Seamless Collaborative, 2017. This list has not been field-verified and is subject to revision with additional input from local stakeholders.

Reinvestment Opportunities for Retail and Missing Middle Housing
 The City of Monroe | SEM Prosperity Region 9 | 2017

| | Water Front? | Down Town? | Current Use Existing Conditions | Future Use Investment Opportunities |
|----|--------------|------------|--|--|
| 20 | No | Yes | 405 S Monroe St (east side of street). One-level building, beige glazed brick façade and red tile roof. Joe's Standard Service. One of only 25 remaining Standard Oil "Red Crown" prototype stations built in the 1920s-1930s. | Potential for historic rehab and repurpose as a restaurant-café if no longer needed for auto repairs. |
| 21 | No | No | 211 E 5th St (north side of street). Two-level stacked duplex. | Potential for historic rehab and/or repurpose as a live-work space with lower level storefront. |
| 22 | No | No | 229 Smith St (east side of street). One-level brick building with storefront and garage bay. | Potential for historical rehab and repurpose as neighborhood retail space or live-work unit with storefront. |
| 23 | No | No | 423 W 5th St (south side of street). Two-level small multiplex with storefront apartment. | Potential to repurpose storefront as a live-work unit. |
| 24 | No | No | 509 Adams St (east side of street). Two-level stone cottage with attached garage unit. | Potential for historical rehab and repurpose as a live-work unit with storefront or gallery space in garage bay; one to two flats in cottage. |
| 25 | No | No | 615 S Telegraph Rd (east side of street). Two-level commercial building with art deco porcelain tile and stone façade. 7,400 sq. ft. Built 1942. | Potential for historical rehab with ground floor used for gallery, retail, or restaurant. Rear of building and upper level could be repurposed as lofts. |

Based on stakeholder input and market research; prepared by LandUseUSA and Seamless Collaborative, 2017. This list has not been field-verified and is subject to revision with additional input from local stakeholders.

Demographic Profiles | Population by Age Bracket
 The City of Monroe | Monroe Co. | 2000 - 2016

| Region or County | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
|-------------------|----------------------------------|---------------------------------|----------------------------------|---------------------------------|-------------------------------------|---------------------------------|-------------------------------------|-------------------------------------|
| Place Name | City of Monroe 2000 Census | City of Monroe 2000 Share | City of Monroe 2010 Census | City of Monroe 2010 Share | City of Monroe 2016 Estimates | City of Monroe 2016 Share | City of Monroe 2000-10 C.A.R. | City of Monroe 2010-16 C.A.R. |
| Population Ages | | | | | | | | |
| 0 to 4 | 1,524 | 7.1% | 1,534 | 7.4% | 1,434 | 7.0% | 0.1% | -1.1% |
| 5 to 14 | 3,298 | 15.5% | 2,869 | 13.9% | 2,813 | 13.7% | -1.4% | -0.3% |
| 15 to 19 | 1,462 | 6.9% | 1,464 | 7.1% | 1,318 | 6.4% | 0.0% | -1.7% |
| 20 to 24 | 1,334 | 6.3% | 1,374 | 6.6% | 1,391 | 6.8% | 0.3% | 0.2% |
| 25 to 34 | 3,031 | 14.2% | 2,759 | 13.3% | 2,750 | 13.4% | -0.9% | -0.1% |
| 35 to 44 | 3,359 | 15.8% | 2,614 | 12.6% | 2,486 | 12.1% | -2.5% | -0.8% |
| 45 to 54 | 2,616 | 12.3% | 2,945 | 14.2% | 2,756 | 13.4% | 1.2% | -1.1% |
| 55 to 64 | 1,554 | 7.3% | 2,313 | 11.2% | 2,538 | 12.4% | 4.1% | 1.6% |
| 65 to 74 | 1,375 | 6.5% | 1,269 | 6.1% | 1,455 | 7.1% | -0.8% | 2.3% |
| 75 to 84 | 1,188 | 5.6% | 988 | 4.8% | 951 | 4.6% | -1.8% | -0.6% |
| 85+ | <u>583</u> | <u>2.7%</u> | <u>578</u> | <u>2.8%</u> | <u>655</u> | <u>3.2%</u> | -0.1% | 2.1% |
| Sum | 21,325 | 100.0% | 20,707 | 100.0% | 20,547 | 100.0% | -0.3% | -0.1% |
| Total Population | 21,325 | 100.0% | 20,707 | 100.0% | 20,547 | 100.0% | -0.3% | -0.1% |
| Median Age | 35 | . | 36 | . | 37 | . | . | . |
| Per Capita Income | \$19,179 | . | \$21,978 | . | \$22,888 | . | 1.4% | 0.7% |

Data provided by Experian, powered by Alteryx © 2016. Analysis and exhibit prepared by LandUseUSA © 2017.
 Demographic profiles are also available for the cities of Dundee, Tecumseh, and Adrian upon request.
 C.A.R. indicates compound annual rate.

Demographic Profiles | Race and Ethnicity
 The City of Monroe | Monroe Co. | 2000 - 2016

| Region or County | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
|------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| Place Name | City of Monroe | City of Monroe | City of Monroe | City of Monroe | City of Monroe | City of Monroe | City of Monroe | City of Monroe |
| | 2000 Census | 2000 Share | 2010 Census | 2010 Share | 2016 Estimates | 2016 Share | 2000-10 C.A.R. | 2010-16 C.A.R. |
| Population by Race | | | | | | | | |
| White, Caucasian | 19,408 | 91.0% | 18,349 | 88.6% | 17,919 | 87.2% | -0.6% | -0.4% |
| Black, African Amer. | 1,053 | 4.9% | 1,252 | 6.0% | 1,408 | 6.9% | 1.7% | 2.0% |
| Amer. Indian, Aleut | 19 | 0.1% | 83 | 0.4% | 90 | 0.4% | 15.9% | 1.4% |
| Asian, Pacific Island. | 261 | 1.2% | 145 | 0.7% | 168 | 0.8% | -5.7% | 2.5% |
| Any Other Race | 126 | 0.6% | 268 | 1.3% | 295 | 1.4% | 7.8% | 1.6% |
| Two or More Races | 458 | 2.2% | 610 | 2.9% | 667 | 3.3% | 2.9% | 1.5% |
| Ethnicity of Any Race | | | | | | | | |
| Hispanic or Latino | 542 | 2.5% | 925 | 4.5% | 1,017 | 5.0% | 5.5% | 1.6% |
| Not Hispanic, Latino | 20,782 | 97.5% | 19,782 | 95.5% | 19,530 | 95.1% | -0.5% | -0.2% |

Data provided by Experian, powered by Alteryx © 2016. Analysis and exhibit prepared by LandUseUSA © 2017.
 Demographic profiles are also available for the cities of Dundee, Tecumseh, and Adrian upon request.
 C.A.R. indicates compound annual rate.

Demographic Profiles | Marital Status and Education
 The City of Monroe | Monroe Co. | 2000 - 2016

| Region or County | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
|-------------------------|-------------------------------------|------------------------------------|-------------------------------------|------------------------------------|--|------------------------------------|--|--|
| Place Name | City of Monroe 2000 Census | City of Monroe 2000 Share | City of Monroe 2010 Census | City of Monroe 2010 Share | City of Monroe 2016 Estimates | City of Monroe 2016 Share | City of Monroe 2000-10 C.A.R. | City of Monroe 2010-16 C.A.R. |
| Marital Status | | | | | | | | |
| Spouse Present | 8,025 | 48.3% | 7,327 | 44.9% | 6,439 | 39.5% | -0.9% | -2.1% |
| Spouse Absent | 648 | 3.9% | 695 | 4.3% | 706 | 4.3% | 0.7% | 0.3% |
| Divorced | 1,937 | 11.7% | 2,197 | 13.5% | 2,582 | 15.8% | 1.3% | 2.7% |
| Widowed | 1,315 | 7.9% | 1,280 | 7.9% | 1,261 | 7.7% | -0.3% | -0.2% |
| Never Married | <u>4,673</u> | <u>28.2%</u> | <u>4,805</u> | <u>29.5%</u> | <u>5,312</u> | <u>32.6%</u> | 0.3% | 1.7% |
| Summation | 16,598 | 100.0% | 16,304 | 100.0% | 16,300 | 100.0% | -0.2% | 0.0% |
| Pop. Ages 15+ | 16,503 | 100.0% | 16,303 | 100.0% | 16,300 | 100.0% | -0.1% | 0.0% |
| Educ. Attainment | | | | | | | | |
| Grade K - 8 | 858 | 6.2% | 662 | 4.9% | 530 | 3.9% | -2.6% | -3.7% |
| Grade 9 - 11 | 1,899 | 13.8% | 1,047 | 7.8% | 1,049 | 7.7% | -5.8% | 0.0% |
| High School Grad. | 4,786 | 34.8% | 4,238 | 31.5% | 4,457 | 32.8% | -1.2% | 0.8% |
| Some College Only | 3,008 | 21.8% | 3,648 | 27.1% | 3,560 | 26.2% | 1.9% | -0.4% |
| Associates Degree | 876 | 6.4% | 1,235 | 9.2% | 1,332 | 9.8% | 3.5% | 1.3% |
| Bachelor's Degree | 1,387 | 10.1% | 1,518 | 11.3% | 1,542 | 11.3% | 0.9% | 0.3% |
| Graduate Degree | 823 | 6.0% | 1,013 | 7.5% | 998 | 7.3% | 2.1% | -0.3% |
| No Schooling | <u>135</u> | <u>1.0%</u> | <u>104</u> | <u>0.8%</u> | <u>123</u> | <u>0.9%</u> | -2.6% | 2.9% |
| Age 25+ Population | 13,772 | 100.0% | 13,465 | 100.0% | 13,591 | 100.0% | -0.2% | 0.2% |

Data provided by Experian, powered by Alteryx © 2016. Analysis and exhibit prepared by LandUseUSA © 2017.
 Demographic profiles are also available for the cities of Dundee, Tecumseh, and Adrian upon request.
 C.A.R. indicates compound annual rate.

Demographic Profiles | Labor Force and Employment
 The City of Monroe | Monroe Co. | 2000 - 2016

| Region or County | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
|------------------------|-------------------------------------|------------------------------------|-------------------------------------|------------------------------------|--|------------------------------------|--|--|
| Place Name | City of Monroe 2000 Census | City of Monroe 2000 Share | City of Monroe 2010 Census | City of Monroe 2010 Share | City of Monroe 2016 Estimates | City of Monroe 2016 Share | City of Monroe 2000-10 C.A.R. | City of Monroe 2010-16 C.A.R. |
| Employment | | | | | | | | |
| Employed Civilians | 9,501 | 96.4% | 8,515 | 87.1% | 8,366 | 93.9% | -1.1% | -0.3% |
| Unempld. Civilians | 353 | 3.6% | 1,252 | 12.8% | 535 | 6.0% | 13.5% | -13.2% |
| In Armed Forces | <u>5</u> | <u>0.1%</u> | <u>5</u> | <u>0.1%</u> | <u>5</u> | <u>0.1%</u> | . | . |
| Subtotal | 9,859 | 60.9% | 9,772 | 61.0% | 8,906 | 55.6% | -0.1% | -1.5% |
| Not In Labor Force | <u>6,340</u> | <u>39.1%</u> | <u>6,241</u> | <u>39.0%</u> | <u>7,114</u> | <u>44.4%</u> | -0.2% | 2.2% |
| Total Pop. Ages 16+ | 16,199 | 100.0% | 16,013 | 100.0% | 16,020 | 100.0% | -0.1% | 0.0% |
| | 2000 Census | 2000 Share | 2010 Census | 2010 Share | 2016 Estimates | 2016 Share | 2000-10 C.A.R. | 2010-16 C.A.R. |
| Job Professions | | | | | | | | |
| % Blue Collar | 4,574 | 47.8% | 4,355 | 51.1% | 4,325 | 51.7% | -0.5% | -0.1% |
| % White Collar | <u>4,996</u> | <u>52.2%</u> | <u>4,160</u> | <u>48.9%</u> | <u>4,041</u> | <u>48.3%</u> | -1.8% | -0.5% |
| Total Professions | 9,570 | 100.0% | 8,515 | 100.0% | 8,366 | 100.0% | -1.2% | -0.3% |

Data provided by Experian, powered by Alteryx © 2016. Analysis and exhibit prepared by LandUseUSA © 2017.

Demographic profiles are also available for the cities of Dundee, Tecumseh, and Adrian upon request.

C.A.R. indicates compound annual rate.



Section **DD**
Maps and Population
Half Mile Radius

Prepared by:



LandUseUSA



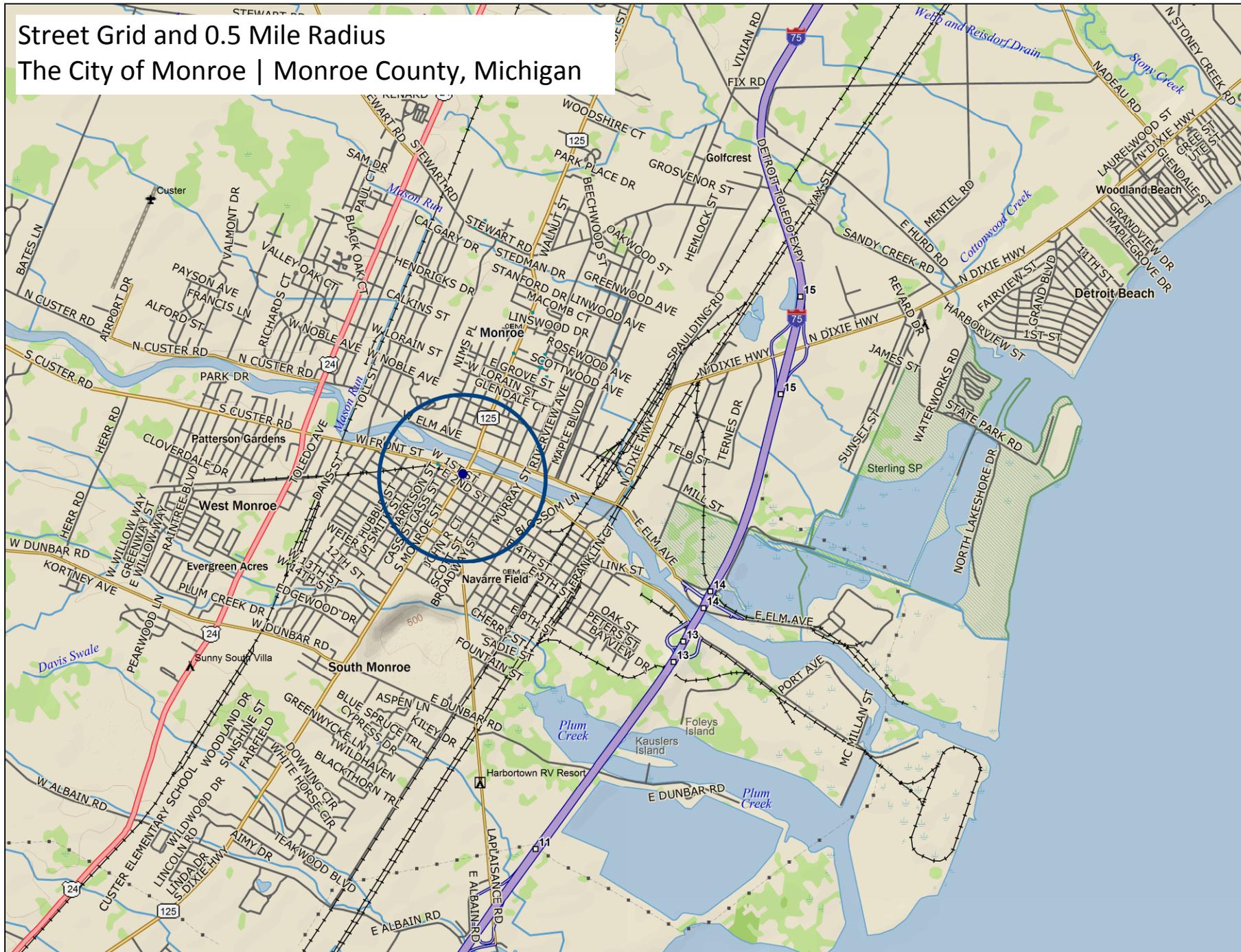
seamless collaborative
urbanism + design + economics

Prepared for:

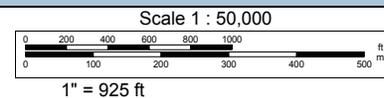


City of Monroe
Monroe, Michigan
Incorporated in 1837

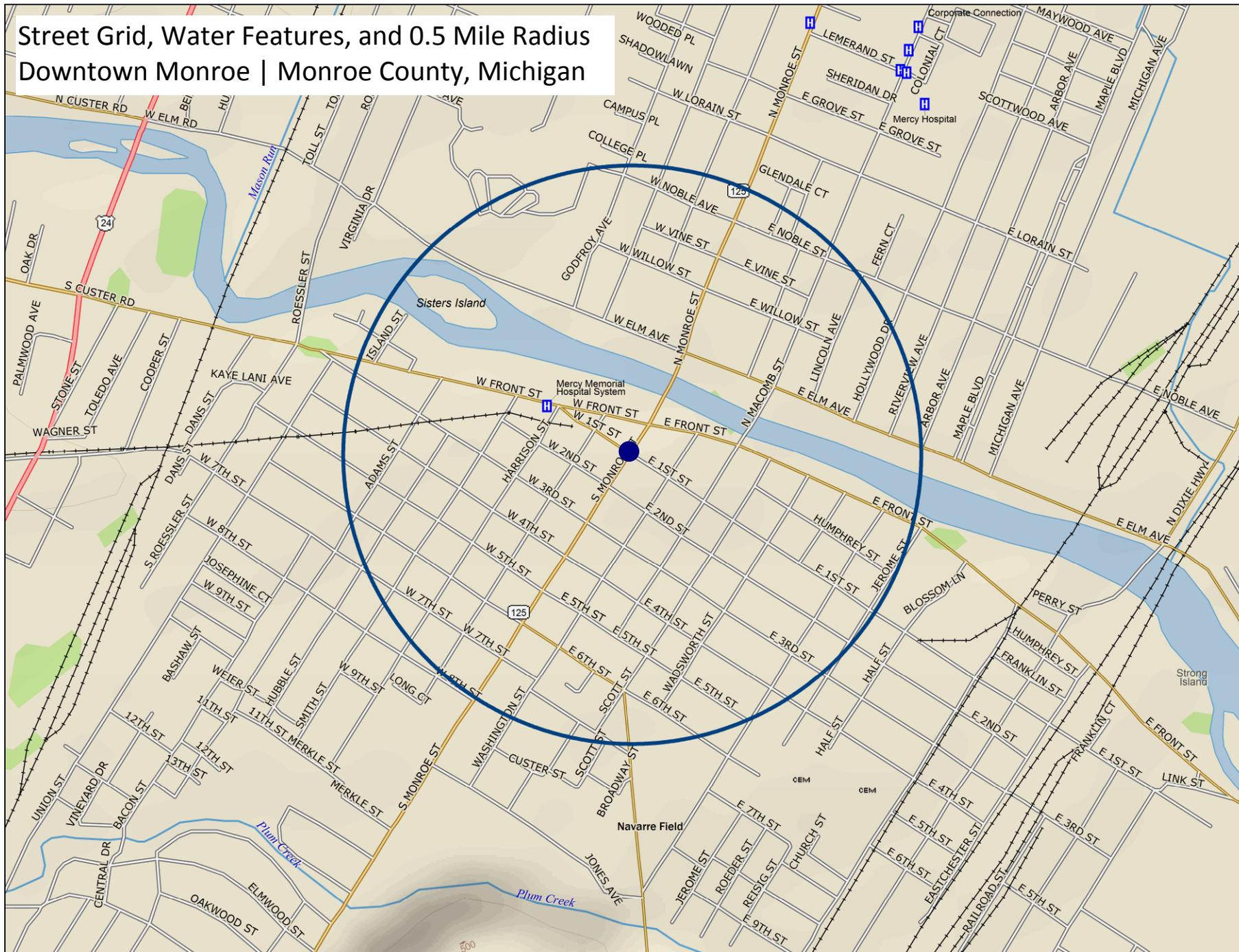
Street Grid and 0.5 Mile Radius The City of Monroe | Monroe County, Michigan



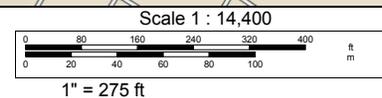
Underlying map provided by Delorme; exhibit prepared by LandUseUSA, 2016 (c) with all rights reserved.



Street Grid, Water Features, and 0.5 Mile Radius Downtown Monroe | Monroe County, Michigan



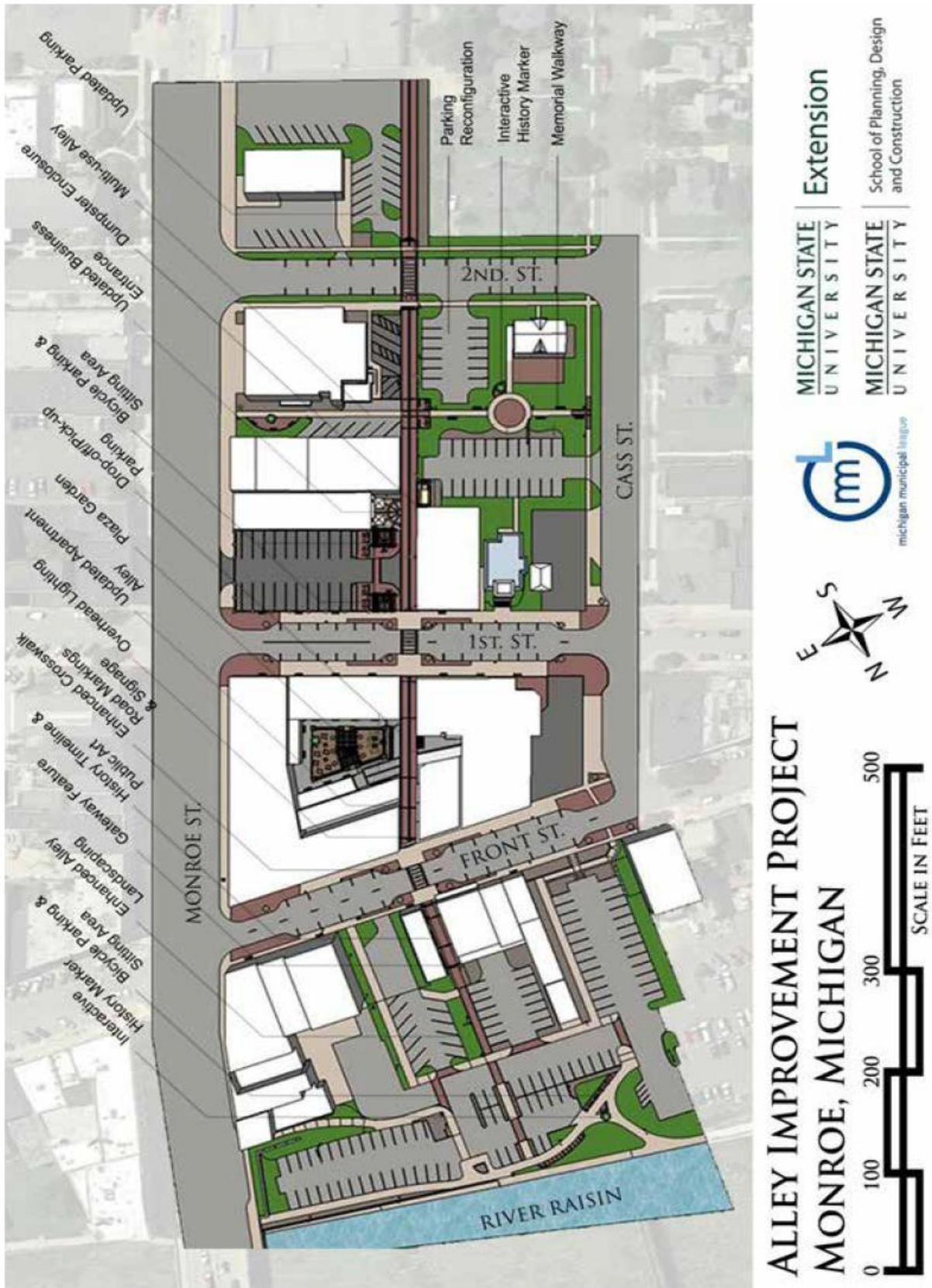
Underlying map provided by Delorme; exhibit prepared by LandUseUSA, 2016 (c) with all rights reserved.



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



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exhibit prepared by LandUseUSA (c) 2016 with all rights reserved.



Demographic Profiles | Population by Age Bracket
 Downtown Monroe 0.5 Mile Radius | 2000 - 2016

| Region or County | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
|-------------------|-----------------------------|----------------------------|-----------------------------|----------------------------|--------------------------------|----------------------------|--------------------------------|--------------------------------|
| Place Name | Monroe 0.5 Mile 2000 Census | Monroe 0.5 Mile 2000 Share | Monroe 0.5 Mile 2010 Census | Monroe 0.5 Mile 2010 Share | Monroe 0.5 Mile 2016 Estimates | Monroe 0.5 Mile 2016 Share | Monroe 0.5 Mile 2000-10 C.A.R. | Monroe 0.5 Mile 2010-16 C.A.R. |
| Population Ages | | | | | | | | |
| 0 to 4 | 348 | 7.6% | 311 | 7.4% | 308 | 7.3% | -1.1% | -0.2% |
| 5 to 14 | 654 | 14.3% | 613 | 14.5% | 585 | 13.9% | -0.6% | -0.8% |
| 15 to 19 | 379 | 8.3% | 298 | 7.0% | 273 | 6.5% | -2.4% | -1.4% |
| 20 to 24 | 332 | 7.3% | 298 | 7.1% | 290 | 6.9% | -1.1% | -0.5% |
| 25 to 34 | 722 | 15.8% | 586 | 13.9% | 595 | 14.1% | -2.1% | 0.2% |
| 35 to 44 | 830 | 18.2% | 573 | 13.6% | 538 | 12.8% | -3.6% | -1.0% |
| 45 to 54 | 541 | 11.9% | 631 | 14.9% | 601 | 14.3% | 1.5% | -0.8% |
| 55 to 64 | 273 | 6.0% | 514 | 12.2% | 569 | 13.5% | 6.5% | 1.7% |
| 65 to 74 | 178 | 3.9% | 205 | 4.9% | 244 | 5.8% | 1.4% | 2.9% |
| 75 to 84 | 213 | 4.7% | 124 | 2.9% | 122 | 2.9% | -5.3% | -0.2% |
| 85+ | <u>93</u> | <u>2.0%</u> | <u>73</u> | <u>1.7%</u> | <u>79</u> | <u>1.9%</u> | -2.4% | 1.3% |
| Sum | 4,563 | 100.0% | 4,225 | 100.0% | 4,205 | 100.0% | -0.8% | -0.1% |
| Total Population | 4,562 | 100.0% | 4,226 | 100.0% | 4,204 | 100.0% | -0.8% | -0.1% |
| Median Age | 33 | . | 35 | . | 36 | . | . | . |
| Per Capita Income | \$18,754 | . | \$23,151 | . | \$23,722 | . | 2.1% | 0.4% |

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 C.A.R. indicates compound annual rate.

Demographic Profiles | Race and Ethnicity
 Downtown Monroe 0.5 Mile Radius | 2000 - 2016

| Region or County | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
|------------------------------|-----------------------------|----------------------------|-----------------------------|----------------------------|--------------------------------|----------------------------|--------------------------------|--------------------------------|
| Place Name | Monroe 0.5 Mile 2000 Census | Monroe 0.5 Mile 2000 Share | Monroe 0.5 Mile 2010 Census | Monroe 0.5 Mile 2010 Share | Monroe 0.5 Mile 2016 Estimates | Monroe 0.5 Mile 2016 Share | Monroe 0.5 Mile 2000-10 C.A.R. | Monroe 0.5 Mile 2010-16 C.A.R. |
| Population by Race | | | | | | | | |
| White, Caucasian | 4,130 | 90.5% | 3,756 | 88.9% | 3,686 | 87.7% | -0.9% | -0.3% |
| Black, African Amer. | 189 | 4.1% | 227 | 5.4% | 251 | 6.0% | 1.8% | 1.7% |
| Amer. Indian, Aleut | 1 | 0.0% | 15 | 0.3% | 16 | 0.4% | 31.1% | 1.1% |
| Asian, Pacific Island. | 81 | 1.8% | 27 | 0.6% | 31 | 0.7% | -10.3% | 2.4% |
| Any Other Race | 73 | 1.6% | 58 | 1.4% | 62 | 1.5% | -2.3% | 1.1% |
| Two or More Races | 89 | 2.0% | 143 | 3.4% | 157 | 3.7% | 4.9% | 1.6% |
| Ethnicity of Any Race | | | | | | | | |
| Hispanic or Latino | 263 | 5.8% | 201 | 4.8% | 214 | 5.1% | -2.7% | 1.0% |
| Not Hispanic, Latino | 4,300 | 94.2% | 4,025 | 95.2% | 3,990 | 94.9% | -0.7% | -0.1% |

Data provided by Experian, powered by Alteryx © 2016. Analysis and exhibit prepared by LandUseUSA © 2017.
 C.A.R. indicates compound annual rate.

Demographic Profiles | Marital Status and Education
 Downtown Monroe 0.5 Mile Radius | 2000 - 2016

| Region or County | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
|-------------------------|-----------------------------|----------------------------|-----------------------------|----------------------------|--------------------------------|----------------------------|--------------------------------|--------------------------------|
| Place Name | Monroe 0.5 Mile 2000 Census | Monroe 0.5 Mile 2000 Share | Monroe 0.5 Mile 2010 Census | Monroe 0.5 Mile 2010 Share | Monroe 0.5 Mile 2016 Estimates | Monroe 0.5 Mile 2016 Share | Monroe 0.5 Mile 2000-10 C.A.R. | Monroe 0.5 Mile 2010-16 C.A.R. |
| Marital Status | | | | | | | | |
| Spouse Present | 1,520 | 42.0% | 1,402 | 42.4% | 1,208 | 36.5% | -0.8% | -2.5% |
| Spouse Absent | 181 | 5.0% | 152 | 4.6% | 156 | 4.7% | -1.7% | 0.4% |
| Divorced | 471 | 13.0% | 510 | 15.4% | 561 | 16.9% | 0.8% | 1.6% |
| Widowed | 219 | 6.0% | 193 | 5.8% | 183 | 5.5% | -1.3% | -0.9% |
| Never Married | <u>1,232</u> | <u>34.0%</u> | <u>1,046</u> | <u>31.7%</u> | <u>1,203</u> | <u>36.3%</u> | -1.6% | 2.4% |
| Summation | 3,623 | 100.0% | 3,303 | 100.0% | 3,311 | 100.0% | -0.9% | 0.0% |
| Pop. Ages 15+ | 3,561 | 100.0% | 3,302 | 100.0% | 3,311 | 100.0% | -0.8% | 0.0% |
| Educ. Attainment | | | | | | | | |
| Grade K - 8 | 141 | 4.9% | 117 | 4.3% | 90 | 3.3% | -1.8% | -4.4% |
| Grade 9 - 11 | 323 | 11.2% | 187 | 6.9% | 203 | 7.4% | -5.3% | 1.3% |
| High School Grad. | 1,045 | 36.1% | 769 | 28.4% | 836 | 30.4% | -3.0% | 1.4% |
| Some College Only | 648 | 22.4% | 766 | 28.3% | 747 | 27.2% | 1.7% | -0.4% |
| Associates Degree | 173 | 6.0% | 250 | 9.2% | 281 | 10.2% | 3.8% | 2.0% |
| Bachelor's Degree | 321 | 11.1% | 342 | 12.6% | 333 | 12.1% | 0.6% | -0.4% |
| Graduate Degree | 209 | 7.2% | 238 | 8.8% | 223 | 8.1% | 1.3% | -1.1% |
| No Schooling | <u>32</u> | <u>1.1%</u> | <u>36</u> | <u>1.3%</u> | <u>36</u> | <u>1.3%</u> | 1.3% | -0.3% |
| Age 25+ Population | 2,892 | 100.0% | 2,706 | 100.0% | 2,749 | 100.0% | -0.7% | 0.3% |

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 C.A.R. indicates compound annual rate.

Demographic Profiles | Labor Force and Employment
 Downtown Monroe 0.5 Mile Radius | 2000 - 2016

| Region or County | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM | 09 SEM |
|------------------------|-----------------------------|----------------------------|-----------------------------|----------------------------|--------------------------------|----------------------------|--------------------------------|--------------------------------|
| Place Name | Monroe 0.5 Mile 2000 Census | Monroe 0.5 Mile 2000 Share | Monroe 0.5 Mile 2010 Census | Monroe 0.5 Mile 2010 Share | Monroe 0.5 Mile 2016 Estimates | Monroe 0.5 Mile 2016 Share | Monroe 0.5 Mile 2000-10 C.A.R. | Monroe 0.5 Mile 2010-16 C.A.R. |
| Employment | | | | | | | | |
| Employed Civilians | 2,116 | 96.6% | 1,822 | 88.1% | 1,796 | 94.4% | -1.5% | -0.2% |
| Unempld. Civilians | 73 | 3.3% | 245 | 11.9% | 105 | 5.5% | 12.9% | -13.2% |
| In Armed Forces | <u>1</u> | <u>0.1%</u> | <u>1</u> | <u>0.1%</u> | <u>1</u> | <u>0.1%</u> | . | . |
| Subtotal | 2,190 | 62.8% | 2,068 | 63.8% | 1,902 | 58.5% | -0.6% | -1.4% |
| Not In Labor Force | <u>1,296</u> | <u>37.2%</u> | <u>1,173</u> | <u>36.2%</u> | <u>1,348</u> | <u>41.5%</u> | -1.0% | 2.3% |
| Total Pop. Ages 16+ | 3,486 | 100.0% | 3,241 | 100.0% | 3,250 | 100.0% | -0.7% | 0.0% |
| | 2000 Census | 2000 Share | 2010 Census | 2010 Share | 2016 Estimates | 2016 Share | 2000-10 C.A.R. | 2010-16 C.A.R. |
| Job Professions | | | | | | | | |
| % Blue Collar | 1,038 | 48.1% | 920 | 50.5% | 923 | 51.4% | -1.2% | 0.1% |
| % White Collar | <u>1,119</u> | <u>51.9%</u> | <u>901</u> | <u>49.5%</u> | <u>873</u> | <u>48.6%</u> | -2.1% | -0.5% |
| Total Professions | 2,157 | 100.0% | 1,822 | 100.0% | 1,796 | 100.0% | -1.7% | -0.2% |

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 C.A.R. indicates compound annual rate.