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Woodward Avenue Corridor Study

A COMMUNITY BASED IMPROVEMENT PROJECT

MARKET ANALYSIS

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PREPARED: JUNE 1995

WOODWARD AVENUE CORRIDOR STUDY
MARKET ANALYSIS

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MARKET ANALYSIS: CHAPTER I

EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

Purpose of the Chapter

The purpose of this Market Analysis study is twofold. First, it is designed to serve the Woodward Avenue Corridor Study by examining some of the key trends and forecasts which are likely to shape the regional, county and local markets in the next five to fifteen years.

Second, it is envisioned that this document, in its scope and detail, will serve as a key database and reference to those charged with post-study implementation efforts.

The report is divided into ten sections. This Executive Summary embraces the key findings and observations contained in the following nine detailed sections, which span a variety of topics. The second and third sections explore recent trends and forecasts with respect to population, income and buying power. Sections IV and V offer an analysis of retail activity and a survey of vacant retail facilities.

Office building activity is covered in Section VI. Section VII offers a refinement of traffic activity, which was previously covered in the *Background Report*. A detailed analysis of Permit Authorized Construction activity is presented in Section VIII.

Finally, Sections IX and X set forth the findings of the Merchants Survey and the Users Survey, respectively. Since an analysis of the Users Survey was already included in the *Background Report*, the narrative in this section is kept to a minimum in order to avoid duplication. Nevertheless, the tables offer considerable detailed data with respect to the open-end questions and are included as a supplement to the Users Survey data base. Also presented for the first time in this section are the results of a residency survey based on license plate tabulations.

BACKGROUND

The Woodward Avenue Corridor Study Area, defined by the span from 8 Mile to Quarton Road, or Big Beaver Road, is centrally located in the Southeast Michigan region. It is one of the highest volume surface arteries in the area. It bisects, or abuts the six participating cities of Berkley, Birmingham, Ferndale, Huntington Woods, Pleasant Ridge and Royal Oak and serves as home to a host of retail, service, institutional, and recreational activities. These activities are supported by residents of the nearby neighborhoods, as well as, the surrounding counties and their component cities, which form the Metropolitan Detroit area. In general, the corridor serves four market groups: neighborhood, regional, daily commuter traffic, and tourists.

The Users Survey, conducted, in part, by Lawrence Technological University in December 1993, indicated that nearly 67% of the respondents were residents of the nearby communities. Specifically, they lived within a five-mile radius of Woodward Avenue at Catalpa (11 1/2 mile). This area basically embraces all of Southeast Oakland County, as well as, portions of Detroit and Macomb County.

A subsequent License Plate Survey, although varying in some aspects, essentially confirmed and reinforced this relationship between Woodward Avenue and the surrounding neighborhoods and communities. This relationship also influenced the subsequent investigations by focusing on the population, income and retail sales characteristics of these cities.

POPULATION TRENDS AND FORECASTS

The recent history (1970-1990) of population changes in the 14 communities that comprise the Southeast Oakland County area, indicates general and steady decline with a few notable exceptions. These trends appear to be in line with national and state population changes in mature built-up suburban cities.

Similarly, the Southeast Michigan Council of Governments' (SEMCOG) forecasts indicate that these trends are likely to continue through the year 2010. However, three points should be made regarding these and other SEMCOG forecasts. First, any small area forecasts are subject to a wider margin of error than those embracing a larger area such as a region or county. Second, within the last few years many cities in Southeast Oakland County have experienced considerable development and in-migration activity. Finally, these forecasts are several years old and are scheduled to be updated in late 1995. It is expected that these new projections will reflect the recent developments and extend the forecasts through the year 2020. These factors should be taken into account, especially when reviewing the sections dealing with population and income and buying power.

In 1990 the combined population of the six cities was 139,002. By 2010 this number is expected to decline by 9.7%, to 125,492. All cities are expected to experience declines. In 1990 the combined population of the 14 cities was 403,660, or 37% of the County's total population. By the year 2010 this number is expected to increase slightly to 404,550 and represent approximately 32% of the County's total. Of the 14 cities, twelve are expected to experience population declines. Only the cities of Southfield and Troy are expected to gain population. Again, these predictions seem consistent with the existing and potential development of the respective cities, as well as, trends in household size.

The same forecasts indicate that the total number of households in the 14 cities are likely to remain relatively stable in most communities and expand slightly in the balance of the cities. In total, the combined number of households is expected to increase from 161,661 in 1990 to 183,548 in 2010, an increase of 13.5%. However, only four of the cities are expected to experience significant increases, namely: Birmingham, Lathrup Village, Southfield and Troy. The remaining ten cities are expected to see growth in households range from less than 1% to 5.5%. However, some of these forecasts warrant close scrutiny and possible upward revision in light of the recent developments and in-migration of younger population groups, especially in Royal Oak and Ferndale. This recent phenomena may also result in revisions to the income and buying power forecasts for some of these cities.

The one dominant population characteristic shared by all cities, as well as, the County and region is the aging of the "baby-boom" population. This post World War II generation will swell the ranks of 45-64 year olds over the next 15 years. In doing so its influence is forecast to be reflected in the number of persons per household, which is uniformly expected to decline, while median age is expected to increase in all cities. As noted, this is consistent with national and state trends. Thus, the personal and family needs and wants of this pre-retirement age group will play a major role in the regional, County and local area markets over the next fifteen years. By the year 2020 this group will significantly increase the 55-75 age group. Anticipating and planning for the needs (i.e. housing and health care, etc.) of this group would appear to be of paramount importance.

INCOME AND BUYING POWER

Also of particular significance, are SEMCOG's forecasts which indicate that the percentage of households in higher income groups will generally decline, while the households falling in lower income groups are expected to grow in number and relative share of the total. Contributing to these forecasts are factors such as decline in family and household size, the general aging of the population, and migration patterns.

It should be remembered that these forecasts, to a large extent, reflect a continuation of a pattern which has been evident for quite some time and characteristic of mature, fully developed, suburban communities. Nevertheless, these trends are of primary importance when viewing the redevelopment potential of Woodward Avenue, particularly with respect to the linkage with and market support of the business establishments on Woodward by the nearby neighborhoods and communities.

Oakland County ranks among the highest buying power communities in the nation. However, the buying power of the 14 Southeast Oakland County cities can best be described as diverse. Many of the cities boast per capita income levels which exceed the 1990 County average of $21,125. Conversely, six cities have average per capita incomes below $16,000. Thus, in general, the objectives would appear to be twofold: 1) draw upon this affluence while, 2) continuing to support and serve the diverse neighboring communities.

RETAIL TRADE

In general, it appears that retail activity, as measured by number of establishments in the six participating communities, has declined over the last 15 years. Further decline, perhaps at a diminishing rate, would appear to be a likely short range (3-5 years) scenario. This scenario is based on a continuation of changes in retail marketing, further suburban growth and development of retail facilities which expand consumer choice.

Likewise, retail sales for these six cities are likely to track any further reduction in the number of establishments. If such reduction results in non retail (i.e. service, etc.) activity occupying previous retail activity, the impact on retail sales on the Corridor might be particularly acute.

These observations also appear to generally apply to the eight nearby cities which share many of the historical characteristics and whose recent retail activity parallels that of the six participating communities. There are, however, exceptions such as Troy, Southfield and, to a lesser extent, Madison Heights which are likely to continue to lead the area in retail activity into the next century.

To the extent that many of the forces that have produced the recent changes are beyond the control of local officials and are likely to continue, they need to be acknowledged in the strategic outlook for Woodward Avenue. The relative role of retail activity in these communities, particularly on Woodward Avenue, has been and is likely to continue to shift, especially with respect to the service sector, yielding a greater mix of activities. In addition, the mix of retail activity is also likely to change. In recent years it appears that smaller square footage facilities have been replaced by larger "footprint" stores. Business expansions, which have absorbed adjacent facilities, have also been evident throughout the corridor. Both of these occurrences have, in many cases, been accompanied by increased on-site parking development, thus fulfilling a primary need of the Corridor.

Also, the role of Woodward Avenue and its retail establishments varies widely. In some cases it forms part of a downtown (Ferndale). In other cases it bisects the city (Pleasant Ridge, Royal Oak, and Birmingham). In still others it forms a boundary (Berkley and Huntington Woods).

The retail activities along the corridor vary somewhat in their dependence and orientation to the nearby neighborhoods. This is, in part, attributed to community demographics, particularly with respect to purchasing power. Retail offerings also appear to vary by the degree of dependence on broader market areas. This appears to be particularly true with respect to the north Woodward establishments, many of which appear to draw customers from a broader market area.

In light of the forecasts, which tend to indicate that the number of households in the six communities are likely to remain nearly constant and be characterized by a relative increase in households falling into the lower income brackets, the ability to reach and sell to the broader regional market appears to be a strategic option worthy of further detailed investigation and pursuit.

RETAIL VACANCIES

In order to monitor marketplace activity on the Woodward Corridor, three retail vacancy surveys of ground-level stores were conducted between December 1993 and December, 1994. Some 70 retail establishments were identified as vacant in the most recent survey. Of this total, 21 units were classified as vacant in all three surveys, which spanned one year. The Study's data base indicates that there are a total of approximately 650 "ground level" establishments. Thus, the 70 vacancies represent about 11% of the total. The long-term vacancies (21) represent nearly 30% of the December 1994 total and 3.3% of the total facilities comprising the database.

Although the relative number of vacancies may not represent a cause for alarm, they merit concern for at least three reasons. First, although business turnover and resultant vacancies are to be expected, the overall trend of such activity appears to have increased substantially over the last 12-15 months. A continuation of this trend could have significant negative effects on the economic base and vitality of the corridor. Second, the vacancies appear to be increasing in a non-uniform pattern. Some 39 of the 70 vacancies were located in the northern part of the Corridor between Twelve Mile and Quarton Roads. Third, long-term vacancies can be especially troublesome factors to the neighboring merchants, neighborhood, as well as, the property owner. Although these long-term vacancies are generally scattered throughout the Study Area, their impact on the above noted vested interests and the general appearance of the Avenue are, nevertheless, cause for concern.

OFFICE BUILDINGS

Although the Woodward Avenue Corridor is probably not destined, due to a variety of factors, to become a major office market/center such as Southfield and Troy, it has, nevertheless, recently demonstrated its desirability as an office location. Its central location, ease of access, especially at the nodes at I-696 and Square Lake Road, make it likely that the Woodward Avenue Study Area will continue to experience selective and "niche" office building development. Other factors which will likely contribute to this potential development include expected growth in the Health Care and service (especially professional and business support services) sectors. Also, existing office and hospital developments are likely to attract and support additional development.

However, any consideration of office building construction within the Woodward study area in the next 3-5 years must take into account the relatively high vacancy rates in the nearby sub-markets of Southfield and Troy, as well as, the vacancy rates of existing facilities within the study area, especially the Ten to Eleven Mile Road area. In addition, the limited availability of land, its cost, and neighboring residential development are also limiting factors. Nevertheless, the recent office development within the study area bears testimony to the area's potential for such development.

Although the study area is generally regarded as a retail shopping corridor, it appears that approximately 63% (569 street level/900 total) of business entities can be classified as service providers, with the medical and legal sub-groups holding dominant shares. This is particularly significant in light of two factors. First, the study area, as noted in the "Office Building" section, contains relatively few office buildings. Second, the recent office building development on Woodward Avenue tends to suggest that service business entities are likely to claim an increasing share of total entities on Woodward Avenue in the foreseeable future. This may be especially true with respect to medical services, which are likely expand in response to the forecasted increase in median household age and older age groups in the southeast Oakland County communities.

PERMIT AUTHORIZED CONSTRUCTION ACTIVITY

In order to get another perspective of the market dynamics at work on the Woodward Corridor, permit authorized construction activity was studied in detail. Initially, data was gathered for each of the six cities in the Study Area. Specifically, six construction type categories were selected and data gathered for the last fifteen years on a city-wide basis, utilizing U.S. Bureau of the Census data.

Subsequently, attempts were made to refine the data to include activity on Woodward Avenue frontage. This effort involved utilizing local government records. The results are uneven due to the various forms of recordkeeping which exist at the local level. This precluded the generation of an equally detailed data subset for the Woodward Avenue Corridor Study Area. Available data were used, along with the Study's photo file and anecdotal information gathered from local officials and staff, to develop the analysis.

Although the six cities and Woodward Avenue can generally be characterized as fully developed, the data suggests that both the cities and the Corridor experienced a fair amount of change over the past 10 to 15 years. During this period the total estimated cost/value of permits issued, in all categories (except demolitions) studied, amounted to over $306 million, unadjusted for inflation.

Of this total *Alterations, Additions and Conversions* accounted for nearly $111 million, or 36% of the total. Once again this appears to be consistent with the degree of development of these cities. It also appears that Woodward Avenue was a major area of activity for this category. Awnings, outdoor signage, interior renovations and other interior work such as plumbing, electrical, heating, air-conditioning and code-violation corrections are representative of the details of this investment/expenditure on Woodward Avenue. Although no data was readily available, it seems reasonable to indicate that some significant portion of this activity (and investment) resulted from business turnovers, new business starts and facility upgrades.

The category of *Housing* accounted for a combined total of approximately $99 million, or 32% of the total. As might be expected, little, if any, of this activity took place on Woodward Avenue, with the exception of the Woodward/Hunter area in Birmingham.

With respect to *Office Buildings*, $71 million (23%) of new investment was recorded in the six cities. This category was dominated by the cities of Birmingham and Royal Oak and, to a lesser extent, Berkley. However, the Woodward Avenue Corridor Study Area does not appear to have been a major center of activity. Of the 75 buildings listed over the past fifteen years, fewer than ten appear to have been located on Woodward Avenue. This observation also includes any office development in downtown Birmingham situated between Woodward Avenue and Hunter Boulevard. Anecdotal observations indicate that this area has been the site of considerable activity, including office construction during the past fifteen years.

Although the new office buildings constructed on Woodward Avenue in the past 15 years are relatively few and modest in size (when compared to office building activity in the Troy and Southfield submarkets), they nevertheless represent a significant impact on the respective communities and the Corridor. Of particular note are the First of America building in Birmingham and the Northpointe Medical Center building in Berkley.

With respect to new *Retail Building* construction, the six communities accounted for only $25 million (85 buildings) over the last 15 years. Again, fewer than 10 new buildings and/or retail strip malls were attributed to Woodward Avenue during this span of time. However, the impact of these new facilities contributed significantly to changing the "face" of Woodward Avenue in certain areas of the Corridor. Worthy of special mention are the Westborn Market and the relatively new strip mall developments in Berkley. The Ferndale Plaza (Ferndale) and Piety Hill complex (Birmingham) also merit special mention. Finally, it should be noted that over the years many larger "footprint" retail facilities have replaced smaller ones, especially on the east side of Woodward Avenue in Royal Oak. This has also changed the density and look of the Avenue. Generally, this process of retail redevelopment has also been accompanied by additional on-site parking.

The categories of *Demolitions* and *Parking* were included in this investigation, in part, due to the generally accepted "parking problem" that exists in the Study Area. However, the data yielded less than five entries (of a total 74) on Woodward Avenue. Similarly, the data did not contain any references to demolitions being undertaken for the purpose of providing parking facilities. Nevertheless, a review of the photo files and anecdotal observations tends to indicate that such activity has taken place and has also changed the density and appearance of Woodward Avenue over the past decade.

In summary, the Woodward Avenue Corridor Study Area has been a center of investment activity, albeit limited and varying by category, over the past 10-15 years. This development and investment activity appears to have been justified and sustained by location and market factors. No evidence has been revealed that would indicate that these factors will not remain favorable for the foreseeable future.

TRAFFIC

Although traffic and transportation were covered in the *Background Report*, it was deemed desirable to further develop this topic. In addition to the previously reported total traffic counts by mile road intersections, it was felt that a detailed analysis of the north/south traffic, particularly for the peak morning and evening rush hours, would yield valuable market data.

Woodward Avenue traffic volume data, as expressed by average daily trips (ADTs) and compiled by SEMCOG, indicates varying volumes by mile road segment. Between Eight Mile and Quarton Roads, ADTs vary from a low of 38,332 (between Eight Mile and Nine Mile) to a high of 63,605 (between Twelve Mile and Coolidge Road) based on estimated 1992 data.

According to SEMCOG's forecasts ADTs are expected to increase in all segments of the study area through the year 2015. Rates of growth are expected to vary from a low of 2.3% (Ten Mile-Eleven Mile) to a high of 28% (Haynes Road-Quarton Road).

Historically, Woodward Avenue served as a major carrier of daily commuter traffic from Oakland County communities to the office centers in downtown Detroit and the New Center Area. Traffic patterns were largely characterized by morning rush hour traffic headed south and comparatively lighter traffic headed north, with the pattern being reversed during the evening rush hours.

However, this pattern has shifted in recent years due, in part, to expanded office development in the north Woodward and neighboring areas. With the completion of I-696 in the early 1990s, access to Woodward Avenue has been greatly enhanced for both east and west side residents. The result has been a near equalizing of north and southbound commuter traffic during the rush hours.

From a marketing perspective, the mix of merchants on the east side of Woodward Avenue, serving northbound traffic, should take into account this shift in commuting pattern, as well as, the growth in traffic volume anticipated by the SEMCOG forecasts.

MERCHANTS SURVEY

Nearly 35% (37/108) of the merchants responding to this Survey indicated that they have been located on Woodward Avenue over twenty years. In fact, 58% (63/108) of the merchants indicated that they have been located on Woodward Avenue for more than ten years. This suggests that Woodward Avenue has afforded these merchants a stable and profitable location.

"Well-known location," "easy to get to," "great amount of traffic," "good exposure," "centrally located" were the themes repeatedly cited as positive aspects by Woodward Avenue merchants when asked for general comments.

Conversely, "limited parking," and the "high speed of traffic" were most frequently offered as key shortcomings of Woodward Avenue as a retail location. Also, in the Birmingham area the confusion that arises from the Woodward Avenue-Hunter Boulevard designations was cited as a primary concern.

One of the most noteworthy comments from a merchant stated: "The Woodward Corridor is without question the greatest advertising any restaurant would want."

USERS SURVEY

The *Users Survey* and companion *License Plate Survey* generated two major findings with respect to residency. First, it appears that the Woodward Avenue merchants are strongly tied to the residents of the nearby neighborhoods and cities. The *Users Survey* indicates that approximately two-thirds of the respondents resided within a five-mile radius of Woodward at Catalpa. The *License Plate Survey* tended to reinforce this relationship, albeit at a slightly lower percentage.

Second, both surveys clearly indicate that the Woodward Corridor draws shoppers and visitors from throughout the Southeast Michigan region, as well as, out state and Canada. No doubt this broad regional representation is made possible by a variety of factors including Woodward's central location, easy access, ability to accommodate large traffic volumes and strong location identity among the general populace. All of these factors are generally regarded as major assets for successful retail development.

In terms of what businesses brought the shoppers and visitors to Woodward on the survey dates, the broad category of "entertainment," including restaurants and bars, accounted for more than 35% of the total responses. This group probably spans all four market segments previously identified as: neighborhood, regional, commuter and tourist.

The combination of drug stores, grocery, clothing, bank and service represented nearly 33%. This group appears to be more directly related to the neighborhood and commuter market groups.

Consumer preferences for new types of shops or services appear to call for more of the offerings which they presently frequent, namely: restaurants, entertainment and clothing. As noted, these first two categories appear to be well represented and supported and are likely to continue to represent growth opportunities for both existing and new establishments. However, as recent history indicates, such expansion and new development appears to be meeting with ever increasing community concern and resistance. Limited site sizes often do not afford sufficient on-site parking, and waivers are often denied in deference to nearby neighborhood concerns.

With respect to the expressed preference for more clothing and, to some degree, related "department stores" and "malls," it appears from the "Retail" chapter that the numbers of such establishments have declined over the last 15 years. The last department store on the Corridor was J.C. Penney, which vacated its Northwood Shopping Center location several years ago.

Although it is true that there are relatively few general clothing stores on Woodward, the Corridor is dotted with specialty clothing retail shops such as bridal salons, tuxedo rental, uniform and maternity shops. In recent years resale clothing shops for women and children have appeared on the Corridor. Also, discount and general retail clothing stores are well represented throughout the area's malls and shopping centers. Thus, the limited number of Woodward Avenue clothing stores may be a correct expression of this sector's potential given the nature of the sector and available options throughout the area.

CONCLUSION

This summary will be presented in two parts: 1) Summary of Major Findings, and 2) Summary of Conclusions and Recommendations.

It should be noted that no attempt has been made to select or recommend particular business types, except in the most general fashion, in deference to the complex and varying roles Woodward Avenue plays in the six cities, and the individual visions and collective market forces which have and will continue to play a major role in the economic life of the Woodward Avenue Corridor Study Area.

Also, these findings and recommendations should be regarded as preliminary and non-conclusive, in part, due to the limited scope of this study, which does not embrace key property characteristics such as ownership and value data. It is recommended that future studies embrace these factors, as well as, seek input from property owners, realtors and builders/developers.

SUMMARY OF MAJOR FINDINGS

Residency

- Based on the Users Survey, approximately 2/3 of the respondents live within a five mile radius of Woodward Avenue at Catalpa (11½ mile). The balance of shoppers were from throughout the Detroit Metro Region, out state and Canada.

- The License Plate Survey, utilizing a larger sample, basically confirmed the residency findings of the Users Survey, but with a slightly lower local area (62%) representation.

Population

- In 1990 the combined population of the six cities was 139,002. According to SEMCOG's forecasts, this number is expected to decline by 9.7%, to 125,492, with all cities expected to experience declines.

- The combined population of all 14 cities is expected to remain stable at approximately 405,000. However, 11 of the cities will experience population losses - only Lathrup Village, Southfield and Troy will gain population.

- Southeast Oakland County's share of the County's population is expected to decline from 37% in 1990 to 32% in 2010, primarily as a result of population growth elsewhere in the County.

- In 1990 Oakland County had 417,753 households. By 2010 this number is expected to increase to 544,589, an increase of 126,836 or 30.4%.

- The combined number of households in the 14 cities is expected to increase from 161,661 in 1990 to 183,548 in 2010. The growth will be concentrated in Birmingham, Lathrup Village, Southfield and Troy.

- Between 1990 and 2010 Oakland County households with children (0-17) are forecast to increase from 163,329 to 170,051, an increase of 6,722 or 4.1%.

- Consistent with national and regional forecasts for mature suburban cities, SEMCOG's forecasts indicate:

    - In Southeast Oakland County between 1990 and 2010, all cities (except Troy) are expected to experience absolute and relative declines in households with children.

    - Persons per household will decline in all 14 cities through 2010.

- Median Age will increase in all 14 cities by 2010 - with this indicator topping 40 years in 5 cities.

- The percent of households in higher income groups will generally decline, while the share of lower income households is expected to increase by 2010. Thus, continuing the trend evident between 1980 and 1990.

- The single dominant factor that drives the population and household forecasts is the aging of the "baby-boom" generation - those born between 1945-1965.

Income and Buying Power

- Oakland County ranks among the highest buying power communities in the nation.

- Oakland County has by far the highest level of personal income per capita ($21,125) in Michigan.

- In looking at households with Effective Buying Incomes (EBIs), or after-tax incomes, of $50,000 and above, the Detroit Metro area ranks 4th in the country with nearly 593,000 households in this group.

- When households with EBIs of $150,000 and above are targeted, the Detroit Metro market has nearly 28,000 such households for a 12th place national ranking.

Retail

- Retail activity in the six participating cities, as measured by number of establishments, declined by 25.8% between 1977-1992 and is likely to continue to do so, but at a slower rate. This change and forecast are generally reflective of trends of mature suburban communities.

- The number of retail establishments in the six cities declined (1977-1992) for all Standard Industrial Classification categories, except the Eating & Drinking group.

- Retail activity, as measured by sales, in the six cities appears not to have kept pace with inflation between 1977-1992.

- Retail activity, as measured by establishments, in the 14-city Southeast Oakland County area decreased by 613 establishments, or 15.5%, between 1977 and 1992, again, reflecting national trends.

- Retail sales for the 14 cities accounted for 56.4% of the 1992 Oakland County total.

- Southeast Oakland County contains 42 retail centers ranging from regional malls of one million square feet to neighborhood units of 30,000 sq. ft. The area also embraces four downtowns and numerous street-strip retail developments.

- Many businesses are independently owned, single-location establishments.

- Smaller footprint facilities have been replaced by larger retail facilities - generally generating additional on-site parking.

Office Buildings

- Oakland County communities account for approximately 67% of the Metro Detroit office market inventory. Further, Oakland County dominates the suburban office building market.

- Although beyond the boundary of the Study Area, the Birmingham/Bloomfield office sub-market has seen considerable activity in recent years and represents the prestige office sub-market of the region.

- The Woodward Avenue Corridor Study Area is not considered a major office building sub-market; nevertheless, it has recently been the site of new office building activity which may be an indicator of further potential for such development.

- Between 1979 and 1993, service sector employment, lead by professional and business services, has grown from 23.2% to 36.4% of Oakland County's total private sector employment and is expected to continue to grow for the foreseeable future. This growth is likely to generate continued demand for office space.

- There has been a shift in employment over the 1990s away from retail trade and toward services and motor vehicle manufacturing. This is a departure from the trend of the 1980s, when the manufacturing sector lost ground to the service sector, and trade maintained its share.

- Over the 1990s, Total Private Nonfarm Employment in Oakland County grew 9.9%, twice as fast as the state and nearly three times as fast as the nation.

Traffic Volume

- In recent years the pattern of rush-hour traffic on Woodward Avenue has shifted, yielding a near balance of north and southbound traffic volume in both morning and afternoon peak periods.

Business Inventory

- The Study Area contains approximately 650 ground-level businesses. When multi-tenanted office building businesses are added, the total estimated number of business entities is approximately 900.

- Retail establishments account for approximately 37%, while personal, professional and financial service providers represent approximately 63% of the 900 total.

- Within the Retail sector, fast food and sit-down restaurants account for 27.5% (91/331) of the total.

Permit Authorized Construction

- Between 1980 and 1994 the six cities accounted for approximately $306 million (unadjusted for inflation) in six major Permit Authorized Construction categories.

- Due primarily to the nature and density of its existing development, Woodward Avenue accounted for a relatively small share of this activity, especially in the housing, retail and office building categories.

- Not surprisingly, the greatest amount of Permit Authorized Construction activity on Woodward Avenue appears to have been in the category of "Alternations, Additions and Conversions," probably related to turnovers, new business starts and facility upgrades.

- Although limited in number, business expansions have absorbed and occupied adjacent facilities and are likely to continue to represent a business growth option for Corridor merchants.

Retail Vacancies

- Between December 1993 and December 1994, the number of ground-level retail vacancies appears to have increased.

- Vacancies were not uniformly distributed, but rather appear to be concentrated in the north Woodward area.

- Of the 70 vacancies identified in December 1994, 21 represent long-term vacancies of at least 12 months duration.

Merchants Survey

- "Well-known location," "easy to get to," "great amount of traffic," "good exposure," "centrally located" were the themes repeatedly cited as positive aspects by merchants when asked for general comments. Conversely, "limited parking," and the "high speed traffic" were most frequently offered as key shortcomings of Woodward Avenue as a retail location.

- Nearly 35% (37/108) of the merchants responding indicated that they have been located on Woodward Avenue over twenty years. In fact, 58% (63/108) of the merchants indicated that they have been located on Woodward Avenue for more than ten years.

Users Survey

- Consumer preferences for new types of shops or services appear to call for more of the offerings which they presently frequent, namely: restaurants, entertainment and clothing.

- Respondents would like to see more stores on Woodward. A popular wish was for more department stores or malls (19 and 7 responses were recorded respectively). Among other retail establishments mentioned were: clothing stores, sporting goods and book stores. While new restaurants appeared to be a popular recommendation for new businesses, there may be further opportunity for clothing stores, entertainment and clubs.

- Age was found to affect both location of parking, and convenience of parking in cross tabulations. Businesses who hope to increase their share of middle-aged consumers should review their parking situation; poor parking locations and inconvenience may motivate shoppers to go elsewhere.

Summary of Conclusions & Recommendations

- Any strategic vision for the Study Area should take into account the varying roles played by Woodward Avenue in the six cities.

- The mix of activities should be viewed as an asset of economic diversification. It should be acknowledged, accommodated and promoted.

- The mix of business offerings is ever-changing in response to market conditions.

- Viewed as a whole, the 900 business entities are generally reliant on and serve four market groups, namely: neighborhood, regional, commuter traffic and tourists.

- The importance of each of these market groups appears to vary by business type and, to some degree, location on the corridor.

- A continuation of recent trends in the Retail sector are likely to result in:

  - further but diminished reduction in the number of establishments.
  - larger "footprint stores."
  - specialty merchandise (niche) "one-of-a-kind" stores with broad regional market bases.
  - increased marketing to the higher income groups in Oakland County and the region.
  - increased activity in restaurants and entertainment.

- In response to continued growth in the service sector, especially business and health services, Woodward Avenue may become an increasingly desirable location for office development.

- The mix of retail and service businesses will probably continue to shift toward the service sector.

- The changing demographics will likely impact all businesses, but especially those that are most closely linked to the nearby neighborhoods for support.

- Similarly, although the number of households in Southeast Oakland County are not expected to increase significantly, the modest increase should, nevertheless, be taken into account.

- Merchants and other businesses should be mindful of the aging of the population and decline in household size and adjust service and product mix accordingly.

- The aging of the "baby-boom" population will probably generate greater demand for housing - which might be accommodated on the Corridor, in order to take advantage of public transit service.

- The aging of the "baby-boom" population will also likely impact the demand for recreation-leisure, health and related household support services over the next 15-25 years.

- Merchants should also bear in mind the correlation with an aging clientele and parking problems - both real and perceived.

- Marketing the assets will require a coalition or joint venture approach, involving private, public and citizen interests.

- Market the assets:

    - central location within Metro Area.
    - "Main Street" to one of the most affluent County's in U.S.
    - high traffic volume, 65,000 per day, which is expected to increase.
    - high location identity among residents, commuters and tourists.
    - maximize boulevard features.
    - long-term business establishments.
    - leverage the recent population changes and development activities in Royal Oak and Ferndale.
    - 162,000 Households, or 400,000 people with substantial buying power within a five mile radius.
    - the Detroit Metro market ranks 4th in the U.S. as measured by households with EBIs of $50,000 or more.

- Minimize liabilities through joint venture actions and aggressive maintenance through:

    - parking.
    - appearance of streetscape.
    - appearance of stores, both interior and exterior.

- The affluence of the Oakland County market, as well as, other areas of the region should play a major role in marketing efforts of existing and prospective Woodward Avenue businesses.

- Woodward Avenue is situated in the midst of Oakland County's most densely populated residential communities.

- The 14-city southeast Oakland County area contains approximately 162,000 households, or 39% of the County total.

- Although generally less affluent than many other areas of the County, the nearby neighborhoods represent a major and diverse source of customers, which should be maintained.

- The interdependence between the Avenue's businesses and nearby neighborhoods, from both economic and social perspectives, must be a foremost factor in any strategic effort, which seeks to encourage and accommodate market changes for the betterment of all.

MARKET ANALYSIS: CHAPTER II

POPULATION TRENDS & FORCASTS

POPULATION TRENDS AND FORECASTS

Purpose of the Chapter

The purpose of this section is to provide a summary of recent population trends and forecasts to the year 2010 for the Southeast Michigan Region, Oakland County, as well as, the six participating communities and the eight nearby cities that form Southeast Oakland County.

Specifically, total population, median age, persons per household and changes in age groups will be reviewed in order to develop the context for the Woodward Avenue Corridor Study.

THE REGION

Between 1980 and 1990 the Southeast Michigan Region's total population decreased by 1.6% to a level of approximately 4.7 million. However, this recent trend is expected to reverse through the year 2010 when total population is expected to reach nearly 5 million people, according to SEMCOG's Regional Development Forecast.

Over the next 15 years the Region's median age is expected to increase some 8.5% to 33.5 years, while persons per household is expected to decline by 10.4% to 2.36 per unit. Also, only two age groups (0 to 4 years and 45 to 64 years) are expected to increase over the next 15 years.

OAKLAND COUNTY

One of the major reasons for forecasting a population increase in the region over the next 15 years is the expected growth in Oakland County. Between 1980 and 1990, Oakland's population grew by 7.4%, to a level of nearly 1.1 million. By the year 2010, the County's population is forecast to increase by 15% to 1.273 million.

The characteristics of this population are also expected to mirror national and regional trends. Specifically, median age is expected to climb to 34.05 years, an increase of 7%.

The average household size is similarly expected to decline by nearly 11%, to 2.32 persons per household. Like the regional profile, only two age groups (0 to 4 and 45 to 64) are expected to show increases by the year 2010.

SOUTHEAST OAKLAND COUNTY

Between 1970 and 1990 all six participating communities experienced population loss. In 1970 the combined population of these communities was 177,662. By 1990 the total declined to 136,645, a decline of some 23%.

Between 1990 and 2010 the population of each of the six participating cities is expected to decline by varying rates, which range from a low of 6.9% in Birmingham to a high of 12.1% in Ferndale.

Median age is expected to increase in all cities, ranging from a low of 36.49 years in Berkley to a high of 41.44 years in Huntington Woods. Also mirroring regional and county forecasts, is the expectation that all six communities will experience population declines in all age groups except the 45-64 group.

In addition to the six participating communities, Southeast Oakland County embraces several other communities which are part of the market area shown on Map 1. These primary communities are listed below.

- Beverly Hills
- Clawson
- Hazel Park
- Lathrup Village
- Madison Heights
- Oak Park
- Southfield
- Troy

When one looks at the broader Southeast Oakland County area of 14 cities listed in Table 1, it is notable that only two gained population between 1970 and 1990, namely, Southfield and Troy. Overall, the combined populations of these 14 communities declined by 24,623 or 5.8% over the twenty-year period, despite Troy's explosive growth (33,465 or 85%) during this span.

The above referenced forecasts for population, median age, population by age group and household size are also generally expected for the eight nearby cities, with some exceptions. Notably the cities of Lathrup Village, Southfield and Troy are expected to increase in population by 2010. However, all three are expected to experience declines in the number of persons per household, while median age increases. Again, the only age group expected to increase over the next 15 years is the 45-64 category.

CONCLUSION

In summary, the one dominant population characteristic shared by all cities, the County and region is the aging of the "baby-boom" population. This post World War II generation will swell the ranks of 45-64 year olds over the next 15 years. In doing so, their influence is forecast to be reflected in the number of persons per household, which is uniformly expected to decline, while median age is expected to increase in all cities.

However, within the last few years many cities in Southeast Oakland County have experienced considerable development and in-migration. These factors are expected to be reflected in updated SEMCOG forecasts, due to be released in late 1995. Thus, these current forecasts should be treated accordingly.

The personal and family needs and wants of this pre-retirement age group will, nevertheless, play a major role in the regional, County and local area markets over the next fifteen years.

TABLE 1
Selected Population Characteristics & Forecasts - Southeast Oakland County Cities
1980 - 2010

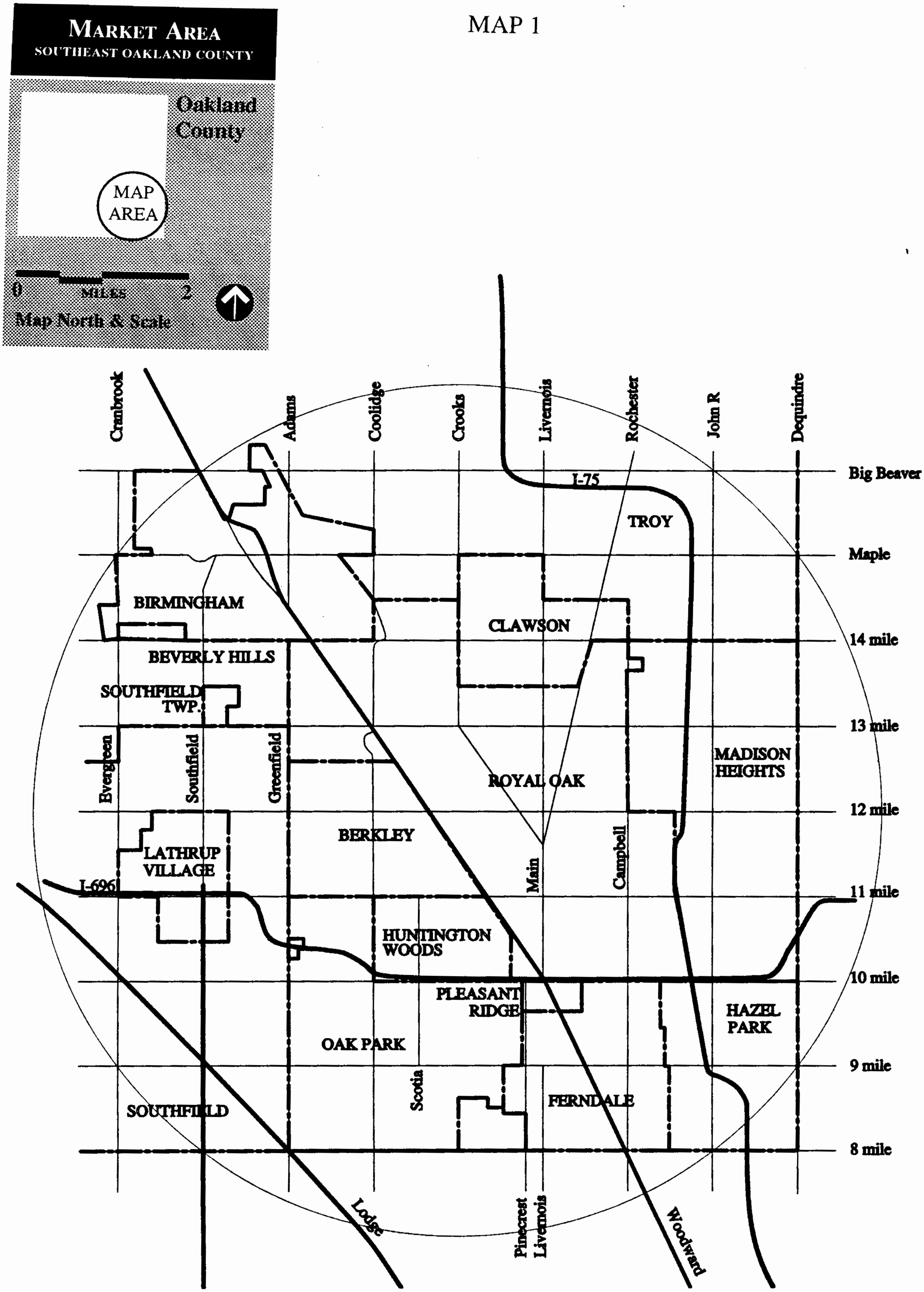
County	1980	1985	1990	1995	2000	2005	2010	Change 1980 to 1990 Number	Change 1980 to 1990 Percent	Change 1990 to 2010 Number	Change 1990 to 2010 Percent
				FORECAST YEAR							
Berkley											
Total Population	18,785	18,133	17,804	17,388	16,847	16,521	16,198	-981	-5.2	-1,606	-9.0
Median Age	30.20	31.52	32.37	33.63	34.75	35.95	36.49	2.18	7.2	4.11	12.7
Persons Per Household	2.79	2.69	2.60	2.51	2.41	2.34	2.28	-0.19	-6.9	-0.32	-12.5
Birmingham											
Total Population	21,869	20,914	20,262	19,956	19,388	19,064	18,860	-1,607	-7.3	-1,402	-6.9
Median Age	34.14	35.64	36.49	37.41	38.52	39.73	40.29	2.35	6.9	3.80	10.4
Persons Per Household	2.42	2.30	2.20	2.11	2.00	1.92	1.86	-0.22	-9.1	-0.34	15.5
Ferndale											
Total Population	26,437	25,553	24,718	23,946	22,997	22,339	21,718	-1,719	-6.5	-3,000	-12.1
Median Age	30.28	3.80	32.79	34.08	35.29	36.57	37.16	2.51	8.3	4.37	13.3
Persons Per Household	2.64	2.52	2.44	2.35	2.26	2.19	2.13	-0.19	-7.3	-0.32	-13.0
Huntington Woods											
Total Population	6,985	6,655	6,456	6,280	6,051	5,883	5,718	-529	-7.6	-738	-11.4
Median Age	34.40	35.92	36.88	38.16	39.35	40.77	41.44	2.48	7.2	4.56	12.4
Persons Per Household	2.83	2.71	2.63	2.54	2.44	2.37	2.30	-0.20	-7.0	-0.33	-12.7
Pleasant Ridge											
Total Population	3,239	3,125	3,034	3,003	2,894	2,827	2,751	-205	-6.3	-283	-9.3
Median Age	32.06	33.62	34.63	35.75	36.90	38.17	38.79	2.57	8.0	4.15	11.0
Persons Per Household	2.77	2.70	2.62	2.54	2.44	2.37	2.30	-0.15	-5.4	-0.32	-12.2
Royal Oak											
Total Population	71,477	68,507	66,728	65,462	63,186	61,739	60,247	-4,749	-6.6	-6,481	-9.7
Median Age	32.59	34.02	34.92	36.04	37.16	38.32	38.89	2.34	7.2	3.97	11.4
Persons Per Household	2.50	2.40	2.32	2.24	2.15	2.08	2.02	-0.18	-7.2	-0.30	-12.0
Beverly Hills											
Total Population	11,682	11,158	11,184	10,959	10,615	10,362	10,124	-498	-4.3	-1,060	-9.5
Median Age	39.31	40.69	41.44	42.53	43.65	45.01	45.78	2.13	5.4	4.34	10.5
Persons Per Household	2.92	2.78	2.69	2.60	2.49	2.41	2.34	-0.22	-7.7	-0.35	-13.1
Clawson											
Total Population	15,220	14,942	14,764	14,537	14,166	13,970	13,731	-456	-2.0	-1,033	-6.0
Median Age	30.98	32.22	33.02	34.13	35.14	36.26	36.86	2.04	6.6	3.84	11.6
Persons Per Household	2.76	2.68	2.59	2.51	2.41	2.35	2.28	-0.17	-6.3	-0.31	-11.9

Table 1 cont'd

County	1980	1985	1990	1995	2000	2005	2010	Change 1980 to 1990 Number	Change 1980 to 1990 Percent	Change 1990 to 2010 Number	Change 1990 to 2010 Percent
Hazel Park											
Total Population	21,074	20,279	19,486	18,948	18,238	17,766	17,302	-1,588	-7.5	2,184	-11.2
Median Age	29.26	30.55	31.51	32.76	33.95	35.35	36.10	2.25	7.7	4.59	14.6
Persons Per Household	2.87	2.78	2.69	2.59	3.49	2.41	2.34	-0.18	-6.2	-0.35	-12.0
Lathrup Village											
Total Population	4,671	4,480	4,470	4,526	4,573	4,648	4,723	-201	-4.3	253	5.7
Median Age	36.83	37.88	38.47	39.23	39.89	40.79	41.12	1.64	4.4	2.65	6.9
Persons Per Household	3.06	2.85	2.74	2.65	2.55	2.47	2.40	-0.32	-10.5	-0.33	-12.2
Madison Heights											
Total Population	35,665	34,196	32,862	31,929	30,739	29,945	29,148	-2,803	-7.9	3,714	-11.3
Median Age	29.17	30.36	31.22	32.39	33.52	34.74	35.46	2.05	7.0	4.24	13.6
Persons Per Household	2.77	2.65	2.55	2.46	2.36	2.29	2.22	-0.22	-7.9	-0.33	-12.9
Oak Park											
Total Population	32,002	31,567	31,625	31,609	31,223	30,753	30,254	-377	-1.2	-1,371	-4.3
Median Age	32.27	33.65	34.57	35.86	37.08	38.47	39.13	2.30	7.1	4.56	13.2
Persons Per Household	2.83	2.80	2.77	2.74	2.70	2.65	2.60	-0.06	-2.3	-0.17	-6.1
Southfield											
Total Population	76,628	75,150	77,547	80,507	82,251	84,437	85,031	919	1	7,484	10
Median Age	35.59	36.89	37.85	38.62	39.22	39.94	40.19	2.26	6.3	2.34	6.2
Persons Per Household	2.51	2.40	2.26	2.22	2.16	2.12	2.07	-0.25	-10.1	-0.19	-8.4
Troy											
Total Population	67,682	66,941	71,749	76,276	82,188	85,792	88,745	4,067	6.0	16,996	23.7
Median Age	29.19	30.28	30.96	31.76	32.13	32.89	33.02	1.77	6.1	2.06	6.7
Persons Per Household	2.93	2.79	2.68	2.56	2.48	2.40	2.33	-0.24	-8.4	-.035	-13.1
Oakland County											
Total Population	1,021,935	1,020,738	1,097,781	1,155,955	1,201,144	1,238,755	1,273,136	75,846	7.4	175,355	15.0
Median Age	30.35	31.41	31.81	32.45	33.04	33.83	34.05	1.47	4.8	2.24	7.0
Persons Per Household	2.82	2.71	2.60	2.52	2.45	2.38	2.32	-0.22	-7.8	-0.28	-10.9
SEMCOG Region											
Total Population	4,764,054	4,620,989	4,689,844	4,781,988	4,860,566	4,932,940	4,996,518	-74,210	-1.6	306,674	6.5
Median Age	29.61	30.45	30.89	31.64	32.31	33.14	33.50	1.28	4.3	2.61	8.5
Persons Per Household	2.84	2.75	2.63	2.56	2.49	2.42	2.36	-0.21	-7.4	-0.27	-10.4

Source: SEMCOG Regional Development Forecast - Version '89

MAP 1


MARKET AREA
SOUTHEAST OAKLAND COUNTY
Oakland County
MAP AREA
0 MILES 2
Map North & Scale
Cranbrook
Adams
Coolidge
Crooks
Livernois
Rochester
John R
Dequindre
Big Beaver
I-75
TROY
Maple
BIRMINGHAM
CLAWSON
14 mile
BEVERLY HILLS
SOUTHFIELD TWP.
13 mile
Evergreen
Southfield
Greenfield
ROYAL OAK
MADISON HEIGHTS
12 mile
BERKLEY
LATHRUP VILLAGE
Main
Campbell
I-696
11 mile
HUNTINGTON WOODS
10 mile
PLEASANT RIDGE
HAZEL PARK
OAK PARK
9 mile
Scotia
SOUTHFIELD
FERNDALE
8 mile
Lodge
Pinecrest
Livernois
Woodward

MARKET ANALYSIS: CHAPTER III

INCOME AND BUYING POWER

INCOME AND BUYING POWER

Purpose of the Chapter

Individual and household income, along with disposable income and buying power are key factors when considering the future development of the Woodward Avenue Corridor Study Area. These factors will be explored, where data is available, for each of the six participating communities in Southeast Oakland County, as well as, the eight nearby cities which together form Southeast Oakland County. In addition, regional and Oakland County data will be reviewed.

RECENT HISTORY AND FORECASTS

In order to gain some insight of household income and its implied buying power, SEMCOG data will be relied upon. Specifically, this agency's population projections, household forecasts and forecast distribution of household income through the year 2010 will be utilized.

In forecasting household income, five income categories were utilized and are listed as follows:

A.	$0	-	$8,647
B.	$8,648	-	$17,238
C.	$17,239	-	$25,290
D.	$25,291	-	$35,741
E.	$35,742	and	above

All forecast income is expressed in 1980 dollars.

A brief analysis of each of the six participating communities along with the major surrounding cities in southeast Oakland County follows.

Berkley

Over the next fifteen years, this community's population is expected to decline slightly (approximately 5%) from its 1990 level of 16,960. Over the same period, the number of households, which totaled 6,598 in 1990, is expected to remain relatively constant and possibly increase slightly.

With a 1989 per capita income of $15,487, the community ranks considerably below the county average of $21,125. Forecasts indicate that the city's households will likely experience an increase in each of the three lower income groups (A, B and C) and declines in higher income groups (D and E) over the next fifteen years.

Birmingham

The population of this city is expected to decline slightly (5%) over the next fifteen years from its 1990 head count of 19,997. However, the total number of households are expected to grow by approximately ten percent - from 9,084 in 1990, to more than 10,000 households in the year 2010.

With a per capita income of $37,061, the city ranks among the very highest in Oakland County, as well as, the state and nation.

Forecasts of household income by subgroup indicate that the lower income groups (A, B and C) are expected to increase both in number and share, within the aforementioned expanding total household count, over the next fifteen years. The higher income categories (D and E) are each expected to remain nearly constant with respect to number of households but represent declining shares of the expanding total.

Ferndale

Over the next fifteen years this city's population is forecast to steadily decline by approximately 10% from its 1990 level of 25,084. However, over the same period, the total number of households is expected to vary only slightly from the 9,899 in 1990.

With a 1989 per capita income of $12,704, the city ranks among the lowest in Oakland County. Within the context of a relatively constant number of households, the forecasted changes in household income indicate an increase in the share of each of the lower income groups (A and B), with declines expected in the higher groups (D and E) over the next 1½ decades.

Huntington Woods

This community had a 1990 population of 6,419 which is expected to steadily decline to approximately 6,000 by the year 2010. The number of households which stood at 2,370 in 1990 is expected to remain relatively constant over the next 15 years.

With a 1989 per capita income of $28,897, this community ranks among the highest in Oakland County. Nevertheless, forecasts indicate that over the next 15 years the two high income groups (D and E) will decline in relation to the expected expansion of the three lower income categories, within a somewhat constant total number of households.

Pleasant Ridge

With a 1989 per capita income of $23,301, the city of some 2,775 people ranked above the county average. Its number of households totaled 1,048 in 1990. This figure is expected to increase slightly over the next fifteen years.

With respect to household income, it is expected that proportionately more households will fall into each of the lowest income segments (groups A, B and C), while each of the higher income groups are expected to experience relative declines. Little change is expected in the total population over the next 15 years.

Royal Oak

According to the 1990 Census, Royal Oak's per capita income was $18,065. This is slightly below the county per capita income level of $21,125. It is estimated that the number of households will increase slightly from the 1990 level of 28,344 to nearly 30,000 in 2010. However, over the same period, the city's population is expected to steadily decline from 65,410 in 1990 to approximately 60,000 in the year 2010.

In general, the forecasts indicate a relative decline in the respective shares of total households in the highest income groups (D and E). Conversely, the forecasts indicate growth in the shares of households within the lower income ranges (groups A, B and C).

OTHER NEARBY CITIES

A review of the profiles of each of the eight communities reveals a variety of characteristics and forecasts with respect to population, number of households, per capita income, as well as, household income.

Forecasts through the year 2010 predict population declines in Beverly Hills, Hazel Park and Madison Heights, while population is expected to remain relatively stable in Clawson, Lathrup Village and Oak Park. Only the cities of Southfield and Troy are expected to experience significant population growth.

Similarly, significant growth in the number of households over the same period is forecast only for Lathrup Village, Southfield and Troy. The remaining five jurisdictions are expected to remain stable with respect to the number of households. With regard to household income characteristics, all five cities are expected to experience an increase in the number and relative share of the lower income groups (A and B), while the higher income groups are expected to decline in both number and share. Forecasts for Lathrup Village, Southfield and Troy generally indicate that income ranges will expand in response to expected growth in the number of households, with little shift in distribution. With respect to per capita income, these eight communities represent a considerable spread, as indicated below.

- Beverly Hills $31,562
- Clawson $15,892
- Hazel Park $11,018
- Lathrup Village $24,122
- Madison Heights $14,192
- Oak Park $14,544
- Southfield $21,098
- Troy $23,249

BUYING POWER

Table 1 represents an excerpt from the most recent edition of the *Survey of Buying Power*, published by Sales and Marketing Management. Buying power for the Detroit Metropolitan Area, its component counties and major cities, are set forth. These data, although not available for all the communities in Southeast Oakland County, nevertheless, offer a valuable look at some of the larger cities as viewed from a national perspective, with a focus on disposable income, or effective buying power. The Detroit Metro market ranks sixth nationally, as measured by Buying Power Index (BPI). When the City of Detroit is excluded, the Suburban Detroit Effective Buying Income (EBI) ranks fifth in the nation, with an estimated total EBI of approximately $61.2 billion.

With respect to Median Household EBI, the Detroit Metro area ranks 50th in the nation with a level of $39,387. In looking at households with EBIs of $50,000 and above, the Detroit Metro area ranks fourth in the country, with nearly 593,000 households in this group. Having 28,000 households, with EBIs of $150,000 and above, the Detroit Market ranks twelveth nationally. Oakland County is the dominant community that drives these outstanding buying power statistics.

CONCLUSION

As noted elsewhere in this study, approximately two thirds of the shoppers interviewed in the Users Survey (conducted in December 1993) resided within a five mile radius of Woodward Avenue at Catalpa (11 1/2 mile). This area embraces Southeast Oakland County and portions of neighboring Detroit and Warren.

The recent history (1970-1990) of the population of the cities that comprise this area indicates general and steady decline, with a few notable exceptions. Similarly, forecasts indicate that these trends are likely to continue through the year 2010. Again, there are exceptions, and population changes are expected to vary by community. However, the same forecasts indicate that the number of households for the 14 communities discussed above is likely to remain relatively stable in most communities and expand slightly in the balance of the cities. The combined number of households is expected to increase from 161,661 in 1990 to 183,548 in 2010. This represents an increase of 21,887 or 13.5%.

The forecasts indicate that the percentage of households in higher income groups will generally decline, while the households falling in lower income groups are expected to grow in number and relative share of the total. This reflects a continuation of a pattern which has been evident for quite some time and is characteristic of mature, fully developed, suburban communities. Contributing to these forecasts are factors such as decline in family and household size, the general aging of the population and migration patterns. Nevertheless, these trends are of primary importance when viewing the redevelopment potential of Woodward Avenue, particularly with respect to the linkage and market support that the nearby neighborhoods and communities represent to the retail establishments on Woodward.

It should also be emphasized that Oakland County ranks among the highest buying power communities in the nation. Six of the 14 communities in Southeast Oakland County have per capita income levels which exceed the County average of $21,125.

Although the immediate neighborhood submarket contains six cities with average per capita income below $16,000, the buying power of the area is diverse and is located in a County generally described as affluent. Thus, the objectives would appear to be twofold: 1) draw upon this affluence while, 2) continuing to support and serve the diverse neighboring communities.

TABLE 1

EFFECTIVE BUYING INCOME - 1994
Detroit Metropolitan Area
by
County and Major Cities

METRO AREA County City	Total EBI ($000)	Median Hsld EBI	% of Hslds by EBI Group: (A) $10,000 - $19,999	(B) $20,000 -$34,999	(C) $35,000 - $49,999	(D) $50,000 & Over	Buying Power Index
			A	B	C	D	
Detroit	74,443,809	39,387	13.3	18.9	18.7	37.0	1.7651
Lapeer	1,194,055	41,456	13.3	20.1	20.7	37.9	0.0289
Macomb	12,789,360	43,144	11.8	19.9	21.5	40.1	0.3287
Roseville	750,349	36,180	15.3	24.1	23.9	27.9	0.0258
St.Clair Shores	1,204,542	41,149	12.7	21.8	22.5	36.7	0.0282
Sterling Heights	2,167,436	50,879	8.3	15.6	20.1	51.3	0.0586
Warren	2,316,716	40,116	13.2	21.9	21.5	35.8	0.0641
Monroe	2,049,233	39,446	13.8	20.6	20.8	35.4	0.0460
Oakland	26,927,628	51,395	9.0	15.7	17.9	51.6	0.5998
Farmington Hills	2,199,571	60,186	6.2	12.7	16.1	61.1	0.0438
*Pontiac	798,377	27,311	19.4	20.2	18.1	22.2	0.0224
Rochester Hills	1,695,224	63,868	5.7	11.3	13.9	65.4	0.0311
Royal Oak	1,436,077	44,109	10.7	19.8	22.0	41.7	0.0330
Southfield	2,023,346	48,285	9.7	16.8	19.2	47.8	0.0601
Troy	2,131,046	63,804	5.8	10.3	14.7	65.2	0.0580
St. Clair	2,283,708	35,973	15.0	22.1	20.1	31.3	0.0543
*Port Huron	435,112	25,833	20.0	24.3	17.0	18.9	0.0158
Wayne	29,199,825	31,740	16.2	20.1	17.7	28.1	0.7074
*Dearborn	1,569,469	38,871	14.3	20.7	18.8	36.2	0.0469
Dearborn Heights	1,033,195	41,121	13.2	21.5	20.8	37.8	0.0215
*Detroit	10,397,065	21,604	20.3	20.1	15.2	17.1	0.2546
Lincoln Park	604,735	34,310	16.3	24.8	22.4	26.5	0.0158
Livonia	2,049,436	53,193	7.4	14.8	19.0	54.6	0.0526
Taylor	983,251	36,996	13.2	22.6	22.2	30.9	0.0289
Westland	1,404,899	39,098	12.5	22.9	23.0	33.7	0.0351
SUBURBAN TOTAL	61,243,786	45,180	11.0	18.4	19.8	43.6	1.4254

Source: Survey of Buying Power, published by Sales & Marketing Management, 1994.

DEFINITION OF SELECTED TERMS IN THE SURVEY OF BUYING POWER

(Table 1 Supplement)

Buying Power Index (BPI):

A weighted index that converts the Survey's three basic elements - population (the demographic factor), Effective Buying Income (the economic factor), and retail sales (the distribution factor) - into a measurement of a market's "ability to buy," expressing it as a percentage of the national total (100.0000%). The BPI is calculated by first producing a ratio of local population, income, and retail sales to the comparable U.S. totals, then assigning a weight of .5 to an area's income; .3 to retail sales; and .2 to population. These weights are then multiplied by the appropriate ratios and the resulting figures added together to produce the BPI for a state, metro, county, or city.

Effective Buying Income (EBI):

A classification developed exclusively by *Sales & Marketing Management* to distinguish it from other sources reporting income statistics, EBI is defined as personal income less personal tax and nontax payments - a number often referred to as "disposable" or "after-Tax" income.

Personal income is the aggregate of wages and salaries, other labor-related income (such as employer contributions to private pension funds), proprietor's income, rental income (which includes imputed rental income of owner-occupants of non-farm dwellings), dividends paid by corporations, interest income from all sources, and transfer payments (such as pensions and welfare assistance).

Deducted from this total are personal taxes (federal, state, and local), non-tax payments (fines, fees, penalties, etc.), and personal contributions to social insurance. According to U.S. government definitions, the resultant figure is commonly known as "disposable personal income."

Generally speaking, EBI is a bulk measurement of market potential indicating the ability to buy, and it is essential for selecting, comparing, and grouping markets on this basis. For products that appeal to more specific income classes, marketers should examine data showing the percentage of households by EBI Group and the Buying Power Index (BPI).

Median Household EBI:

This calculation takes the household distribution by Effective Buying Income, or EBI, and divides it into two equal groups, with half the households above, and half below, the resulting figure. *S&MM* prefers to use medians rather than averages for charting EBI, since they have proven to be a more reliable indicator of an area's income levels and are far less likely to be skewed by statistical oddities that adversely affect averages.

Percentage of Households by EBI Group:

These figures show the percentage of total households with Effective Buying Incomes in each of four different ranges. By adding the four percentages for a given metro, county, or city and subtracting the resulting total from 100%, the share of households with EBI under $10,000 can also be calculated. To convert the percentage figures to actual household counts, multiply the area's total households by the corresponding percentage. The Regional and State Summary of Effective Buying Income table in Section B shows actual household totals rather than percentages for these categories.

BERKLEY
FERNDALE
ROYAL OAK
BIRMINGHAM
PLEASANT RIDGE
HUNTINGTON WOODS
Woodward Avenue Corridor Study
A COMMUNITY BASED IMPROVEMENT PROJECT

MARKET ANALYSIS: CHAPTER IV

RETAIL TRADE

RETAIL TRADE

Purpose of the Chapter

In this section retail trade activity will be looked at in basically four ways. First, activity, as measured by number of establishments and sales, will be reviewed for each of the six participating cities, as well as, the aforementioned eight nearby cities of Beverly Hills, Clawson, Hazel Park, Lathrup Village, Madison Heights, Oak Park, Southfield and Troy, which together form the Southeast Oakland County area. This analysis will cover the 15 year period 1977-1992, which represents four reporting periods.

Second, activity, again measured by number of establishments and sales, will be studied by ten major Standard Industrial Classifications (SICs), as reported by the U.S. Bureau of the Census. Third, retail centers in Southeast Oakland County will be reviewed by type and location, in order to further develop the "context" of the Woodward Avenue Corridor Study Area. Fourth, a profile of businesses in the Study Area will be developed, utilizing the *Bresser's Directory* and an analysis of the database by Standard Industrial Classifications.

Before proceeding the reader should bear in mind that all dollar values presented are expressed in current dollars; i.e., 1992 data are expressed in 1992 dollars and 1987 data in 1987 dollars. Consequently, when making comparisons to prior years, users of the data should consider the inflation that has occurred. When making comparisons between sales data for 1977 and 1992, a CPI factor of approximately 2.3 should be imputed.

Similarly, when attempting to make comparisons between census reporting periods, with respect to number of establishments, some data appear to be suspect. This is especially true with regard to some of the smaller units of government: i.e. Lathrup Village. The apparent discrepancies may be explained by changes in SIC groups, as well as, other definitional changes. Nevertheless, the data appears adequate for observing general trends.

RETAIL ACTIVITY BY REGION, COUNTY AND SELECTED CITIES

According to the *Survey of Buying Power*, the Detroit area market, in 1994, accounted for approximately $37.4 billion of retail sales, for a sixth place national ranking. With respect to retail sales by the major store groups, the metro Detroit market ranking ranged from third (general merchandise store sales, and automotive dealer sales) to eighth place (food store sales).

Oakland County's total retail sales in 1992 exceeded $12 billion. This represented a considerable increase over the $4.5 billion levels in 1977. When applying a CPI factor of 2.3, the County's sales growth exceeded the CPI adjusted level by $1.6 billion.

The County experienced major growth in population, adding over 70,000 people between 1980 and 1990. As noted in the "Income and Buying Power" section of this study, Oakland County enjoys a prominent national ranking as one of the nation's most affluent counties.

In looking at Table 1, the role of the Southeast Oakland County area as the major concentration of retail sales activity in the county becomes evident. In 1992 the combined sales of the 14 listed cities amounted to nearly $5.4 billion, or approximately 45% of the County's total, down from a 1977 level of 56.4 %. This change was to be expected in light of the considerable population growth in the northern and western suburban communities and the corresponding retail development. It, nevertheless, remains a dominant retail center of the region and county.

In 1977 the six communities accounted for a total 1,376 retail establishments. By 1992 this total had declined by 25.8% to a level of 1,021 establishments. To a great extent this change is reflective of national trends and, therefore, not surprising. In general, these declines can be attributed to market forces such as competition from mall development and mall expansion, shifting consumer shopping behavior and general consolidation within various sectors.

With respect to combined retail sales for this group of cities, its share of total County sales decreased from 16.5% in 1977, to 11.6% in 1992. This change is partially explained by the significant increase in sales elsewhere in the County, particularly in the western and northern suburban communities. Also, although the sales data are unadjusted for inflation, the "increases" recorded appear to indicate sales did not keep pace with inflation.

With respect to the eight major nearby cities, the total number of establishments remained relatively stable between 1977 and 1992. However, this balance was not uniform for all eight cities. In fact, seven of the eight experienced absolute declines in the number of establishments. Only the city of Troy experienced an increase (from 486 in 1977 to 631 in 1992) in establishments. Correspondingly, the most impressive increases in sales over the 15 years were recorded by Troy, Southfield and Madison Heights.

Tables 2A, 2B, and 2C contain supplementary information regarding retail related employment and payroll for all of Oakland County's communities.

RETAIL ACTIVITY BY INDUSTRY SECTOR

In looking at retail trade by industry sector for the six participating communities, it is significant that the combined total of establishments in all categories, except one, declined between the years 1977 and 1992 (Table 3). In 1977 the six communities accounted for a total 1,376 retail establishments spanning the following ten SIC categories:

Building Materials & Garden Supply - SIC 52
General Merchandise - SIC 53
Food Stores - SIC 54
Automotive Dealers - SIC 55 (excl. 554)
Gasoline Service Stations - SIC 554
Apparel & Accessory - SIC 56
Furniture & Home Furnishing - SIC 57
Eating & Drinking - SIC 58
Drug & Proprietary - SIC 591
Misc. Retail Stores - SIC 59

By 1992 this total had declined by 25.8%, to a level of 1,021 establishments (Table 1A).

The largest percentage declines were experienced by "General Merchandise" (-7, or -46.7%), Gasoline Service Stations (-46, or -6.5%), Automotive Dealers (-34, or -43.6%), and Miscellaneous Retail Stores (-166, or -37.3%).

The decline in automotive dealerships primarily occurred between 1977 and 1982 and is largely attributed to the development of the "motor mall" in Troy. Since then the decline has been relatively small.

The decline in general merchandise establishments, largely characterized as department stores, has been steady over the period spanning 1977-92.

With respect to "Miscellaneous Retail Stores," this category recorded a decline of 220 establishments, according to the U.S. Bureau of Census, between 1977 and 1982. However, the magnitude of this decline is suspect for the reasons noted in the introduction. Between 1982 and 1987 the number of establishments increased by 35, to a total of 260. Similarly, it grew to 279 by 1992, but remained considerably below the 1977 level.

The decline in gasoline service stations was most pronounced in the period from 1977-1982, declining by some 41%. The number of establishments has remained relatively stable since then. Corporate consolidation, new suburban development and reformatting of service offerings have characterized this sector over the last 15 years.

As noted, the one exception to the general decline in the number of establishments occurred in the "Eating & Drinking" category, which increased by 30 establishments (13.8%) between 1977 and 1992. Of significance, was the activity in Royal Oak between 1987 and 1992. During this period the city added 44 eating and drinking establishments, an increase of 52.3%. Sales in Royal Oak from this category jumped from approximately $42 million to nearly $71 million (unadjusted for inflation).

The City of Birmingham ranked second in sales from eating and drinking establishments with nearly $40 million reported for 1992. However, this was less than the 1987 level of $42.5 million (unadjusted for inflation).

With regard to "Apparel & Accessory" sales, Birmingham dominated the six participating communities, with nearly $87 million (1992), compared with Royal Oak's $14.6 million. However, Birmingham's sales ebbed between 1987 and 1992, while Royal Oak's jumped approximately 41% (unadjusted).

In deference to the fact that approximately two-thirds of the Users Survey respondents resided within a five mile radius of Woodward Avenue (at Catalpa), the retail sales of the major neighboring cities in Southeast Oakland County were also included in the analysis of retail sales by SIC category.

Between 1977 and 1992 the total number of retail establishments (in the ten selected categories) in the eight communities decreased from 2,581 to 2,321 - a loss of some 260 establishments, or nearly 10%. Losses were experienced in six of the ten groups. Gains were recorded in "Eating & Drinking" (112), "Apparel" (12) and "General Merchandise" (6), while "Food Stores" remained relatively constant.

In general, it appears that most of the eight communities experienced losses in the number of establishments over the fifteen year period. However, gains were recorded, as might be expected, in the cities of Southfield and Troy, which also experienced considerable population growth over the same period. Also worthy of note is the city of Madison Heights, which lost population over this period and has a median household income considerably below the County level, nevertheless the city experienced an increase in the number of establishments in several categories, namely: "Apparel & Accessory Stores" (6), "Eating & Drinking" (22) and "General Merchandise" (3). Much of this development occurred on John R. Road, which saw considerable development during this time.

RETAIL CENTERS IN SOUTHEAST OAKLAND COUNTY

Woodward Avenue, in addition to serving as a major traffic artery in southeast Michigan, has also traditionally served as a home to scores of retail businesses. These observations are also true of the section of Woodward under study.

In addition to the foregoing analysis, which focused on number of establishments, sales and SIC groups, it was deemed useful to also look at the physical distribution of the centers of retail activity in the Southeast Oakland County area.

Map 1 and its companion Table 4 plot the location of the major retail centers by type and size, from major regional shopping malls to neighborhood facilities. Also displayed are the strip retail developments, of at least 1/2 mile length, which are characteristic of the retail/commercial development in the mature cities in the area. Within the area are four traditional downtowns, which comprise many retail facilities. These four centers are in Berkley, Birmingham, Ferndale, and Royal Oak.

All of these centers of retail activity are within the previously referred to five-mile radius i.e. within a short driving distance for the residents of the area. These centers of retail offerings represent competition to Woodward Avenue, especially for those offerings closely related to basic neighborhood needs such as food, drugs, building materials, etc. The number, location and retail mix of these centers must be kept in mind when reviewing the comments recorded in the Users Survey and Focus groups with respect to desired retail activities suggested for Woodward Avenue.

BUSINESS PROFILE

According to the current issue of *Bresser's Directory* (1994-95), the Woodward Avenue Corridor Study Area has approximately 640 business mailing addresses. The vast majority of these addresses are occupied by a single business entity. However, approximately 50 of the business addresses represent multi-tenanted office buildings.

A cursory review of the *Bresser's Directory* suggests that when multi-tenanted facilities are included, the total estimated number of business entities located in the study area is approximately 910. As might be expected, occupants of multi-tenanted facilities fall into a spectrum of professional categories. Doctors and attorneys are, by far, the dominant sub-groups, while CPA, architectural, real estate, mortgage, insurance and marketing professional service firms account for the balance.

As one might expect, the distribution of these professionals is not uniform throughout the study area but, rather, is concentrated. For example, the City of Huntington Woods accounts for only 14 Woodward Avenue business addresses, or approximately 2% of the total (640); yet, it has 11 multi-tenanted office buildings, which account for approximately 130 (130/910 = 14.3%) professional business listings. The vast majority of the group are medical service professionals.

Thus, although the study area is generally regarded as a retail shopping corridor, it appears that approximately 30% (259/910) of the business entities can be classified as professional service providers, with the medical and legal sub-groups holding dominant shares. This is particularly significant in light of two factors. First, the Study Area, as noted in the "Office Building" section, contains relatively few office buildings. Second, the recent office building development on Woodward Avenue tends to suggest that professional service business entities are likely to claim an increasing share of total entities on Woodward Avenue in the foreseeable future. This may be especially true with respect to medical services, which are likely to expand in response to the forecasted increase in median household age and older age groups in the Southeast Oakland County communities.

In addition to the review of *Bresser's Directory*, the database was examined by Standard Industrial Classifications (SICs) in order to obtain a profile of the business establishments in the Study Area.

This effort yielded a total of approximately 666 business entities. This number excludes individual residences and apartment complexes, but does include vacant buildings. Since this total is slightly higher (less than 5%) than the 640 business addresses identified in the *Bresser's* review, a figure of 650 business entities is deemed a reasonable rounded number for the purpose of this review and will be so adopted henceforth.

As noted above, it is probably fair to indicate that the Woodward Study Area is generally regarded as a "retail" corridor. However, upon closer examination, this observation is called into question. First, of the approximate 650 business entities, retail establishments (SIC #52) account for 50%. The balance is made up of primarily services, office buildings and vacant buildings. A summary of the profile is as follows:

Category (SIC#)	Number	Percent
Retail (#52)	331	50%
Fin./Ins. & RE (#60)	46	7%
Personal Services (#70)	150	23%
Professional Services (#80)	64	10%
Office buildings	19	3%
Vacant buildings	56	8%

Service related business entities which embrace personal, professional, finance/insurance and real estate categories, account for approximately 40% of the total. However, the database is comprised only of the business characteristics of ground-floor establishments. Thus, when the occupants of office buildings are taken into consideration, the total number of business establishments jumps to approximately 900. Of this total, retail establishments account for approximately 37% (331/900), while the combined services group represents a significant majority at 63%. Admittedly this analysis is based on only one factor, namely, number of business entities. It does not take into account the value of business entities (sales, receipts, worth, etc.), nor does it take into account the number of employees, payroll, etc. It, nevertheless, does highlight a factor that might otherwise be minimized or overlooked, i.e. the importance of the service sector to the economic base of the Study Area.

As might be expected, the relatively few office buildings (19) in the Study Area account for approximately 250 business entities. This group is primarily made up of medical professionals. However, it is also noteworthy that the database of ground floor business establishments (650) also contained some 35 (5%) listings of doctors and other related medical professionals. Thus, in planning for the Study Area, the critical role, trends and needs of the service sectors should be of paramount importance.

In order to complete this business profile section, a brief review of the major SIC groups will be presented. It is anticipated that a detailed business profile report will be prepared and presented separate from this market analysis.

With respect to "Eating and Drinking" (SIC #58) establishments, the combination of fast food and sit-down restaurants account for 91 entries. This represents 27.5% (91/331) of the total retail establishments and 14% (91/650) of the total ground-floor businesses captured in the database.

Excluding the catch-all miscellaneous category, the other primary retail groups in rank order are:

- Women's Clothing 26
- Furniture & Home Furnishings 26
- Auto Dealers, etc. 20
- Gas Stations 17
- Radio, TV, Stereo 16
- Food 12
- Sporting Goods 12

Combined, this group accounted for 39% (129/331) of the retail establishments. All other detailed listings accounted for nine or less entries per sub category. Thus, the above group of seven categories, when added to the combined group of fast food and sit-down restaurants, accounted for approximately two-thirds of the retail establishments.

It should be noted that despite the fact that the number of auto dealerships has declined in the six participating communities over the last two decades, Woodward Avenue is still home to some 20 dealer and related establishments.

Similarly, this Corridor is home to other high-priced durable goods businesses, i.e. furniture, home furnishings, as well as, radio, TV and stereo equipment.

Turning to the "Finance, Insurance and Real Estate" (FIRE-SIC #60) group, it is not surprising that banks and other depository institutions accounted for 12 of the 46 entries. Likewise, real estate businesses totaled 12 in number. No doubt Woodward's ease of access, traffic volume and exposure are assets to these establishments.

With respect to the "Services" (SIC #70) category, which accounted for a total of 150 entries, the following are the major components.

• Personal Services	49
• Business Services	35
• Auto Related Services	34
• Misc. Repair	10
• Hotels, Motels	11
• Other	11

The "Personal Services" group was dominated by beauty shops (23) and laundry/dry cleaning establishments (12).

Photocopying and duplicating services (12) head the "Business Services" group. "Auto Related Services" was distributed among a variety of sub groups and tends to reinforce the importance of the auto sector on the Woodward Corridor.

Finally, as expected, the "Professional Services" (SIC #80) category was dominated by doctors and related medical professionals (34/64), with attorneys, CPAs and other professionals accounting for the balance.

CONCLUSION

In general, it appears that retail activity, as measured by number of establishments, in the six participating communities has declined over the last 15 years. Further reduction, but perhaps at a diminishing rate, would appear to be a likely short range (3-5 years) scenario, based on a continuation of changes in retail marketing, further suburban expansion and further developments of retail facilities which expand consumer choice.

Similarly, retail sales for these cities are likely to continue the recent pattern and be influenced by any further reduction in the number of establishments, particularly, if such reduction results in non retail (i.e. office, etc.) activity occupying previous retail activity.

These observations would appear to generally reflect national and regional trends. They also apply to the eight nearby cities, which share many of the historical characteristics and whose recent retail activities parallel that of the six participating communities. There are, however, exceptions such as Troy, Southfield and, to a lesser extent, Madison Heights, which are likely to continue to lead the area in positive retail activity into the next century.

To the extent, that some of the forces that have produced the recent changes are likely to continue and are beyond the control of local officials, they need to be acknowledged in the collective strategic outlook for Woodward Avenue. The relative role of business activity in these communities, particularly on Woodward Avenue is likely to continue to shift, yielding a greater mix of service activities. In addition, the mix of retail activity is also likely to change. In recent years it appears that smaller square foot facilities have been replaced by larger "footprint" stores. Expansions have also been evident throughout the Corridor. Both of these occurrences have, in many cases, been accompanied by increased on-site parking development.

Also, the role of Woodward Avenue and its business establishments varies widely. In some cases it forms part of a downtown (Ferndale). In other cases it bisects the city (Pleasant Ridge, Royal Oak, and Birmingham). In still others it forms a boundary (Berkley and Huntington Woods).

The retail activities along the corridor vary somewhat in their dependence and orientation to the nearby neighborhoods. They also appear to vary by the degree of dependence on broader market areas. This appears to be particularly true with respect to north Woodward specialty retail establishments.

National research indicates that nine of ten purchases are now made in stores, with the rest through catalogs, other direct-mail and TV shopping. Forecasts indicate that ten years from now about two-thirds of purchases will be in the stores. Most shoppers will still want to feel the merchandise before they buy.

Thus, it appears that community demographics, will continue to be a major influence on the nature of the retail establishments and their offerings for the foreseeable future.

The 14 Southeast Oakland County cities represent nearly 40% of the County's population and households. The area also accounted for $5.4 billion in retail sales or 45% of the County's total. Within this diverse market area, are communities with per capita incomes and buying power which exceed the County average, which is acknowledged as among the highest in the nation. This nearby community base when coupled with forecasted increases in commuter traffic on Woodward Avenue and the broader market of the County's (and region's) resident buying power are positive business indicators for the future.

APPENDIX

RETAIL TRADE

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TABLE 1

Retail Trade Activity: Summary
Woodward Corridor Communities
and
Selected Southeast Oakland County Cities

	Number of Establishments				*Sales ($1,000)			
	1992	1987	1982	1977	1992	1987	1982	1977
Berkley	116	154	157	138	92,029	97,175	65,428	48,158
Birmingham	332	350	382	392	430,066	415,559	243,196	211,805
Ferndale	151	163	175	220	218,625	208,577	135,273	133,478
Huntington Woods	10	16	27	32	8,883	7,359	6,605	4,630
Pleasant Ridge	8	8	19	16	8,386	8,413	4,492	3,281
Royal Oak	404	327	475	578	640,492	521,121	372,468	338,555
Subtotals(n=6)	1,021	1,018	1,235	1,376	1,398,481	1,258,204	827,462	739,907
Bev. Hills	26	17	50	50	27,749	15,929	16,335	14,003
Clawson	106	104	103	116	126,014	67,472	50,384	47,347
Hazel Park	94	107	138	162	105,064	86,296	68,089	59,928
Lathrup Village	36	49	91	187	32,786	37,007	42,766	76,237
Madison Hts.	229	223	256	235	485,611	313,602	189,674	110,163
Oak Park	257	269	290	360	360,373	285,590	17,610	158,917
Southfield	942	1003	1169	983	1,550,556	1,370,511	971,961	778,169
Troy	631	597	664	486	1,270,104	1,208,433	780,303	568,439
Subtotals(n=8)	2,321	2,369	2,761	2,579	3,958,257	3,384,840	2,137,122	1,813,203
Subtotals(n=14)	3,342	3,387	3,996	3,955	5,356,738	4,643,044	2,964,584	2,553,110
Oakland County	7,525	7,057	8,188	7,741	12,035,247	9,245,723	5,975,958	4,528,678

*Sales data are unadjusted for inflation. When comparing Sales in 1977 with 1992 (15 years) an CPI factor of approximately 2.3 should be imputed.

Source: Census of Retail Trade, U.S. Bureau of the Census: 1977, 1982, 1987, 1992.

TABLE 2A

Summary Statistics for Oakland County Places with 2,500 Inhabitants or More

Sorted by Sales

Community	Establish-ments	Sales ($1,000)	Annual Payroll ($1,000)	First Quarter Payroll ($1,000)	Paid Employees
Southfield	942	$1,550,556	$183,640	$42,243	13531
Troy	631	$1,270,104	$137,443	$31,141	10363
Waterford Twp.	456	$911,591	$100,593	$23,267	7729
Farmington Hills	460	$869,177	$97,943	$23,005	6985
Novi	378	$733,447	$81,270	$19,249	6961
Royal Oak	404	$640,792	$80,937	$19,001	6054
Rochester Hills	244	$606,941	$69,636	$15,602	4895
Pontiac	430	$537,604	$61,624	$14,944	5454
Madison Heights	229	$485,611	$49,650	$11,818	4551
Birmingham	332	$430,066	$59,991	$14,295	4229
Oak Park	257	$360,373	$43,866	$9,360	2784
West Bloomfield	255	$299,253	$39,526	$9,131	2753
Bloomfield Hills	152	$282,600	$38,265	$8,585	2336
Commerce Twp.	116	$270,217	$28,279	$5,617	1628
Independence Twp.	133	$224,583	$23,764	$5,253	1786
Walled Lake	125	$221,264	$27,205	$5,452	1709
Ferndale	151	$218,625	$27,411	$6,162	1696
Farmington	187	$204,040	$24,916	$5,693	2075
Bloomfield Twp.	100	$192,376	$25,215	$5,864	1844
Rochester	223	$176,467	$26,571	$6,043	2679
Lake Orion	110	$146,540	$17,025	$3,930	1446
Clawson	106	$126,014	$16,903	$3,961	1481
Auburn Hills	110	$110,262	$17,357	$3,779	1671
Hazel Park	94	$105,064	$13,196	$2,857	1013
Highland Twp.	60	$102,816	$9,665	$2,169	651
Berkley	116	$92,029	$13,505	$2,824	1033
Oxford Twp.	53	$71,655	$7,960	$1,804	596
White Lake Twp.	33	$68,921	$7,639	$1,827	593
Milford Twp.	69	$66,060	$8,205	$1,948	774
Holly Twp.	52	$54,054	$6,275	$1,407	580
South Lyon	52	$48,917	$5,813	$1,305	637
Lathrup Village	36	$32,786	$4,917	$1,425	362
Beverly Hills	26	$27,749	$4,584	$921	392
Wixom	26	$21,621	$2,792	$688	263
Keego Harbor	47	$19,657	$2,970	$671	269
Orion Twp.	22	$16,071	$1,707	$349	162
Brandon Twp.	16	$11,787	$1,222	$224	112
Franklin	13	$11,658	$2,836	$548	69
Huntington Woods	10	$8,883	$1,220	$294	91
Pleasant Ridge	8	$8,386	$1,304	$273	85
Northville Pt.	9	$2,575	$490	$119	53
Balance of County	250	(D)	(D)	(D)	(D)
Wolverine Lake Vil	2	(D)	(D)	(D)	(D)
Oakland County	7525	$12,035,247	$1,420,519	$325,475	108474

(D) - Withheld to avoid disclosing data for individual companies;
data included in broader kind of business totals.

Source: 1992 Census of Retail Trade

TABLE 2B

Summary Statistics for Oakland County Places with 2,500 Inhabitants or More

Sorted by Number of Establishments

Community	Establish-ments	Sales ($1,000)	Annual Payroll ($1,000)	First Quarter Payroll ($1,000)	Paid Employees
Southfield	942	$1,550,556	$183,640	$42,243	13531
Troy	631	$1,270,104	$137,443	$31,141	10363
Farmington Hills	460	$869,177	$97,943	$23,005	6985
Waterford Twp.	456	$911,591	$100,593	$23,267	7729
Pontiac	430	$537,604	$61,624	$14,944	5454
Royal Oak	404	$640,792	$80,937	$19,001	6054
Novi	378	$733,447	$81,270	$19,249	6961
Birmingham	332	$430,066	$59,991	$14,295	4229
Oak Park	257	$360,373	$43,866	$9,360	2784
West Bloomfield	255	$299,253	$39,526	$9,131	2753
Balance of County	250	(D)	(D)	(D)	(D)
Rochester Hills	244	$606,941	$69,636	$15,602	4895
Madison Heights	229	$485,611	$49,650	$11,818	4551
Rochester	223	$176,467	$26,571	$6,043	2679
Farmington	187	$204,040	$24,916	$5,693	2075
Bloomfield Hills	152	$282,600	$38,265	$8,585	2336
Ferndale	151	$218,625	$27,411	$6,162	1696
Independence Twp.	133	$224,583	$23,764	$5,253	1786
Walled Lake	125	$221,264	$27,205	$5,452	1709
Berkley	116	$92,029	$13,505	$2,824	1033
Commerce Twp.	116	$270,217	$28,279	$5,617	1628
Lake Orion	110	$146,540	$17,025	$3,930	1446
Auburn Hills	110	$110,262	$17,357	$3,779	1671
Clawson	106	$126,014	$16,903	$3,961	1481
Bloomfield Twp.	100	$192,376	$25,215	$5,864	1844
Hazel Park	94	$105,064	$13,196	$2,857	1013
Milford Twp.	69	$66,060	$8,205	$1,948	774
Highland Twp.	60	$102,816	$9,665	$2,169	651
Oxford Twp.	53	$71,655	$7,960	$1,804	596
Holly Twp.	52	$54,054	$6,275	$1,407	580
South Lyon	52	$48,917	$5,813	$1,305	637
Keego Harbor	47	$19,657	$2,970	$671	269
Lathrup Village	36	$32,786	$4,917	$1,425	362
White Lake Twp.	33	$68,921	$7,639	$1,827	593
Beverly Hills	26	$27,749	$4,584	$921	392
Wixom	26	$21,621	$2,792	$688	263
Orion Twp.	22	$16,071	$1,707	$349	162
Brandon Twp.	16	$11,787	$1,222	$224	112
Franklin	13	$11,658	$2,836	$548	69
Huntington Woods	10	$8,883	$1,220	$294	91
Northville Pt.	9	$2,575	$490	$119	53
Pleasant Ridge	8	$8,386	$1,304	$273	85
Wolverine Lake Vil	2	(D)	(D)	(D)	(D)
Oakland County	7525	$12,035,247	$1,420,519	$325,475	108474

(D) - Withheld to avoid disclosing data for individual companies;
data included in broader kind of business totals.
Source: 1992 Census of Retail Trade

TABLE 2C

Summary Statistics for Oakland County Places with 2,500 Inhabitants or More

Sorted by Paid Employees

Community	Establish-ments	Sales ($1,000)	Annual Payroll ($1,000)	First Quarter Payroll ($1,000)	Paid Employees
Southfield	942	$1,550,556	$183,640	$42,243	13531
Troy	631	$1,270,104	$137,443	$31,141	10363
Waterford Twp.	456	$911,591	$100,593	$23,267	7729
Farmington Hills	460	$869,177	$97,943	$23,005	6985
Novi	378	$733,447	$81,270	$19,249	6961
Royal Oak	404	$640,792	$80,937	$19,001	6054
Rochester Hills	244	$606,941	$69,636	$15,602	4895
Pontiac	430	$537,604	$61,624	$14,944	5454
Madison Heights	229	$485,611	$49,650	$11,818	4551
Birmingham	332	$430,066	$59,991	$14,295	4229
Oak Park	257	$360,373	$43,866	$9,360	2784
West Bloomfield	255	$299,253	$39,526	$9,131	2753
Bloomfield Hills	152	$282,600	$38,265	$8,585	2336
Commerce Twp.	116	$270,217	$28,279	$5,617	1628
Independence Twp.	133	$224,583	$23,764	$5,253	1786
Walled Lake	125	$221,264	$27,205	$5,452	1709
Ferndale	151	$218,625	$27,411	$6,162	1696
Farmington	187	$204,040	$24,916	$5,693	2075
Bloomfield Twp.	100	$192,376	$25,215	$5,864	1844
Rochester	223	$176,467	$26,571	$6,043	2679
Lake Orion	110	$146,540	$17,025	$3,930	1446
Clawson	106	$126,014	$16,903	$3,961	1481
Auburn Hills	110	$110,262	$17,357	$3,779	1671
Hazel Park	94	$105,064	$13,196	$2,857	1013
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Holly Twp.	52	$54,054	$6,275	$1,407	580
South Lyon	52	$48,917	$5,813	$1,305	637
Lathrup Village	36	$32,786	$4,917	$1,425	362
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Wixom	26	$21,621	$2,792	$688	263
Keego Harbor	47	$19,657	$2,970	$671	269
Orion Twp.	22	$16,071	$1,707	$349	162
Brandon Twp.	16	$11,787	$1,222	$224	112
Franklin	13	$11,658	$2,836	$548	69
Huntington Woods	10	$8,883	$1,220	$294	91
Pleasant Ridge	8	$8,386	$1,304	$273	85
Northville Pt.	9	$2,575	$490	$119	53
Balance of County	250	(D)	(D)	(D)	(D)
Wolverine Lake Vil	2	(D)	(D)	(D)	(D)
Oakland County	7525	$12,035,247	$1,420,519	$325,475	108474

(D) - Withheld to avoid disclosing data for individual companies;
data included in broader kind of business totals.

Source: 1992 Census of Retail Trade

TABLE 3

Retail Trade by Industry Sector
Woodward Corridor Communities
and
Selected Southeast Oakland County Communities

Building Materials & Garden Supply - SIC 52

	Number				Sales ($1,000)			
	1992	1987	1982	1977	1992	1987	1982	1977
Berkley	5	5	6	6	6,186	4,452	4,946	2,987
Birmingham	13	16	17	18	19,870	21,751	12,629	25,981
Ferndale	4	4	5	5	(D)	2,314	3,619	1,147
Huntington Woods	0	0	0	0	0	0	0	0
Pleasant Ridge	0	0	1	2	0	0	0	0
Royal Oak	26	23	14	27	41,784	21,603	12,282	16,722
Bev. Hills	1	1	6	2	(D)	(D)	4,946	(D)
Clawson	5	5	4	6	5,539	6,601	4,053	3,215
Hazel Park	5	6	5	8	5,287	5,391	1,974	1,384
Lathrup Village	0	1	0	7	0	(D)	0	565
Madison Hts.	7	6	3	8	5,710	(D)	(D)	3,595
Oak Park	8	8	6	10	15,996	11,820	6,495	3,780
Southfield	18	17	17	28	25,696	26,688	19,764	15,086
Troy	17	19	11	20	24,267	18,962	11,970	11,499

General Merchandise - SIC 53

	Number				Sales ($1,000)			
	1992	1987	1982	1977	1992	1987	1982	1977
Berkley	1	3	2	3	(D)	0	0	0
Birmingham	2	4	5	5	(D)	0	0	10,596
Ferndale	0	1	1	1	0	0	0	0
Huntington Woods	0	0	0	0	0	0	0	0
Pleasant Ridge	0	0	0	0	0	0	0	
Royal Oak	5	2	5	6	(D)	0	0	0
Bev. Hills	0	0	0	0	0	0	0	0
Clawson	2	1	1	1	(D)	(D)	(D)	(D)
Hazel Park	1	2	0	2	(D)	(D)	0	(D)
Lathrup Village	0	0	0	2	0	0	0	(D)
Madison Hts.	5	3	2	2	(D)	(D)	(D)	(D)
Oak Park	6	4	1	10	(D)	2,404	(D)	1,306
Southfield	21	9	10	16	168,467	181,176	153,361	(D)
Troy	11	12	9	7	235,012	234,042	160,781	156,285

Table 3 (cont'd)

Food Stores - SIC 54	Number				Sales ($1,000)			
	1992	1987	1982	1977	1992	1987	1982	1977
Berkley	25	36	28	20	21,185	13,050	12,840	9,937
Birmingham	23	29	20	23	33,786	43,870	22,688	23,559
Ferndale	19	19	19	34	19,461	33,507	27,852	17,796
Huntington Woods	1	5	1	1	(D)	1,617	0	0
Pleasant Ridge	1	1	1	1	(D)	0	0	0
Royal Oak	35	36	34	52	97,287	78,753	55,727	57,697
Bev. Hills	3	2	4	4	(D)	(D)	(D)	(D)
Clawson	13	16	14	20	18,250	16,157	15,784	19,202
Hazel Park	16	18	15	29	31,600	21,886	21,419	21,365
Lathrup Village	1	3	5	21	(D)	(D)	4,637	7,645
Madison Hts.	24	23	29	42	64,659	54,322	47,230	23,140
Oak Park	56	66	36	53	81,331	93,925	57,310	50,476
Southfield	136	120	113	100	152,598	152,466	138,457	93,374
Troy	77	58	55	63	95,100	90,900	90,192	64,020

Automotive Dealers - SIC 55 Excl. 554	Number				Sales ($1,000)			
	1992	1987	1982	1977	1992	1987	1982	1977
Berkley	4	9	5	5	7,834	6,526	2,191	1,586
Birmingham	11	7	10	17	76,512	50,677	30,280	31,256
Ferndale	12	11	9	15	117,077	100,374	50,204	78,430
Huntington Woods	0	0	0	1	0	0	0	0
Pleasant Ridge	0	0	0	0	0	0	0	0
Royal Oak	17	23	24	40	128,152	155,641	87,449	111,062
Bev. Hills	0	0	0	0	0	0	0	0
Clawson	5	7	3	6	4,694	5,620	2,699	2,614
Hazel Park	7	10	8	13	4,337	6,402	6,570	3,522
Lathrup Village	1	1	2	11	(D)	(D)	(D)	41442
Madison Hts.	16	16	13	23	48,438	46,411	24,814	20,483
Oak Park	7	6	6	10	(D)	(D)	(D)	(D)
Southfield	23	26	37	39	498,370	391,221	226,285	164,734
Troy	23	28	20	27	377,267	386,236	201,312	152,030

Table 3 (cont'd)

	Gasoline Service Stations - SIC 554							
	Number				Sales ($1,000)			
	1992	1987	1982	1977	1992	1987	1982	1977
Berkley	9	12	7	12	9,540	10,343	5,948	4,248
Birmingham	14	15	15	15	17,076	16,429	24,063	9,059
Ferndale	4	5	4	20	3,976	4,188	6,173	5,410
Huntington Woods	0	1	1	1	0	0	0	0
Pleasant Ridge	1	1	2	0	(D)	0	0	0
Royal Oak	25	23	29	51	38,598	32,612	43,377	29,354
Bev. Hills	1	0	0	4	(D)	0	0	1,424
Clawson	3	8	10	12	3,282	8,305	9,065	4,434
Hazel Park	10	9	12	20	6,400	8,598	12,633	6,886
Lathrup Village	2	2	2	2	(D)	(D)	(D)	(D)
Madison Hts.	15	23	14	19	27,886	31,561	16,908	11,148
Oak Park	35	27	15	24	47,895	29,362	16,336	14,452
Southfield	44	51	46	57	64,010	61,595	68,464	(D)
Troy	25	30	32	38	47,867	53,953	40,736	19,558

	Apparel & Accessory - SIC 56							
	Number				Sales ($1,000)			
	1992	1987	1982	1977	1992	1987	1982	1977
Berkley	3	10	7	16	(D)	4,726	3,291	3,366
Birmingham	69	73	70	81	86,772	88,099	56,016	47,609
Ferndale	14	19	7	16	6,853	7,803	2,323	2,602
Huntington Woods	0	0	0	3	0	0	0	230
Pleasant Ridge	0	0	0	2	0	0	0	0
Royal Oak	18	15	24	40	14,595	10,364	10,252	0
Bev. Hills	1	1	2	6	(D)	(D)	(D)	2,830
Clawson	8	6	3	6	4,547	2,991	(D)	849
Hazel Park	2	2	2	4	(D)	(D)	(D)	604
Lathrup Village	14	13	14	23	18,272	21,108	15,232	5,828
Madison Hts.	14	13	11	8	15,983	8,939	7,712	1,621
Oak Park	25	28	22	45	18,610	13,300	12,142	14,789
Southfield	161	207	181	173	158,201	152,262	99,502	88,572
Troy	126	121	99	74	178,161	149,962	99,287	71,369

Table 3 (cont'd)

Drug & Proprietary - SIC 591	Number				Sales ($1,000)			
	1992	1987	1982	1977	1992	1987	1982	1977
Berkley	3	7	3	3	6,823	7,165	3,647	0
Birmingham	9	9	9	12	16,169	19,131	11,368	7,854
Ferndale	7	6	5	5	21,034	9,811	0	1,539
Huntington Woods	1	2	2	1	(D)	0	0	0
Pleasant Ridge	0	0	0	1	0	0	0	0
Royal Oak	10	8	11	20	20,353	7,460	9,145	0
Bev. Hills	0	4	1	2	0	2,888	(D)	(D)
Clawson	3	4	1	2	(D)	2,873	(D)	(D)
Hazel Park	5	5	4	5	(D)	7,307	(D)	4,852
Lathrup Village	0	0	1	3	0	0	(D)	(D)
Madison Hts.	7	8	7	5	17,592	16,198	8,722	4,680
Oak Park	12	15	11	8	17,259	18,620	11,783	(D)
Southfield	29	43	36	30	60,746	42,671	25,790	(D)
Troy	9	21	22	16	26,526	27,165	25,754	17,472

Misc. Retail Stores - SIC 59	Number				Sales ($1,000)			
	1992	1987	1982	1977	1992	1987	1982	1977
Berkley	32	37	25	38	(D)	0	0	7,239
Birmingham	106	102	84	138	(D)	0	0	25,811
Ferndale	38	44	36	69	(D)	0	11,865	0
Huntington Woods	5	5	3	16	1,882	0	371	901
Pleasant Ridge	1	2	3	6	(D)	0	0	148
Royal Oak	97	70	74	178	(D)	0	0	35,269
Bev. Hills	12	3	6	28	4,670	(D)	1,100	1,483
Clawson	24	21	8	28	(D)	(D)	2,990	3,443
Hazel Park	13	13	13	35	(D)	(D)	2,729	(D)
Lathrup Village	11	13	16	50	(D)	4,931	6,387	7,705
Madison Hts.	45	37	37	53	(D)	24,091	20,532	(D)
Oak Park	65	62	43	132	37,120	(D)	15,925	19,195
Southfield	215	220	197	297	184,925	131,909	81,980	51,744
Troy	147	124	107	138	91,919	89,107	47,560	26,827

(D)--Withheld to avoid disclosing data for individual companies; data are included in broader kind-of-business totals.

Source: Census of Retail Trade, U.S Bureau of the Census: 1977, 1982, 1987, 1992.

Table 3 (cont'd)

Furniture & Home Furnishing - SIC 57

	Number				Sales ($1,000)			
	1992	1987	1982	1977	1992	1987	1982	1977
Berkley	6	8	7	7	5,624	3,577	1,484	1,386
Birmingham	36	46	30	48	45,438	49,321	15,754	17,267
Ferndale	13	14	18	21	11,477	12,884	8,984	6,292
Huntington Woods	1	2	1	7	(D)	0	0	143
Pleasant Ridge	4	2	3	1	2,514	0	0	0
Royal Oak	43	43	43	57	56,070	58,600	34,998	22,487
Bev. Hills	0	0	0	2	0	0	0	(D)
Clawson	10	8	4	10	5,509	5,160	1,392	3,213
Hazel Park	3	4	5	10	1,416	3,069	2,690	3,216
Lathrup Village	3	6	4	20	2,925	1,118	(D)	1,344
Madison Hts.	18	18	17	19	68,350	26,144	15,511	9,039
Oak Park	10	11	17	30	13,311	11,148	9,534	11,289
Southfield	65	80	64	77	99,335	95,910	59,255	42,706
Troy	55	45	35	27	91,035	63,822	38,710	20,297

Eating & Drinking - SIC 58

	Number				Sales ($1,000)			
	1992	1987	1982	1977	1992	1987	1982	1977
Berkley	28	27	34	28	12,733	16,085	12,696	7,253
Birmingham	49	49	35	35	39,637	42,445	19,493	12,813
Ferndale	40	40	27	34	14,075	15,831	8,256	5,375
Huntington Woods	2	1	2	2	(D)	0	0	0
Pleasant Ridge	1	1	0	2	(D)	0	0	0
Royal Oak	128	84	76	107	70,728	41,739	27,754	30,791
Bev. Hills	8	6	6	2	7,184	6,773	2,607	(D)
Clawson	33	28	26	25	17,066	12,912	9,472	6,572
Hazel Park	32	38	35	36	14,816	15,846	12,701	10,766
Lathrup Village	4	10	26	48	1,755	3,997	10,681	9,391
Madison Hts.	78	76	60	56	55,026	43,405	31,750	16,654
Oak Park	33	42	32	38	16,596	17,887	8,942	9,201
Southfield	230	230	186	166	138,208	134,613	88,298	62,701
Troy	141	139	108	76	102,950	94,284	56,942	29,082

TABLE 4
Retail Centers in Southeast Oakland County

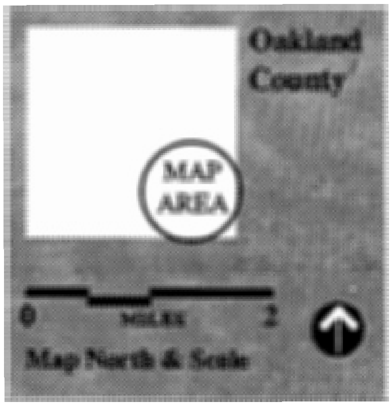
#	City	Name	Classification	Sq. Ft. Area
1	Birmingham CBD			
2	"	South Adams Square	CC	
3	Troy Somerset North	RC (currently under construction)		
4	"	Somerset Collection	RC	385,000
5	"	Design Center	NC	
6	"	KMart	CC	
7	"	Oakland Mall	SRC	1,500,000
8	"	Oakland Square	CC	
9	"	Oakland Plaza	CC	
10	Clawson	CBD		
11	"	Bywood Square	NC	
12	"	Clawson Shopping Ctr.	CC	197,500
13	Royal Oak	Builder's Square	NC	
14	"	Meijer	CC	247,000
15	"	Village Landing	NC	
16	"	Northwood Center	CC	214,675
17	"	CBD		
18	Lathrup Village	Park Avenue Shop. Ctr.	NC	
19	Southfield	The Corners	NC	100,000
20	"	Southfield Plaza	CC	310,000
21	"	Evergreen Plaza	CC	104,130
22	"	Greenfield Shopping Plaza	NC	
23	"	Northland Center	SRC	2,103,000
24	Berkley	CBD		
25	Oak Park	Lincoln Center	CC	100,000
26	"	Parkwood Plaza	NC	
27	"	Coolidge Park Plaza	NC	
28	"	Oak Park Shopping Plaza	NC	
29	"	Park Place	NC	
30	"	Northland Plaza	RC	250,000
31	Ferndale	CBD		
32	Madison Heights	Campbell Corners	NC	100,000
33	"	Madison Place	CC	420,000
34	"	Madison Square	NC	
35	"	Home Quarters	CC	
36	"	Royal Madison Plaza	NC	
37	"	Madison Shopping Center	CC	179,975
38	"	Madison Manor	NC	
39	Warren	Universal Mall	RC	
40	"	Parkview Square	NC	
41	Hazel Park	Hazel Park Center	NC	
42	"	Yankee Shopping Center	NC	

Note: CBD - Central Business District
SRC - Super Regional Center - 600,000-1,500,000 Gross Leasable Area in Sq. Ft.(GLA)
RC - Regional Center - 350,000-850,000 GLA
CC - Community Center - 100,000-450,000 GLA
NC - Neighborhood Center - 30,000-100,000 GLA

MAP 1

See table 4 for explanation of numered entries.

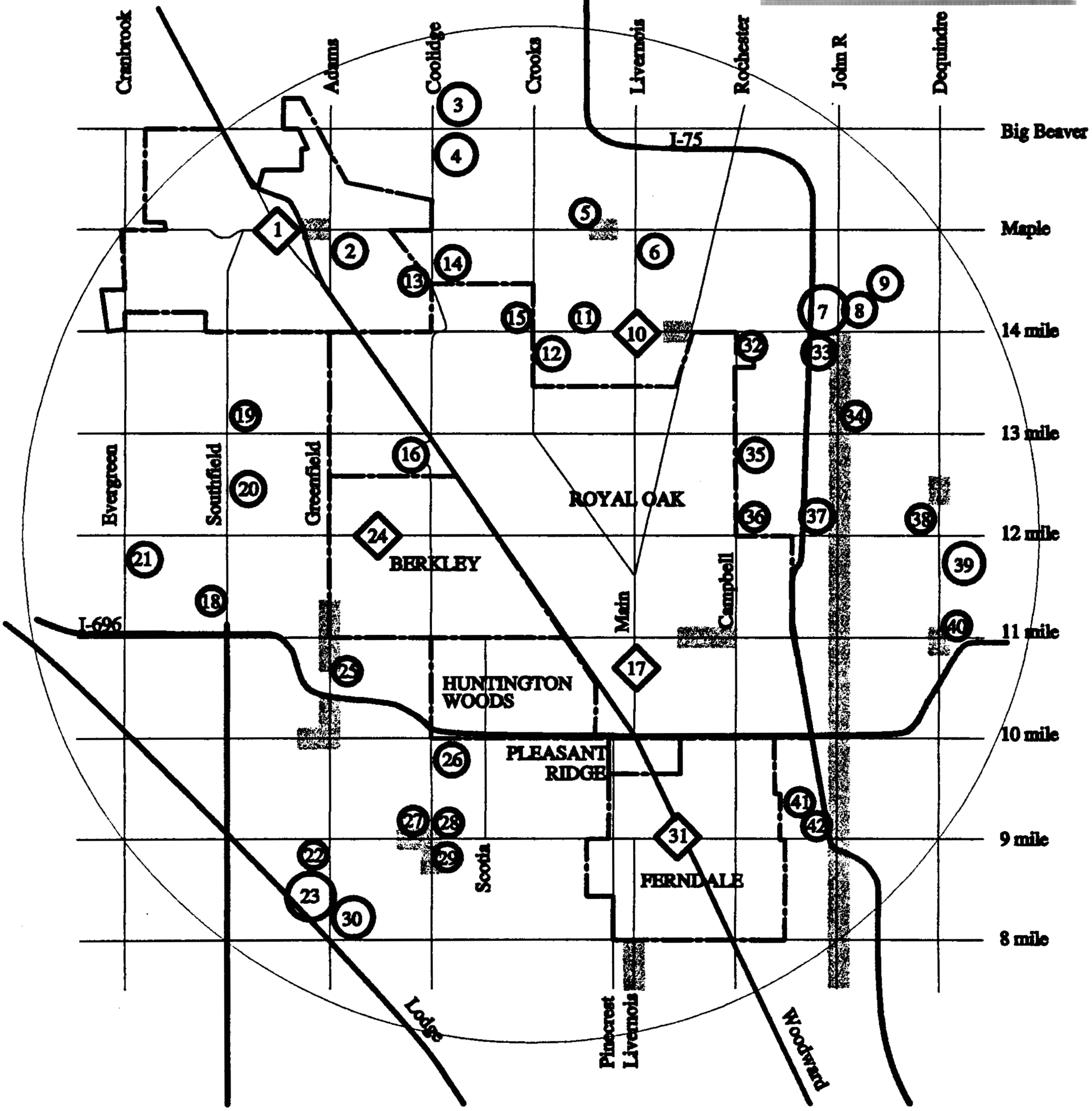
RETAIL CENTERS
SOUTHEAST OAKLAND COUNTY



LEGEND

- ◇ Central Business District (CBD)
- ○ Super-Regional Center - 600,000-1,500,000 GLA
- ○ Regional Center - 350,000-850,000 GLA
- ○ Community Center - 100,000-450,000 GLA
- ○ Neighborhood Center - 30,000-100,000 GLA
- ▒ Strip Retail 1/2 mile or greater in length (approx.)

(GLA = Gross Leasable Area in Square Feet)



MARKET ANALYSIS: CHAPTER V

VACANCY SURVEY

VACANCY SURVEY

Purpose of the Chapter

In late 1993 a team of students from Lawrence Technological University (LTU) conducted a physical inventory of the buildings on Woodward Avenue between 8 Mile and Quarton Road. As part of that survey the team also conducted an inventory of vacant retail facilities. Subsequently, the vacancy survey data were updated twice, in July and again in December 1994. Specifically, the updates sought to determine the status of facilities previously identified as vacant, as well as, identifying any new vacancies. The results of all three surveys are listed in Tables 1 and 1A.

Before proceeding, it should be noted that these surveys were primarily limited to retail establishments and focused on ground-floor activity and one-story buildings. Vacancies in multi-tenanted "office" buildings were omitted. The reader is referred to the "Office Building" section of this study for such vacancy data.

Also, it should be pointed out that the quality and, therefore, the reliability of the data has improved with each survey. Of particular concern is the completeness and accuracy of the first survey. Thus, the reader is cautioned to take this into account when making comparisons. Nevertheless, it is felt that data is adequate for making general observations.

RESULTS

In 1993 a total of 30 retail stores were identified as vacant. The number grew to 52 in the mid-1994 survey, a net increase of 22 or 73%. By December 1994, the number of vacancies climbed to 70. When compared with the prior year's survey, this represented an increase of 40 units or 133%. Since, as noted above, the first survey's data are somewhat suspect, this comparison and its resultant numbers should be treated accordingly.

The largest net increases in vacancies were recorded at the northern end of the Woodward Avenue study area, namely between Thirteen Mile Road and Quarton Road (Big Beaver). Specifically, net vacancies in this three mile segment grew from five (5) to twenty seven (27) between the first and third surveys - a twelve-month span. Other noteworthy net vacancy increases were recorded between Nine and Ten Mile Roads (4), Eleven and Twelve Mile Roads (3) and Twelve to Thirteen Mile Roads (7).

Of further significance is the fact that, of the 30 vacancies identified in 1993, only four were occupied by the July 1994 survey. Conversely, 26 (87%) of the facilities were still vacant some seven to eight months after the initial survey. The December 1994 survey identified eight (8) new businesses, which had moved into locations previously identified as vacant.

The reasons why the various businesses left their Woodward location are, unfortunately, not available. However, it seems reasonable to assume that business failures and relocations accounted for many, if not most, of the vacancies.

We do, however, have some information regarding new businesses which have occupied locations previously identified as vacant. This information is contained in Table 2.

A review of this table indicates a rather diverse group. The only "duplication" of entries appears in the travel and tourism sector, which placed two such establishments in Ferndale. Professional services (law, marketing) accounted for two entries.

Of particular interest is the fact that two of the listings of "new" businesses are actually expansions of existing businesses growing and expanding into adjacent facilities.

CONCLUSION

Table 1 also indicates that, of the 70 vacancies identified in December 1994, 21 facilities were recorded as vacant in the prior two surveys. The Study's database indicates that there are a total of approximately 650 ground floor establishments. Thus, the 70 vacancies represent approximately 10.8% of the total. The long term vacancies (21) represent nearly 30% of the December 1994 total and 3% of the total facilities comprising the database.

Although the relative number of vacancies may not represent a cause for alarm, they merit concern, for at least three reasons. First, although business turnover and the resultant vacancies are to be expected, the overall trend of such activity appears to have increased significantly over the last 12-15 months. A continuation of this trend could have negative effects on the economic base and vitality of the corridor.

Second, the vacancies appear to be increasing in a non-uniform pattern. Some 39 of the 70 vacancies were located in the northern part of the Corridor between Twelve Mile and Quarton Road.

Third, long-term vacancies can be especially troublesome factors to the nearby merchants, neighborhood, as well as, the property owner. Although these long-term vacancies are generally scattered throughout the Study Area, their impact on the above noted vested interests and the general appearance of the Avenue are, nevertheless, cause for concern.

Table 1

WOODWARD AVENUE CORRIDOR STUDY
RETAIL VACANCY SURVEY - DETAILED
by mile road

Road	Address	Status 12/93	7/94	12/94
8-9 Mile				
1.	21205 Woodward	O	O	V
--	21210 Woodward	V	V	O
2.	22042 Woodward	O	O	V
3.	22044 Woodward	O	O	V
--	22046 Woodward	V	V	O
--	22100 Woodward	V	V	O
4.	22446 Woodward	O	O	V
5.	22720 Woodward *	V	V	V
6.	22742 Woodward *	V	V	V
7.	22747 Woodward *	V	V	V
8.	22751 Woodward *	V	V	V
9-10 Mile				
9.	22801 Woodward	O	V	V
10.	22831 Woodward.	O	V	V
11.	23257 Woodward.	O	V	V
12.	23535 Woodward *	V	V	V
13.	23214 Woodward.	O	O	V
--	23418 Woodward	V	O	O
--	23420 Woodward	O	V	O
14.	23634 Woodward	O	O	V
--	23906 Woodward	V	O	O
15.	24100 Woodward	O	V	V
16.	24200 Woodward *	V	V	V
10-11 Mile				
17.	1135 Woodward *	V	V	V
18.	1111 Woodward	O	V	V
19	615 Woodward *	V	V	V
20.	26075 Woodward	O	O	V
--	26611 Woodward	V	V	O
21.	26657 Woodward	O	O	V
22.	26711 Woodward	O	O	V
11-12 Mile				
--	1212 Woodward	O	V	O
23.	1965 Woodward *	V	V	V
24.	1991 Woodward	O	V	V
25.	2051 Woodward *	V	V	V
26.	2250 Woodward	O	O	V
27.	2413 Woodward *	V	V	V
--	2721 Woodward	V	V	O
--	2875 Woodward	V	O	O
28.	3237 Woodward	O	V	V
29.	3321 Woodward	O	V	V
30.	600 Woodward *	V	V	V
31.	604 Woodward	O	V	V

Road	Address	Status 12/93	7/94	12/94
12-13 Mile				
32.	2200 Woodward *	V	V	V
33.	2250 Woodward	O	V	V
34.	2454 Woodward *	V	V	V
35.	2468 Woodward *	V	V	V
36.	2462 Woodward	O	V	V
37.	2610 Woodward	O	O	V
38.	3212 Woodward	O	O	V
39.	2709 Woodward	O	V	V
40.	2715 Woodward *	V	V	V
41.	2801 Woodward	O	O	V
42.	3101 Woodward	O	V	V
43.	3367 Woodward *	V	V	V
13-14 Mile				
44.	3800 Woodward	O	O	V
45.	4214 Woodward	O	O	V
46.	4334 Woodward	O	O	V
47.	4430 Woodward	O	O	V
48.	4409 Woodward *	V	V	V
49.	4503 Woodward	O	O	V
14-15 Mile				
50.	1845 Woodward	O	O	V
51.	1673 Woodward	O	V	V
52.	1775 Woodward	O	V	V
53.	1619 Woodward	O	V	V
54.	1631 Woodward	O	O	V
55.	1309 Woodward	?	?	V
56.	1283 Woodward *	V	V	V
57.	Bet. 1259 - 1283 Wo	O	V	V
--	1835 Woodward	V	V	O
58	1846 Woodward *	V	V	V
59	N of 374 Woodard	O	O	V
60	845 Hunter	O	V	V
61	625 Hunter	O	V	V
62	386 Hunter	O	V	V
63	296 Hunter *	V	V	V
64	288 Hunter	O	V	V
15 Mile - Big Beaver				
65	300 Park	O	O	V
66	Bet. 386-390 Hunte	O	O	V
67	390 Hunter	O	V	V
68	1100 Woodward	O	O	V
69	1400 Woodward	O	O	V
70	1550 Woodward	O	O	V
--	1595 Woodward	O	V	O

Total Number of Vacancies	30	52	70

* Property vacant for all three surveys
? Denotes questionable data
O = Occupied
V = Vacant

Source: December, 1993 survey conducted by Lawrence Technological University;
July, 1994 and Dec., 1994 updates completedby O.C. Development & Planning.

TABLE 1A

WOODWARD AVENUE CORRIDOR STUDY
RETAIL VACANCY SURVEY - SUMMARY
By Mile Road

Number of Vacancies

Mile Segment	December, 1993	July, 1994	December, 1994
8-9 Mile	7	7	8
9-10 Mile	4	7	8
10-11 Mile	3	4	6
11-12 Mile	6	10	9
12-13 Mile	5	9	12
13-14 Mile	1	1	6
14-15 Mile	4	12	15
15 Mile - Big Beaver	0	2	6
Total	**30**	**52**	**70**

Source: December, 1993 survey conducted by Lawrence Technological University;
July, 1994 and Dec., 1994 updates completed by O.C. Development & Planning.

MAP 1

See Table 1 for explanation of numbered entries.

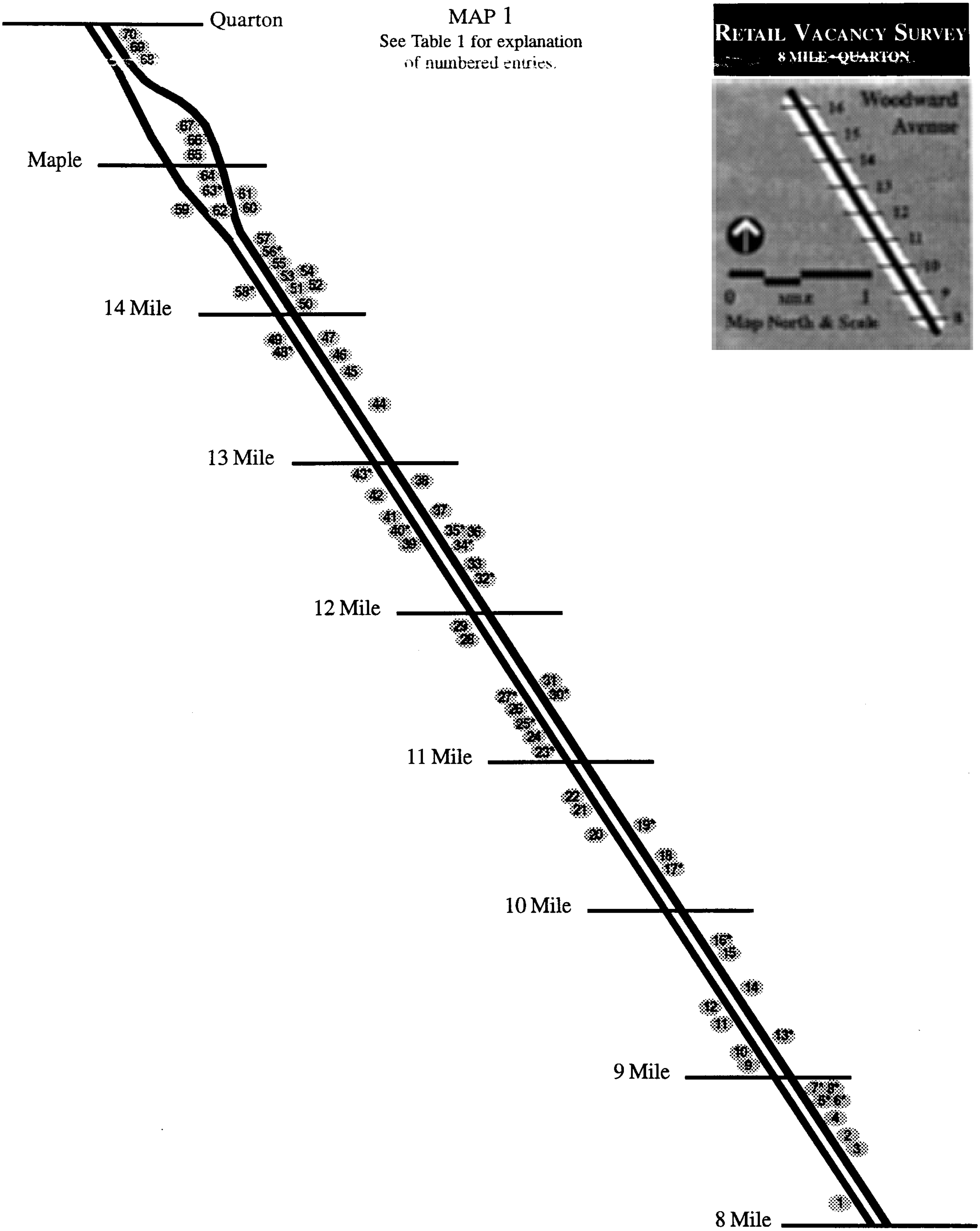


TABLE 2

WOODWARD AVENUE CORRIDOR STUDY
RETAIL VACANCY SURVEY
Filled by Retail Businesses

Updated In July, 1994

	Company Name	Address	Phone
9-10 Mile	Alaska Bound (Travel)	23906 Woodward Ave.	548-2420
	Black Tie Formal Wear	23418 Woodward Ave.	398-8050
11-12 Mile	Apartment Search	2875 Woodward Ave.	547-9172
12-13 Mile	Movie Mania Video	2200 Woodward Ave.	546-0069

Updated in December, 1994

8-9 Mile	Crandall Worthington *	21210 Woodward Ave.	
	New Life Auto Uphol. Ser.	22100 Woodward Ave	
9-10 Mile	Tiger Tours	23420 Woodward Ave	
10-11 Mile	It's the Law (law firm)	26611 Woodward Ave	
11-12 Mile	Manage Mktg Services *	1212 Woodward Ave	
	Chapter 11 Sports	2721 Woodward Ave	
14-15 Mile	Fast Signs	1315 Woodward Ave	
	Stewart Fabrics	1835 Woodward Ave	

* Denotes expansion of existing business

MARKET ANALYSIS: CHAPTER VI

OFFICE BUILDINGS

OFFICE BUILDINGS

Purpose of the Chapter

In reviewing available data and reports concerning the status of office building activity in the southeastern Michigan area, it is immediately apparent that the Woodward Avenue Study Area is not considered a significant sub-market of the metropolitan Detroit office market. Nevertheless, since Oakland County communities dominate the suburban office building market, it is important to analyze the existing conditions and recent trends in this significant economic sector and its potential impact on the Study Area.

METROPOLITAN DETROIT OFFICE MARKET

In general, the major office building sub-markets, ranked by rentable square footage, are listed as follows:

- Southfield (29.8%)
- Detroit CBD (24.0%)
- Troy (19.5%)
- Farmington Hills (7.6%)
- Birmingham/Bloomfield Hills (6.8%)

According to The Hayman Company, these sub-markets account for approximately 88% of the office inventory (rentable sq. ft.) in Metropolitan Detroit.

The total metropolitan Detroit office inventory consists of approximately 58 million rentable square feet. Of this total, the suburban markets account for nearly 76% (43 million sq. ft.), with the City of Detroit's CBD representing some 24%.

Of significance is the fact that Oakland County communities account for approximately 67% of the Metro Detroit office market inventory. The balance is distributed among the Detroit CBD (24%), Dearborn (5.1%) and Livonia (4%).

A review of market reports and related articles indicates that the nearly decade-long slump in the office rental market is finally over. 1993 and 1994 represented stabilization and turnaround years for the overall market, with results varying in the respective sub-markets.

Generally speaking, absorption activity has improved, vacancy rates have declined and the recent spate of corporate downsizing seems to have subsided. Specifically, the combined vacancy rate for suburban sub-markets has declined from a recent high in 1991, in excess of 20%, to 14.7% in 1994. In fact, according to Grubb & Ellis: "The metropolitan Detroit suburban office market has grown and developed into one of the leading office markets in the Midwest today."

It should also be noted that addition of new construction office space in the metropolitan Detroit office market has declined from nearly 5 million sq. ft. in 1987 to less than 1 million sq. ft. in 1993 and 1994. This limited new construction activity has contributed to the aforementioned tightening in the overall and selected sub-markets.

In general, sectors in the metropolitan Detroit tenant office market with the greatest presence in multi-tenanted office buildings are: insurance companies, law firms, medical, retailers and wholesalers.

According to The Hayman Company, 1994 represented a "pivotal" year for Detroit's metropolitan office market. Specifically, they noted that: "vacancies are continuing to decline, rental rates are rising...and absorption is the healthiest in years." Continuing, the Hayman officials noted that: "Vacancies will likely level off into 1995, due to the lack of new construction and smaller blocks of continuous space available in the marketplace."

For 1994, the overall Detroit metropolitan office market had a vacancy rate of 15.4% down from a recent high of 18%. Vacancy rates in 1994 for Oakland's major office building sub-markets were as follows:

- Southfield (20.1%)
- Troy (13.8%)
- Bloomfield Hills (13.1%)
- Novi (12.7%)
- Birmingham (11.2%)
- West Bloomfield (10.8%)
- Auburn Hills/Rochester Hills (7.5%)
- Farmington Hills (6.7%)

The amount of vacant office space, expressed as a percent of the Metro Detroit market total, for Oakland's major sub-markets is listed as follows:

- Southfield (39%)
- Troy (17.6%)
- Bloomfield Hills (3.6%)
- Farmington Hills (3.3%)
- Birmingham (1.9%)
- Novi (1.1%)

- West Bloomfield (0.7%)
- Auburn Hills/Rochester Hills (0.4%)

BIRMINGHAM/BLOOMFIELD OFFICE SUB-MARKET

The Birmingham/Bloomfield sub-market is often cited as "the" prestige office market in the metro Detroit area. Office buildings are able to command the highest rent, approximately $25 a square foot. Generally, financial service and law firms want a prestige location and correspondingly make up a large part of this sub-market's tenants.

Although the overall metro Detroit office market saw little new construction in recent years, the opening in 1993 of the 142,700 square foot Bloom-Wood Office Center represented a major addition of prestige office facilities.

As noted, the average suburban vacancy rate for 1994 was 14.7%. Both the Birmingham (11.2%) and Bloomfield Hills (13.1%) sub-markets vacancy rates were below the reported suburban average. In looking at Table 1, of the 21 office buildings (with reported vacancy rates) listed for both the Birmingham and Bloomfield Hills sub-markets, 13 (62%) had vacancy rates of ten percent or less. However, some (3) facilities reported vacancy rates in excess of 30%.

The average "asking rent" for the suburban market in 1994 was estimated at $18.18. Table 1 indicates a range from $11 to $24 in the Birmingham and Bloomfield markets.

WOODWARD STUDY AREA

Although primarily beyond the boundary of the study area, the "major" office buildings with Woodward Avenue addresses are indicated in Table 1 and on Map 1. Of the some 47 buildings listed, only ten are south of Fourteen Mile Road. Thirteen (13) buildings are listed in Birmingham with some having "downtown" Woodward Avenue addresses. The bulk of the listings (25) are located beyond the northern boundary of Quarton Road (Big Beaver) in Bloomfield Hills and Bloomfield Township.

The main purpose for including the Birmingham/Bloomfield office building sub-market is to demonstrate that, although this sub-market does not rival in size with similar markets in Troy, Southfield or the Detroit CBD, it does represent a significant and growing presence in the Metro Detroit area, Oakland County and the Woodward Avenue Corridor.

As noted earlier, office buildings are relatively few and scattered between Eight Mile and Fourteen Mile on Woodward Avenue. It should also be noted that the listings contained in Table 1 generally reflect what reporting entities consider "major" office buildings (including classes A, B, and C), which does not represent all "office" type facilities in the Study Area. Specifically excluded are the single owner/occupant office facilities (type K), which are distributed throughout the Woodward study area. Also, the cluster of office facilities between Ten Mile and Eleven Mile in both Huntington Woods and Royal Oak are largely omitted from the listings in Table 1. Many of these multi-story and multi-tenant facilities have advertised vacancies, which are not reflected in the data heretofore referenced. The age and class of these facilities, along with the limited number of facilities and location, generally account for the non-inclusion in the reported office market data.

However, the Woodward Avenue Study Area has experienced some office building construction in recent years. Specifically, the Woodward/Catalpa area has seen two multi-story office facilities added in recent years. Other major office facilities are the First of America building (Woodward/Adams) and the Berkley Medical Center (Woodward/12 Mile).

FORECASTS

Key Economic Sectors

In looking at the "Services" sector in Oakland County, it is estimated that it accounts for some 292,706 jobs in 1995. This represents an increase of 42,022 (14.4%) from the 1991 level of 250,684. Forecasts for the year 2000 expect the County's "Service" sector employment to reach 338,906; an increase of 46,200 or 15.8%.

In 1979 the "Service" sector represented 23.2% of Oakland's private sector employment. By 1993 it had grown to a level of 36.4%. Much of the gain in services was in business and professional services, which more than tripled in size between 1979 and 1993. This trend, as noted, is forecast to continue to the year 2000, reaching a level of 40% of all jobs in Oakland County. Thereafter, forecasts for the sector indicate a leveling off, with "Services" continuing to account for two of every five jobs.

The other economic sector that has been mentioned previously as a significant factor in the office building market is "Finance, Insurance and Real Estate." In 1991 it is estimated that this sector had 69,607, or 9.7% of Oakland's total of 716,573. For 1995 it is estimated that its share stands at 9.5% and will slightly decline to 9.4% by the year 2000. It is forecast to remain in the 9.5-10% range thereafter. Despite the relatively stable position of this sector in Oakland's overall employment picture, it will, nevertheless, likely add another 5,000 jobs by the year 2000.

WOODWARD AVENUE CORRIDOR

Although the Woodward Avenue Corridor is probably not destined to become a major office market/center such as Southfield and Troy, due to a variety of factors, it, nevertheless, has recently demonstrated its desirability as an office location. Its central location, ease of access, especially at the nodes at I-696 and Square Lake, make it likely that the Woodward Avenue Study Area will continue to experience selective and "niche" office building development. Other factors which will likely contribute to this potential development include expected growth in the Health Care and service (especially business support services) sectors. Also, existing office and hospital developments are likely to attract and support additional development.

Further absorption of existing vacancies, both in the study area and the nearby major sub-markets of Southfield, Troy and the Birmingham/Bloomfield area, will likely have to take place before the area experiences any new construction activity. However, a continuation of the recent trends of 1993 and 1994 have prompted Grubb & Ellis to note that: "landlords and developers will again start to witness increased levels of interest in new development, investment opportunities and a resurgence of tenants in the market place looking for office space." Continuing, they also noted that with the combination of several factors, including growth in small-to-mid size companies and the anticipated growth in the service industries and declining sublease opportunities, vacancies will reach "extremely low levels." Also cited was the recent growth in the auto industry and related supplier needs for leasing and/or purchasing additional space to handle increased production. In its *1995 Forecast*, Grubb & Ellis noted that: "demand for more technologically advanced facilities is expected to play a more critical role in the site selection process." Further, with few "build-to-suits" in 1994, and no speculative construction planned for 1995, "demand for class A and B office space over 30,000 square feet will eventually exceed market supply."

However, any consideration of office building construction within the Woodward study area in the next 3-5 years must take into account the relatively high vacancy rates in the nearby sub-markets of Southfield and Troy, as well as, the vacancy rates of existing facilities within the study area, especially the 10-11 Mile Road area. In addition, the limited availability of land, its cost and neighboring development are also limiting factors. Nevertheless, the recent office construction within the Study Area bears testimony to the area's potential for such development.

TABLE 1

WOODWARD AVENUE MAJOR OFFICE BUILDINGS

	Building & Address	Year Built	Rent Sq Ft	No. Floors	Occupy %	Rate Sq Ft
	Berkley					
1	Berkley Med Center 1695 W 12 Mile	1950,1991	36,000	2	N/A	$23.00
2	Northpointe Med Plaza Woodward & Catalpa	1989	34,107	3	N/A	$18.50
	Ferndale					
3	Ferndale Center Bldg 22750 Woodward	1929,1950	24,000	3	N/A	$8-10
	Huntington Woods					
4	Huntington Woods Bldg 26657 N Woodward 48070	1970,88	20,000	2	N/A	$16.50
5	Herman Brodsky 26711 Woodward 48070	1964	35,480	3	N/A	N/A
	Birmingham					
6	Maplewood Office Park 600-640 N Woodward 48011	1940	25,000	3	N/A	$18.50
7	350 N Woodward Bldg 350 N Woodward 48009	1985	20,496	3	100%	$22-$22
8	Birmingham Tower 280 N Woodward 48009	1974	81,119	5	90%	$21-$21
9	380 N Woodward Bldg 380 N Woodward 48009	1983	43,902	2	97%	$18.50-$18.50
10	Hunter Park Building 300 Park St 48009	1984	59,047	4	65%	$19.75-$19.75
11	950 N Hunter 950-954 N Hunter 48304	1953	20,300	2	5%	$16-$16
12	Plaza of Birmingham 210 S Woodward 48011	1988	52,000	2	100%	$20-$20
13	Woodward Place 355 S Woodward 48009	1986	77,843	2	83%	$19-$19
14.	Birmingham Place 401 S Woodward 48009	1982	85,000	2	17%	$16.75-$16.75
15	Briggs Building 1115 S Woodward 48009	1929	51,157	1	N/A	N/A
16	Park Plaza 255 S Woodward 48009	1983	50,103	3	100%	$19-$22.50
17	555 Building 555 S Woodward 48009	1972	79,000	8	82%	$20-$20
18	B'field Office Place Bldg 1383 S Woodward 48009	1951	20,433	2	N/A	$11-$16.50

TABLE 1 (Cont'd)

	Building & Address	Year Built	Rent Sq Ft	No. Floors	Occupy %	Rate Sq Ft
	Bloomfield Hills					
19	Stoneridge Off ParK I 2100 N Woodward 48013	1981	160,000	3	83%	$19-$19
20	Stoneridge Off Park II 2050 N Woodward 48013	1984	92,000	4	72%	$18.50-$18.50
21	Stoneridge Off Park III 2000 N Woodwaard 48013	1984	65,791	3	57%	$19-$19
22	Republic Bank Bldg 1700 N Woodward 48304	1966	30,000	3	87%	$19.75-$19.75
23	Bloomwood Centre 1577 N Woodward 48304	1993	144,000	3	96%	$22-$22
24	Bloomfield Center South 1533 N Woodward 48304	1988	137,000	3	90%	$23.50-$24
25	Clausen Building 1520 N Woodward 48013	1965	32,175	2	94%	$14-$17.50
26	Pinehurst 1400 N Woodward 48013	1985	165,000	2	90%	$23-$23
27	Vlasic Building 710 N Woodward 48013	1979	22,562	2	95%	$16-$16
28	Core Building 500 N Woodward 48013	1981	52,144	3	92%	$20-$20
29	Lone Pine Office Bldg 525 N Woodward 48304	1978	77,037	3	92%	$18.50-$18.50
30	Bloomfield Office Center 505 N Woodward 48304	1981	90,000	3	35%	$19-$19
	Bloomfield Township					
31	Manabal Eastawood III 1471 S Woodward 48302	1986,'92	42,000	2	97%	$14.50-$19
32	Manabal Eastwood II 1411 S Woodward 48302	1979	20,000	3	N/A	$13-$16
33	Bloomfield Hills Med Center 1575 Woodward 48013	1977	40,784	2	N/A	N/A
34	Ternes Building 1625 S Woodward 48302	1980	23,000	2	73%	$20-$20
35	Bloomfield Prof Plaza 1695 N or S Woodward	1981	32,771	2	90%	$13.5-$14.5
36	Winthrop Office Plaza 1825 S Woodward 48013	1985	55,000	2	100%	$16-$16
37	Squarewood Medical Bldg 2515 S Woodward 48304	1983	22,467	1	N/A	$13.5-$16.5

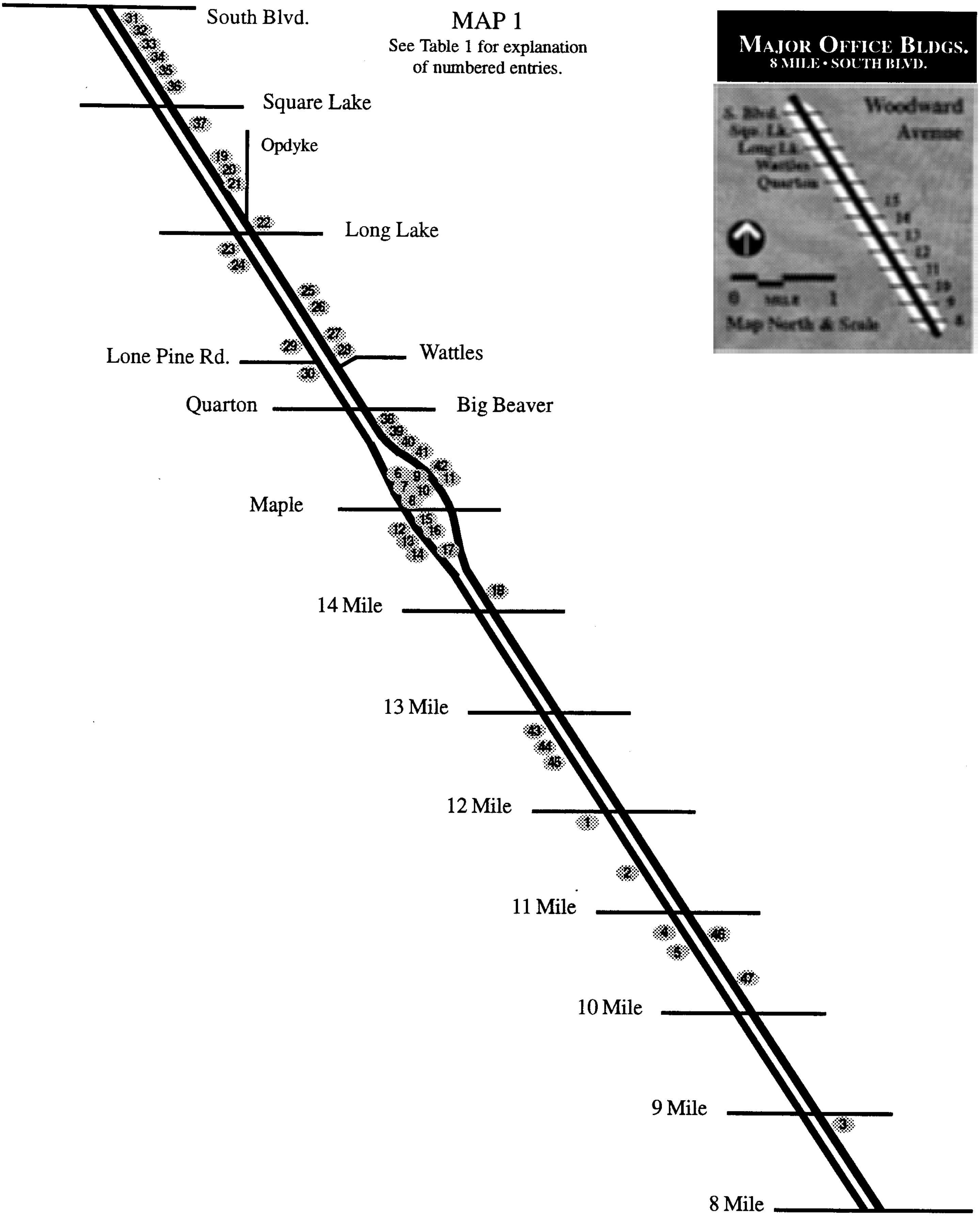
TABLE 1 (Cont'd)

	Building & Address	Year Built	Rent Sq Ft	No. Floors	Occupy %	Rate Sq Ft
38	NBD Building 1600 Woodward 48304	1957	40,000	3	100%	$17-$17
39	1550 N Woodward Building 1550 Woodward 48009	1962	23,355	2	N/A	N/A
40	1550 Woodward Building 1550 Woodward 48009	1966	50,000	3	97%	$18.00
41	1400 N Woodward 1400 N Woodward 48010	1966	54,401	4	47%	$18-$20
	Royal Oak					
43	Wayne-Oakland Bank Bldg 3101 N Woodward 48072	1954	40,000	4	N/A	N/A
44	Merrill Center 3023 N Woodward		20,000	2	N/A	$18.50
45	Kalt Center 2801 Woodward 48072	1989	30,000	3	N/A	$12.5-$18.5
46	Woodward Office Bldg 315 S Woodward 48011	1987	22,000	2	N/A	$18.50
47	1111 Office Building 1111 S Woodward 48067	1968	30,000	2	N/A	$14.25

Sources: Direct Source, Summer 1994
The Hayman Company, Metropolitan Detroit Office Market Summary, Jan., 1995

N/A Denotes data not available

MAP 1
See Table 1 for explanation
of numbered entries.



MARKET ANALYSIS: CHAPTER VII

TRAFFIC VOLUME

Traffic Volume

Purpose of the Chapter

Although traffic and transportation were covered in the previous *Background Report,* it was deemed desirable to further develop this topic. Specifically, although total traffic counts by mile road intersections were reported, it was felt that a detailed analysis of the north/south traffic, particularly for the peak morning and evening rush hours, would yield valuable market data.

BACKGROUND

Woodward Avenue traffic volume, as expressed by average daily trips (ADTs), compiled by SEMCOG, indicates varying volumes by mile road segment. Between Eight Mile and Quarton Road, ADTs vary from a low of 38,332 (between 8-9 Mile) to a high of 63,605 (between Twelve Mile and Coolidge Highway), based on estimated 1992 data.

According to SEMCOG's forecasts, ADTs are expected to increase in all segments of the study area through the year 2015. Rates of growth are expected to vary from a low of 2.3% (Ten Mile - Eleven Mile) to a high of 28% (Haynes - Quarton Road).

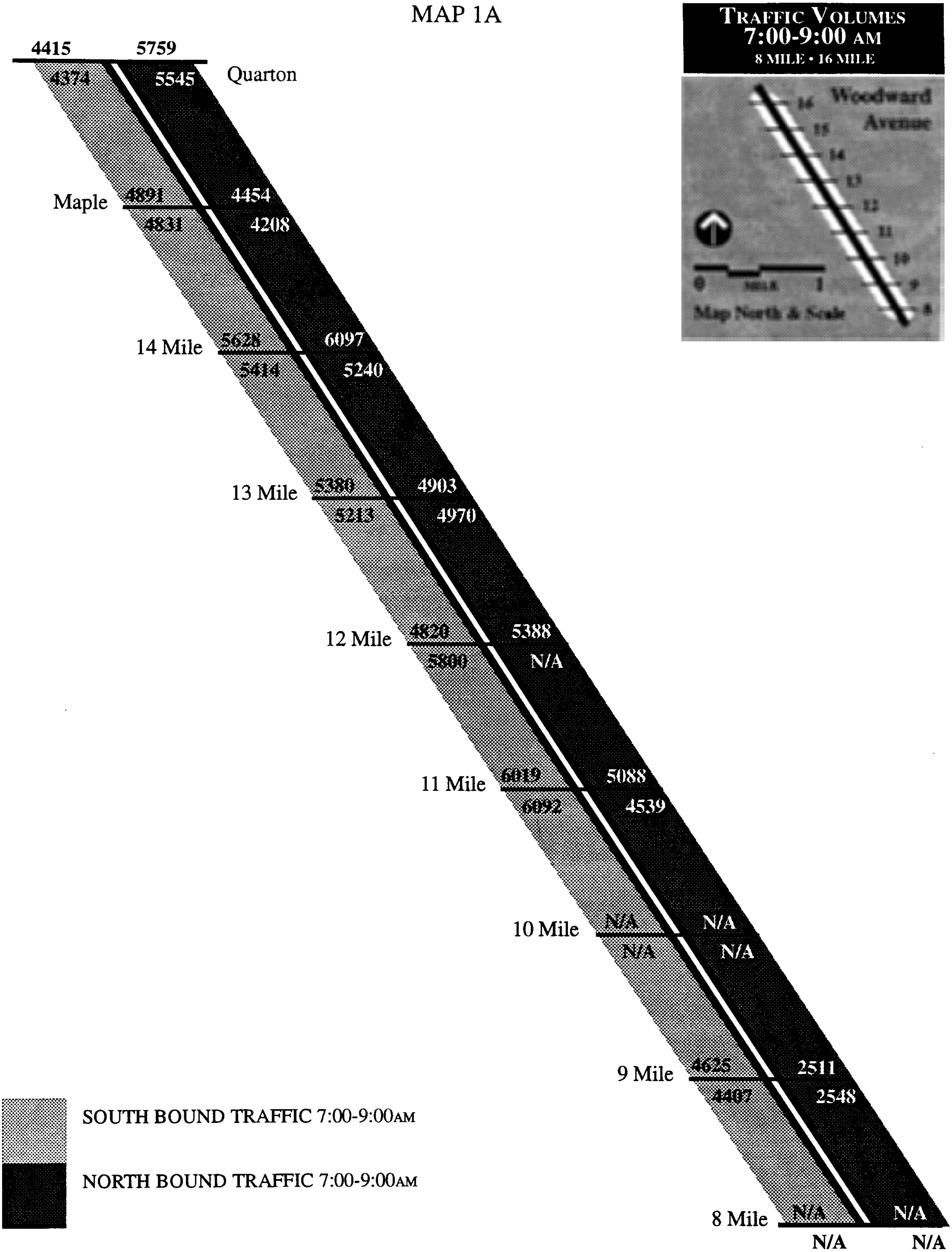
Historically, Woodward Avenue served as a major carrier of daily commuter traffic from Oakland County communities to the Detroit office centers in downtown and the New Center Area. Traffic patterns were largely characterized by morning rush hour traffic headed south, with comparatively lighter traffic headed north. The pattern was reversed subsequently during the evening rush hours.

However, this pattern has shifted in recent years due, in part, to expanded office development in the north Woodward and neighboring areas. With the completion of I-696 in the early 1990s, access to Woodward Avenue has been greatly enhanced for both east and west side residents. The result has been a near equalizing of north and southbound commuter traffic during the rush hours as indicated on Maps 1A and 1B.

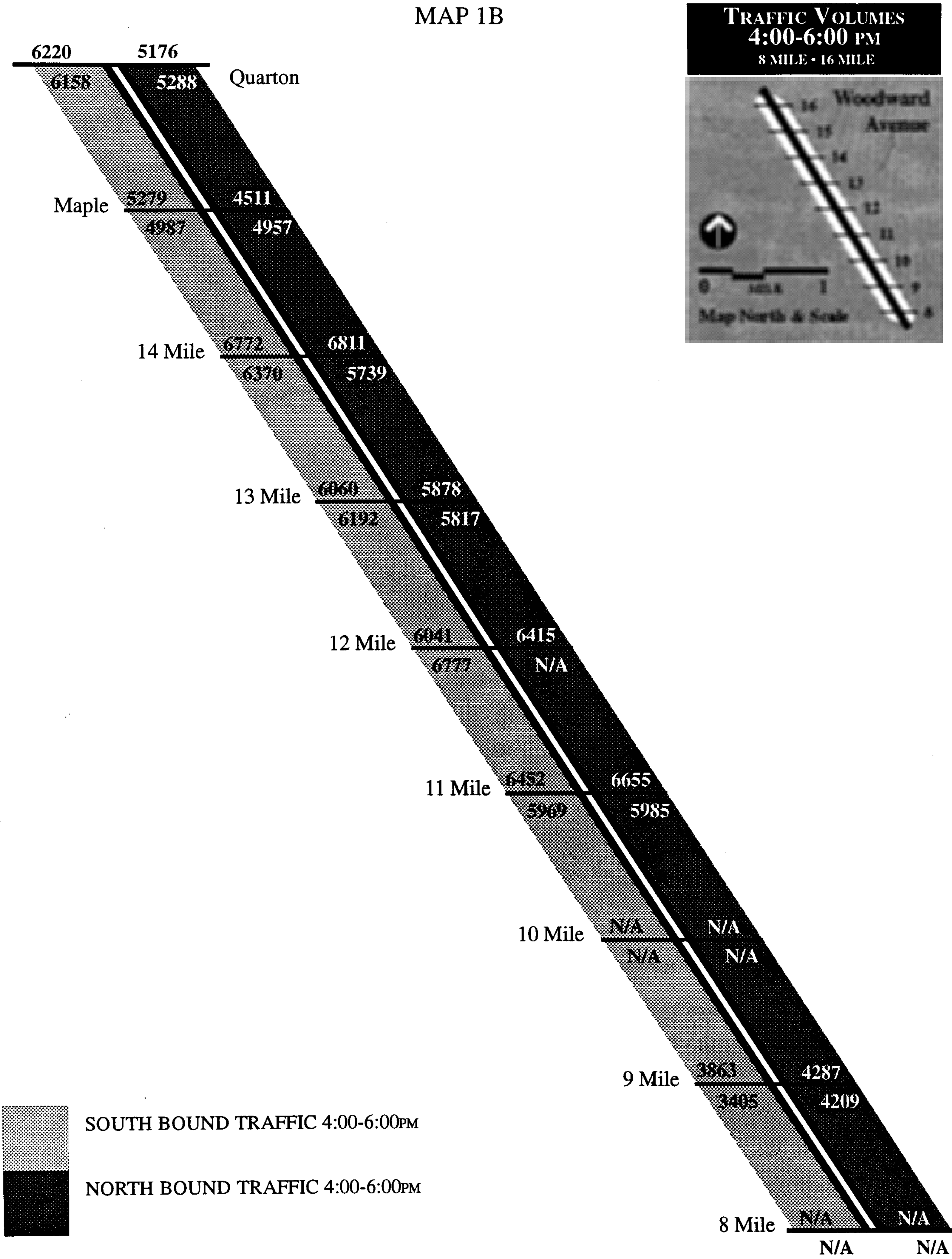
It is interesting to note that the west side of Woodward Avenue has some six dry cleaning establishments (between Quarton Road and Ten Mile) serving, in part, the morning commuter traffic, while only two such establishments exist in the same area on the east side of Woodward Avenue.

From a marketing perspective, the mix of merchants on the east side of Woodward Avenue (serving northbound traffic) should take into account this shift in commuting pattern, as well as, the anticipated growth in traffic volume as anticipated by the SEMCOG forecasts.

MAP 1A


TRAFFIC VOLUMES
7:00-9:00 AM
8 MILE • 16 MILE
Woodward Avenue
Map North & Scale
4415
5759
4374
5545
Quarton
Maple
4891
4454
4831
4208
14 Mile
5628
6097
5414
5240
13 Mile
5380
4903
5213
4970
12 Mile
4820
5388
5800
N/A
11 Mile
6019
5088
6092
4539
10 Mile
N/A
N/A
N/A
N/A
9 Mile
4625
2511
4407
2548
8 Mile
N/A
N/A
N/A
N/A
SOUTH BOUND TRAFFIC 7:00-9:00AM
NORTH BOUND TRAFFIC 7:00-9:00AM

MAP 1B



TRAFFIC VOLUMES
4:00-6:00 PM
8 MILE • 16 MILE
Woodward Avenue
16
15
14
13
12
11
10
9
8
0
MILE
1
Map North & Scale
6220
5176
6158
5288
Quarton
Maple
5279
4511
4987
4957
14 Mile
6772
6811
6370
5739
13 Mile
6060
5878
6192
5817
12 Mile
6041
6415
6777
N/A
11 Mile
6452
6655
5969
5985
10 Mile
N/A
N/A
N/A
N/A
9 Mile
3863
4287
3405
4209
8 Mile
N/A
N/A
N/A
N/A
SOUTH BOUND TRAFFIC 4:00-6:00PM
NORTH BOUND TRAFFIC 4:00-6:00PM

MARKET ANALYSIS: CHAPTER VIII

PERMIT AUTHORIZED CONSTRUCTION

PERMIT AUTHORIZED CONSTRUCTION

Purpose of the Chapter

Permit Authorized Construction data is collected by each local community and reported to the U.S. Bureau of Census, which issues monthly and yearly status reports. These reports contain data on a variety of categories (items), many of which are included in this report.

The tables in this section generally cover permit activity between 1980 and 1994 for selective categories for each of the six participating communities. Where possible, permit activity on Woodward Avenue is included.

Before proceeding, however, two cautionary notes are in order. First, in some instances the data indicates that multiple permits have been issued for a single address. Second, where estimated cost data have been totaled over a period of years, such entries have not been adjusted for inflation. The reader is urged to take these factors into account when reviewing the narrative and accompanying tables.

HOUSING

Table 1 through Table 3 list permit activity in the housing sector for the fifteen year period 1980 - 1994. Data is available for both single family and multi family units for each community.

In looking at the summary data (Tables 3, 3A and 3B), new housing represented approximately $100 million and nearly 1600 units in the six communities over the last fifteen years.

Birmingham (51%) and Royal Oak (38%) accounted for nearly 90% of the total estimated value of housing construction over the 15 year period and approximately 83% of the total units.

However, a review of municipal records and the Woodward Avenue Corridor Study photo files indicates that virtually none of this development occurred on Woodward Avenue. The noted exceptions being the parking, office, apartment complex (#555 building) and Birmingham Place in downtown Birmingham.

RETAIL BUILDING

Tables 4 and 4A list the new retail building permit activity for the 15 year period (1980-1994). Over this time the six cities accounted for 85 buildings, with a combined total estimated cost of $24.6 million.

Ferndale and Royal Oak, each with a reported 36 buildings, accounted for 85% of the total. With respect to total estimated cost, these two communities accounted for nearly 83% of the total, with Royal Oak representing 55.3%, while Ferndale's share was 27.2%.

A detailed review of Ferndale's records between 1984-1994 reveal only two permits issued for new retail facilities on Woodward Avenue (#21400, 1985 - new restaurant) (#22451, 1986 - new building). No dollar values were available.

Royal Oak's records for the peak activity years 1987-1994 were reviewed and only two entries (1988, 1, @ $754,000 and 1990, 1, @ $40,000) were found for Woodward Avenue.

With respect to the City of Berkley, its peak activity years (1987 to 1991, inclusive) were reviewed in detail. Berkley accounted for two Woodward Avenue entries (one each in 1989 and 1991) - the cost/valuation were $650,000 and $1,058,000 respectively.

In summary, of the total of 85 new retail buildings reported, only six were immediately identifiable as having Woodward Avenue addresses. Taking into account the fact that a 100% search was not conducted, the effort is, nevertheless, deemed to be sufficient to conclude that Woodward Avenue was a limited "player" in new retail construction over the last 15 years. It apparently accounted for an estimated 10-15% of permit activity and perhaps a slightly higher percentage (10-20%) of the combined estimated total cost of new retail construction.

A review of the Woodward Avenue photo files and anecdotal observations and recollections tend to highlight the relatively recent "strip" retail developments (i.e. 1989, $650,000), along with the Westborn Market (1991, $1,058,000), on the west side of Woodward in Berkley, as the notable new retail developments. Also of note is the Ferndale Plaza at Nine Mile.

OFFICE BUILDING

A fifteen year (1980-1994) listing of new office building permit activity is contained in Tables 5 and 5A. Overall, this category had a combined total of 75 buildings with an estimated value of $71.3 million.

Of this total, Birmingham (31) and Royal Oak (29) accounted for 60 buildings, or 80% of the total. This translated into 94% of the total estimated cost. The balance of the new office building activity was concentrated in Berkley, which accounted for 12 buildings, with a total estimated cost of $4.1 million.

In attempting to determine how much of this new office building activity took place on Woodward Avenue, peak activity years were identified for the key communities and, where available, municipal records reviewed.

With respect to Royal Oak, data was checked for the peak activity years of 1986-1994, when 27 of its total 29 entries were recorded. Of this total, three entries on Woodward Avenue were identified. Two of these occurred in 1989, with a combined estimated cost of $1,038,025, and one was recorded in 1990, with a $636,800 cost.

Huntington Woods' activity in 1988 and 1989 concerned a single property on Woodward Avenue, with a combined permit cost of $276,200.

The Northpointe Medical Center office building is a relatively recent and major addition to Woodward Avenue in the City of Berkley. A review of the City's records revealed several permits issued between 1992 and 1994, with a combined total cost of approximately $2.3 million. The City does not maintain records before 1992 except for items over $500,000. In addition, no data was available for 1988 and 1990.

A detailed review of Birmingham's records for peak activity years turned up only two (2) office building entries. Both were recorded in 1991 with a combined value of $3.5 million. Thus, it appears that, although Birmingham accounted for the greatest number of new office buildings, very little of this activity took place on the Woodward Avenue/Hunter Boulevard segment within the Study Area.

PARKING

Tables 6 and 6A list permit activity issued for parking facilities in each of the six participating communities over the ten year period 1985-1994. A combined total of 74 parking facilities, with an estimated total cost of approximately $963,000, is revealed.

The communities with the greatest activity in this category were Ferndale, with 51 entries or 69% of the total, and Berkley with 10 entries accounting for 13.5% of the total.

A detailed review of Ferndale's permit activity on Woodward Avenue between 1984 and 1994 revealed only one parking facility permit issued in 1987 (at #21203 Woodward Avenue).

Berkley's permit activity (9) was concentrated in 1985. However, details were not available. Berkley did, however, issue a parking facility permit in 1994 with an estimated cost of $10,000 for a Woodward Avenue location.

DEMOLITIONS

This category was included in the permit analysis for two reasons. First, it was envisioned that the amount of demolitions (especially item #649) on Woodward Avenue would be identifiable. Second, it was hoped that the subsequent use, especially for parking and new construction, would also be identifiable.

Table 7 presents community-wide demolition permits issued for the years 1980-1994. The investigation focused on item #649, demolitions involving "all other structures." For all communities, with the exception of Pleasant Ridge which had very few entries, peak activity years were selected.

In attempting to determine how much of the demolition activity occurred on Woodward Avenue during the peak years, in the respective communities, several difficulties were encountered. Record keeping varies by community and formats have changed over the years.

In Ferndale, Woodward Avenue permit data was isolated and demolition addresses were checked against the project's inventory database. Only eleven demolition permits were identified over the time span 1984-1994. Subsequent site reuse was able to be determined in three instances, all of which fall within the fast-food restaurant category.

Demolition permit data for the remaining communities was either not available, not available for particular years or contained in a general file, which would require a commitment of staff time deemed best applied elsewhere on the project.

ADDITIONS, ALTERATIONS & CONVERSIONS

Of all the permit authorized construction categories selected for review, this category accounted for the greatest combined number of permits issued and highest estimated cost during the 15 year period 1980-1994. Specifically, a combined total of 1,682 permits were issued representing a total estimated cost of nearly $111 million. It is also noteworthy that, although activity and estimated cost varied by community and from year to year, the reported data tends to suggest year-to-year uniformity of activity, especially in Berkley, Birmingham and Ferndale.

Over the time period under review, Royal Oak accounted for 736 (43.8%) of the total permits issued and more than $74 million (67%) of the combined total estimated cost. Other major contributions were made by Birmingham with 442 (26.3%) permits valued at $16.2 million (14.6%) and Ferndale with 402 (23.9%) with an estimated cost of $17.6 million or 15.8% of the total.

A detailed review of Ferndale's permit activity for the eleven year period, 1984-1994, revealed that 280 permits (of a total of 402) were issued in this category for Woodward Avenue addresses. During the same period the City issued a total of 489 permits for all categories, except housing and demolitions, covered in this analysis. Thus, it appears that both this category and Woodward Avenue figured prominently in Ferndale's overall permit activity over the past fifteen years.

The nature of the permits issued for Woodward Avenue addresses is characterized by "awnings," "interior renovations," "outdoor signage" and other interior work such as plumbing, electrical, heating, air-conditioning and code-violation corrections. Approximately 105 (38%) of the 280 Woodward Avenue entries were classified as either "sign" or "awning." In part, this is a reflection of business turnover and upgrading of facilities.

CONCLUSION

In summary, the accompanying tables present a substantially complete picture of the construction and remodeling related activities for the six participating cities, in key activity (item #) areas over the last 10 to 15 years. However, the aforementioned variety of recordkeeping systems, at the respective local governments, precluded the generation of an equally detailed data subset for the Woodward Avenue Corridor Study Area. Available data was used along with the Study's photo file and anecdotal information gathered from local officials and staff.

Although these six communities and Woodward Avenue can generally be characterized as fully developed, the data suggests that both the cities and the Corridor experienced a fair amount of change over the past 10 to 15 years. During this period the combined total estimated cost/value of permits issued, in all categories, except demolitions, amounted to over $306 million (unadjusted for inflation).

Of this total "Alterations, Additions and Conversions" accounted for nearly $111 million, or 36% of the total. This large share seems to be consistent with the built-up nature of the area. It also appears that Woodward Avenue was a major area of activity. As noted, awnings, interior renovations, outdoor signage and other interior work such as plumbing, electrical, heating, air-conditioning and code-violation corrections, are representative of the details of this category of investment/expenditure on Woodward Avenue. Although no data was readily available, it seems reasonable to indicate that some significant portion of this activity, and investment, resulted from business turnovers, new business starts and facility upgrades.

Not surprisingly, the category of housing accounted for a combined total of approximately $99 million (32%) with little, if any, of this activity taking place on Woodward Avenue, with the exception of the Woodward/Hunter area in Birmingham.

The Office Building category embraced some $71 million (23%) of new investment in the six communities. This category was dominated by the cities of Birmingham and Royal Oak and, to a lesser extent, Berkley. However, the Woodward Avenue Corridor Study Area does not appear to have been a major center of activity. Of the 75 buildings listed over the past fifteen years, fewer than ten appear to have been located on Woodward Avenue. This observation also includes any office development in downtown Birmingham situated between Woodward Avenue and Hunter Boulevard. Anecdotal observations indicate that this area has been the site of considerable activity, including office construction during the past fifteen years.

The new office buildings constructed on Woodward Avenue in the past 15 years are relatively few and modest in size, when compared to office building activity in the Troy and Southfield submarkets. They, nevertheless, represent a significant impact on the respective communities and the Corridor, especially, the aforementioned First of America building in Birmingham and the Northpointe Medical Center building in Berkley.

With respect to new retail Building Construction, the six communities accounted for only $25 million (85 buildings) over the last 15 years. Again, fewer than 10 new buildings and/or retail strip malls were attributed to Woodward Avenue during this span of time. However, the impact of these new facilities contributed significantly to changing the "face" of Woodward Avenue. Worthy of special mention are the Westborn Market and the relatively new strip mall developments in Berkley. The Ferndale Plaza (Ferndale) and Piety Hill complex (Birmingham) also merit special mention. Finally, it should be noted that, over the years and especially on the east side of Woodward Avenue in Royal Oak, many larger "footprint" retail facilities have replaced smaller ones. This has also changed the density and look of the Avenue in certain areas. This process of retail development has also been accompanied by additional on-site parking.

As noted earlier, the categories of demolitions and parking were included in this investigation, in part, due to the generally accepted "parking problem" that exists in the Study Area. However, the data yielded less than five entries (of a total 74) on Woodward Avenue. Similarly, the data did not indicate any linkage between demolitions being undertaken for the purpose of providing parking facilities. A review of the photo files and anecdotal observations tend to indicate that such activity has taken place. It has also changed the density and appearance of Woodward Avenue over the past decade.

In conclusion, the Woodward Avenue Corridor Study Area has been a center of investment activity, albeit limited and varying by category, over the past 10-15 years. This development and investment activity appears to have been justified and sustained by location and market factors. No evidence has been revealed that would indicate that these factors will not remain favorable for the foreseeable future.

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TABLE 1

WOODWARD AVENUE CORRIDOR STUDY
PERMIT AUTHORIZED CONSTRUCTION - SINGLE FAMILY HOUSING (Item #101)
1980 - 1994
by participating cities

BERKLEY

	Units	Cost
1980		
1981	4	$216,000
1982	0	$0
1983	2	$70,000
1984	4	$145,000
1985	4	$180,000
1986	7	$315,445
1987	4	$132,000
1988	6	$314,000
1989	4	$271,000
1990	1	$50,000
1991	14	$910,500
1992	9	$643,000
1993	12	$733,369
1994	12	$718,150
Total	**83**	**$4,698,464**

BIRMINGHAM

	Units	Cost
1980		
1981	14	$1,462,418
1982	2	$275,332
1983	3	$260,400
1984	19	$1,658,957
1985	33	$3,509,802
1986	32	$2,889,023
1987	29	$2,924,244
1988	32	$3,057,364
1989	30	$2,971,534
1990	38	$4,637,244
1991	20	$2,139,952
1992	15	$1,546,665
1993	23	$2,463,293
1994	20	$2,233,298
Total	**310**	**$32,029,526**

FERNDALE

	Units	Cost
1980		
1981	2	$34,600
1982	0	$0
1983	0	$0
1984	1	$35,000
1985	0	$0
1986	0	$0
1987	0	$0
1988	0	$0
1989	0	$0
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**3**	**$69,600**

HUNTINGTON WOODS

	Units	Cost
1980		
1981	0	$0
1982	0	$0
1983	0	$0
1984	0	$0
1985	1	$70,000
1986	1	$80,000
1987	0	$0
1988	3	$310,000
1989	1	$80,000
1990	1	$160,000
1991	1	$120,000
1992	2	$295,000
1993	0	$0
1994	0	$0
Total	**10**	**$1,115,000**

PLEASANT RIDGE

	Units	Cost
1980		
1981	0	$0
1982	1	$50,000
1983	2	$75,188
1984	3	$137,764
1985	1	$45,921
1986	1	$60,000
1987	1	$60,000
1988	2	$172,000
1989	0	$0
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**11**	**$600,873**

ROYAL OAK

	Units	Cost
1980		
1981	13	$604,700
1982	14	$530,500
1983	34	$1,470,690
1984	24	$1,059,440
1985	10	$442,626
1986	8	$386,374
1987	19	$1,068,914
1988	27	$2,043,200
1989	14	$941,276
1990	11	$716,950
1991	10	$735,400
1992	12	$712,165
1993	26	$1,830,000
1994	17	$1,128,384
Total	**239**	**$13,670,619**

Source: U.S. Bureau of Census.

TABLE 1A

WOODWARD AVENUE CORRIDOR STUDY
PERMIT AUTHORIZED CONSTRUCTION - SINGLE FAMILY HOUSING - SUMMARY (Item #101)
1980 - 1994
by participating cities

PARTICIPATING CITIES	UNITS	COST
BERKLEY	83	$4,698,464
BIRMINGHAM	310	$32,029,526
FERNDALE	3	$69,600
HUNTINGTON WOODS	10	$1,115,000
PLEASANT RIDGE	11	$600,873
ROYAL OAK	239	$13,670,619
TOTAL	**656**	**$52,184,082**

Source: U.S. Bureau of Census.

TABLE 2

WOODWARD AVENUE CORRIDOR STUDY
PERMIT AUTHORIZED CONSTRUCTION - MULTIPLE FAMILY HOUSING (Item #103,4,5)
1980 - 1994
by participating cities

BERKLEY

	Units	Cost
1980		
1981	0	$0
1982	0	$0
1983	0	$0
1984	12	$240,000
1985	0	$0
1986	8	$135,000
1987	0	$0
1988	10	$300,000
1989	10	$400,000
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**40**	**$1,075,000**

BIRMINGHAM

	Units	Cost
1980		
1981	180	$14,942,316
1982	17	$1,089,293
1983	0	$0
1984	17	$825,293
1985	5	$320,000
1986	5	$233,398
1987	10	$466,796
1988	5	$233,398
1989	0	$0
1990	0	$0
1991	0	$0
1992	0	$0
1993	11	$431,387
1994	0	$0
Total	**250**	**$18,541,881**

FERNDALE

	Units	Cost
1980		
1981	70	$2,200,000
1982	60	$1,400,000
1983	0	$0
1984	0	$0
1985	0	$0
1986	0	$0
1987	0	$0
1988	0	$0
1989	0	$0
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**130**	**$3,600,000**

HUNTINGTON WOODS

	Units	Cost
1980		
1981	0	$0
1982	0	$0
1983	0	$0
1984	0	$0
1985	0	$0
1986	0	$0
1987	0	$0
1988	0	$0
1989	0	$0
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**0**	**$0**

PLEASANT RIDGE

	Units	Cost
1980		
1981	0	$0
1982	0	$0
1983	0	$0
1984	0	$0
1985	0	$0
1986	0	$0
1987	0	$0
1988	0	$0
1989	0	$0
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**0**	**$0**

ROYAL OAK

	Units	Cost
1980		
1981	10	$343,000
1982	212	$7,133,000
1983	19	$636,744
1984	3	$63,000
1985	0	$0
1986	54	$2,056,001
1987	4	$224,000
1988	19	$821,000
1989	35	$1,700,500
1990	18	$967,000
1991	5	$400,000
1992	0	$0
1993	120	$7,928,000
1994	21	$1,377,830
Total	**520**	**$23,650,075**

Source: U.S. Bureau of Census.

TABLE 2A

WOODWARD AVENUE CORRIDOR STUDY
PERMIT AUTHORIZED CONSTRUCTION - MULTIPLE FAMILY HOUSING - SUMMARY (Item #103,4,5)
1980 - 1994
by participating cities

PARTICIPATING CITIES	UNITS	COST
BERKLEY	40	$1,075,000
BIRMINGHAM	250	$18,541,881
FERNDALE	130	$3,600,000
HUNTINGTON WOODS	0	$0
PLEASANT RIDGE	0	$0
ROYAL OAK	520	$23,650,075
TOTAL	**940**	**$46,866,956**

Source: U.S. Bureau of Census.

TABLE 3

WOODWARD AVENUE CORRIDOR STUDY
PERMIT AUTHORIZED CONSTRUCTION - TOTAL HOUSING (Item #109)
1980 - 1994
by participating cities

BERKLEY

	Units	Cost
1980		
1981	4	$216,000
1982	0	$0
1983	2	$70,000
1984	16	$385,000
1985	4	$180,000
1986	15	$450,445
1987	4	$132,000
1988	16	$614,000
1989	14	$671,000
1990	1	$50,000
1991	14	$910,500
1992	9	$643,000
1993	12	$733,369
1994	12	$718,150
Total	**123**	**$5,773,464**

BIRMINGHAM

	Units	Cost
1980		
1981	194	$16,404,734
1982	19	$1,364,625
1983	3	$260,400
1984	36	$2,484,250
1985	38	$3,829,802
1986	37	$3,122,421
1987	39	$3,391,040
1988	37	$3,290,762
1989	30	$2,971,534
1990	38	$4,637,244
1991	20	$2,139,952
1992	15	$1,546,665
1993	34	$2,894,680
1994	20	$2,233,298
Total	**560**	**$50,571,407**

FERNDALE

	Units	Cost
1980		
1981	72	$2,234,600
1982	60	$1,400,000
1983	0	$0
1984	1	$35,000
1985	0	$0
1986	0	$0
1987	0	$0
1988	0	$0
1989	0	$0
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**133**	**$3,669,600**

HUNTINGTON WOODS

	Units	Cost
1980		
1981	0	$0
1982	0	$0
1983	0	$0
1984	0	$0
1985	1	$70,000
1986	1	$80,000
1987	0	$0
1988	3	$310,000
1989	1	$80,000
1990	1	$160,000
1991	1	$120,000
1992	2	$295,000
1993	0	$0
1994	0	$0
Total	**10**	**$1,115,000**

PLEASANT RIDGE

	Units	Cost
1980		
1981	0	$0
1982	1	$50,000
1983	2	$75,188
1984	3	$137,764
1985	1	$45,921
1986	1	$60,000
1987	1	$60,000
1988	2	$172,000
1989	0	$0
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**11**	**$428,873**

ROYAL OAK

	Units	Cost
1980		
1981	23	$947,700
1982	226	$7,663,500
1983	53	$2,107,434
1984	27	$1,122,440
1985	10	$442,626
1986	62	$2,442,375
1987	23	$1,292,914
1988	46	$2,864,200
1989	49	$2,641,776
1990	29	$1,683,950
1991	15	$1,135,400
1992	12	$712,165
1993	146	$9,758,000
1994	38	$2,506,214
Total	**759**	**$37,320,694**

Source: U.S. Bureau Census.

TABLE 3A

WOODWARD AVENUE CORRIDOR STUDY
PERMIT AUTHORIZED CONSTRUCTION - TOTAL HOUSING - SUMMARY (Item #109)
1980 - 1994
by participating cities

PARTICIPATING CITIES	UNITS	COST
BERKLEY	123	$5,773,464
BIRMINGHAM	560	$50,571,407
FERNDALE	133	$3,669,600
HUNTINGTON WOODS	10	$1,115,000
PLEASANT RIDGE	11	$428,873
ROYAL OAK	759	$37,320,694
TOTAL	**1596**	**$98,879,038**

Source: U.S. Bureau of Census.

TABLE 3B

WOODWARD AVENUE CORRIDOR STUDY
PERMIT AUTHORIZED CONSTRUCTION - TOTAL HOUSING - GROUP SUMMARY (Item #109)
1980 - 1994.
by participating cities

	SINGLE FAMILY HOUSING 1980 - 1994		MULTIPLE FAMILY HOUSING 1980 - 1994		TOTAL FAMILY HOUSING 1980 - 1994	
PARTICIPATING CITIES	**UNITS**	**COST**	**UNITS**	**COST**	**UNITS**	**COST**
BERKLEY	83	$4,698,464	40	$1,075,000	123	$5,773,464
BIRMINGHAM	310	$32,029,526	250	$18,541,881	560	$50,571,407
FERNDALE	3	$69,600	130	$3,600,000	133	$3,669,600
HUNTINGTON WOODS	10	$1,115,000	0	$0	10	$1,115,000
PLEASANT RIDGE	11	$600,873	0	$0	11	$428,873
ROYAL OAK	239	$13,670,619	520	$23,650,075	759	$37,320,694
TOTAL	**656**	**$52,184,082**	**940**	**$46,866,956**	**1596**	**$98,879,038**

Source: U.S. Bureau of Census

TABLE 4

WOODWARD AVENUE CORRIDOR STUDY
PERMIT AUTHORIZED CONSTRUCTION - RETAIL BUILDINGS (Item #327)
1980 - 1994
by participating cities

BERKLEY

	Buidings	Cost
1980		
1981	0	$0
1982	0	$0
1983	0	$0
1984	1	$130,000
1985	0	$0
1986	0	$0
1987	1	$842,000
1988	1	$54,000
1989	1	$650,000
1990	1	$40,000
1991	1	$1,058,000
1992	0	$0
1993	0	$0
1994	0	$0
Total	**6**	**$2,774,000**

BIRMINGHAM

	Buildings	Cost
1980		
1981	1	$75,000
1982	0	$0
1983	0	$0
1984	0	$0
1985	0	$0
1986	0	$0
1987	3	$446,000
1988	0	$0
1989	1	$148,666
1990	2	$815,143
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**7**	**$1,484,809**

FERNDALE

	Buildings	Cost
1980		
1981	1	$200,000
1982	1	$175,000
1983	3	$1,378,600
1984	3	$549,900
1985	5	$1,066,000
1986	5	$429,500
1987	6	$642,700
1988	6	$621,480
1989	6	$1,677,792
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**36**	**$6,740,972**

HUNTINGTON WOODS

	Buildings	Cost
1980		
1981	0	$0
1982	0	$0
1983	0	$0
1984	0	$0
1985	0	$0
1986	0	$0
1987	0	$0
1988	0	$0
1989	0	$0
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**0**	**$0**

PLEASANT RIDGE

	Buildings	Cost
1980		
1981	0	$0
1982	0	$0
1983	0	$0
1984	0	$0
1985	0	$0
1986	0	$0
1987	0	$0
1988	0	$0
1989	0	$0
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**0**	**$0**

ROYAL OAK

	Buildings	Cost
1980		
1981	3	$118,000
1982	2	$309,000
1983	1	$188,891
1984	0	$0
1985	0	$0
1986	2	$532,500
1987	7	$5,085,676
1988	10	$2,520,000
1989	5	$2,940,000
1990	1	$40,000
1991	0	$0
1992	2	$883,000
1993	1	$350,000
1994	2	$603,970
Total	**36**	**$13,571,037**

Source: U.S. Bureau of Census.

TABLE 4A

WOODWARD AVENUE CORRIDOR STUDY
PERMIT AUTHORIZED CONSTRUCTION - RETAIL BUILDINGS - SUMMARY (Item #327)
1980 - 1994
by participating cities

PARTICIPATING CITIES	BUILDINGS	COST
BERKLEY	6	$2,774,000
BIRMINGHAM	7	$1,484,809
FERNDALE	36	$6,740,972
HUNTINGTON WOODS	0	$0
PLEASANT RIDGE	0	$0
ROYAL OAK	36	$13,571,037
TOTAL	**85**	**$24,570,818**

Source: U.S. Bureau of Census.

TABLE 5

WOODWARD AVENUE CORRIDOR STUDY
PERMIT AUTHORIZED CONSTRUCTION - OFFICE BUILDINGS (Item #324)
1980 - 1994
by participating cities

BERKLEY

	Buildings	Cost
1980		
1981	2	$154,000
1982	1	$20,000
1983	0	$0
1984	0	$0
1985	4	$735,000
1986	0	$0
1987	1	$275,000
1988	0	$0
1989	2	$2,800,000
1990	0	$0
1991	0	$0
1992	1	$11,400
1993	1	$110,273
1994	0	$0
Total	**12**	**$4,105,673**

BIRMINGHAM

	Buildings	Cost
1980		
1981	2	$6,621,460
1982	0	$0
1983	1	$2,039,000
1984	2	$1,056,226
1985	4	$3,185,599
1986	4	$4,943,714
1987	6	$4,420,601
1988	5	$4,682,154
1989	6	$4,774,036
1990	1	$3,487,411
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**31**	**$35,210,201**

FERNDALE

	Buildings	Cost
1980		
1981	0	$0
1982	0	$0
1983	0	$0
1984	0	$0
1985	0	$0
1986	0	$0
1987	0	$0
1988	0	$0
1989	0	$0
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**0**	**$0**

HUNTINGTON WOODS

	Buildings	Cost
1980		
1981	0	$0
1982	0	$0
1983	0	$0
1984	0	$0
1985	1	$16,500
1986	0	$0
1987	0	$0
1988	1	$250,000
1989	1	$26,200
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**3**	**$292,700**

PLEASANT RIDGE

	Buildings	Cost
1980		
1981	0	$0
1982	0	$0
1983	0	$0
1984	0	$0
1985	0	$0
1986	0	$0
1987	0	$0
1988	0	$0
1989	0	$0
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**0**	**$0**

ROYAL OAK

	Buildings	Cost
1980		
1981	1	$112,000
1982	1	$272,000
1983	0	$0
1984	0	$0
1985	0	$0
1986	4	$1,519,000
1987	6	$1,585,000
1988	2	$960,000
1989	5	$7,449,025
1990	3	$14,636,800
1991	0	$0
1992	2	$3,300,000
1993	2	$50,000
1994	3	$1,831,343
Total	**29**	**$31,715,168**

Source: U.S. Bureau of Census.

TABLE 5A

WOODWARD AVENUE CORRIDOR STUDY
PERMIT AUTHORIZED CONSTRUCTION - OFFICE BUILDINGS - SUMMARY (Item #324)
1980 - 1994
by participating cities

PARTICIPATING CITIES	BUILDINGS	COST
BERKLEY	12	$4,105,673
BIRMINGHAM	31	$35,210,201
FERNDALE	0	$0
HUNTINGTON WOODS	3	$292,700
PLEASANT RIDGE	0	$0
ROYAL OAK	29	$31,715,168
TOTAL	**75**	**$71,323,742**

TABLE 6

WOODWARD AVENUE CORRIDOR STUDY
PERMIT AUTHORIZED CONSTRUCTION - PARKING (Item #329)
1985 - 1994
by participating cities

BERKLEY

	Buidings	Cost
1985	9	$18,951
1986	0	$0
1987	0	$0
1988	0	$0
1989	0	$0
1990	0	$0
1991	0	$0
1992	0	$0
1993	1	$180,000
1994	0	$0
Total	**10**	**$198,951**

BIRMINGHAM

	Buildings	Cost
1985	0	$0
1986	0	$0
1987	2	$14,000
1988	2	$14,000
1989	1	$10,410
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**5**	**$38,410**

FERNDALE

	Buildings	Cost
1985	8	$12,891
1986	8	$56,477
1987	7	$43,965
1988	7	$44,739
1989	6	$58,330
1990	5	$52,860
1991	3	$33,438
1992	2	$21,602
1993	2	$21,674
1994	3	$32,655
Total	**51**	**$378,631**

HUNTINGTON WOODS

	Buildings	Cost
1985	1	$105,000
1986	0	$0
1987	1	$18,000
1988	0	$0
1989	1	$1,000
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**3**	**$124,000**

PLEASANT RIDGE

	Buildings	Cost
1985	0	$0
1986	0	$0
1987	0	$0
1988	0	$0
1989	0	$0
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**0**	**$0**

ROYAL OAK

	Buildings	Cost
1985	0	$0
1986	1	$84,000
1987	1	$112,000
1988	0	$0
1989	1	$15,000
1990	0	$0
1991	0	$0
1992	0	$0
1993	1	$7,000
1994	1	$5,000
Total	**5**	**$223,000**

Source: U.S. Bureau of Census.

TABLE 6A

WOODWARD AVENUE CORRIDOR STUDY
PERMIT AUTHORIZED CONSTRUCTION - PARKING - SUMMARY (Item #329)
1985 - 1994
by participating cities

PARTICIPATING CITIES	BUILDINGS	COST
BERKLEY	10	$198,951
BIRMINGHAM	5	$38,410
FERNDALE	51	$378,631
HUNTINGTON WOODS	3	$124,000
PLEASANT RIDGE	0	$0
ROYAL OAK	5	$223,000
TOTAL	**74**	**$962,992**

Source: U.S. Bureau of Census.

TABLE 7

WOODWARD AVENUE CORRIDOR STUDY
PERMIT AUTHORIZED CONSTRUCTION - DEMOLITIONS (Item #645, 646, 648, 649)
1980 - 1994
by participating cities

BERKLEY

	single family houses #645	two family houses #646	5 or more family houses #648	all other structures #649
1980				
1981	1	0	0	0
1982	1	0	0	0
1983	0	0	0	0
1984	0	0	0	3
1985	1	0	0	0
1986	0	0	0	0
1987	0	0	0	4
1988	4	0	0	4
1989	0	0	0	8
1990	1	0	0	1
1991	5	0	0	2
1992	2	0	0	0
1993	2	0	0	0
1994	1	0	0	0
Total	18	0	0	22

BIRMINGHAM

	single family houses #645	two family houses #646	5 or more family houses #648	all other structures #649
1980				
1981	1	0	0	8
1982	0	0	0	4
1983	1	0	0	1
1984	2	0	0	2
1985	5	0	0	2
1986	7	0	0	3
1987	7	0	0	1
1988	6	0	0	4
1989	6	0	0	3
1990	12	0	0	2
1991	22	0	0	12
1992	6	0	0	14
1993	12	0	18	25
1994	14	0	1	17
Total	101	0	19	98

FERNDALE

	single family houses #645	two family houses #646	5 or more family houses #648	all other structures #649
1980				
1981	5	0	0	0
1982	4	0	5	4
1983	6	0	0	3
1984	4	0	0	3
1985	10	0	0	2
1986	12	0	0	8
1987	11	0	0	7
1988	12	0	0	12
1989	11	0	0	7
1990	12	0	0	7
1991	11	0	0	5
1992	12	0	0	5
1993	12	0	0	7
1994	12	0	0	8
Total	134	0	5	78

HUNTINGTON WOODS

	single family houses #645	two family houses #646	5 or more family houses #648	all other structures #649
1980				
1981	0	0	0	0
1982	2	0	0	4
1983	13	0	0	2
1984	0	0	0	1
1985	0	0	0	0
1986	0	0	0	0
1987	0	0	0	2
1988	0	0	0	0
1989	0	0	0	3
1990	0	0	0	3
1991	0	0	0	6
1992	0	0	0	0
1993	0	0	0	0
1994	0	0	0	0
Total	15	0	0	21

PLEASANT RIDGE

	single family houses #645	two family houses #646	5 or more family houses #648	all other structures #649
1980				
1981	2	0	0	0
1982	10	0	0	0
1983	7	0	0	0
1984	0	0	0	0
1985	5	0	0	0
1986	0	0	0	0
1987	2	0	0	2
1988	0	0	0	2
1989	0	0	0	0
1990	0	0	0	2
1991	0	0	0	0
1992	0	0	0	0
1993	0	0	0	0
1994	0	0	0	0
Total	26	0	0	6

ROYAL OAK

	single family houses #645	two family houses #646	5 or more family houses #648	all other structures #649
1980				
1981	12	0	0	6
1982	19	0	0	3
1983	0	0	0	0
1984	0	0	0	0
1985	0	0	0	0
1986	11	0	0	6
1987	7	0	0	6
1988	5	0	0	3
1989	14	2	0	7
1990	9	0	0	5
1991	3	0	0	6
1992	3	0	0	2
1993	10	0	0	13
1994	9	0	0	6
Total	102	2	0	63

Source: U.S. Bureau of Census.

TABLE 7A

WOODWARD AVENUE CORRIDOR STUDY
PERMIT AUTHORIZED CONSTRUCTION - DEMOLITIONS - SUMMARY (Item 645,6, 648,9)
1980 - 1994
by participating cities

PARTICIPATING CITIES	SINGLE FAMILY HOUSES	TWO FAMILY HOUSES	5 OR MORE FAMILY HOUSES	ALL OTHER STRUCTURES
BERKLEY	18	0	0	22
BIRMINGHAM	101	0	19	98
FERNDALE	134	0	5	78
HUNTINGTON WOODS	15	0	0	21
PLEASANT RIDGE	26	0	0	6
ROYAL OAK	102	2	0	63
TOTAL	**396**	**2**	**24**	**288**

Source: U.S. Bureau of Census.

TABLE 8

WOODWARD AVENUE CORRIDOR STUDY
PERMIT AUTHORIZED CONSTRUCTION - ADDITIONS, ALTERATIONS & CONVERSIONS **(Item #437)**
1980 - 1994
by participating cities

BERKLEY

	Bldgs	Cost
1980	n/a	
1981	n/a	
1982	n/a	
1983	n/a	
1984	n/a	
1985	1	$250
1986	5	$35,974
1987	5	$91,700
1988	9	$209,950
1989	3	$111,000
1990	10	$423,000
1991	13	$265,500
1992	10	$294,685
1993	12	$547,360
1994	10	$146,600
Total	**78**	**$2,126,019**

BIRMINGHAM

	Bldgs	Cost
1980	n/a	
1981	n/a	
1982	n/a	
1983	n/a	
1984	n/a	
1985	83	$1,117,246
1986	32	$483,893
1987	20	$302,428
1988	23	$347,786
1989	26	$1,145,375
1990	73	$2,381,028
1991	47	$2,337,636
1992	56	$3,196,112
1993	34	$1,975,596
1994	48	$2,904,931
Total	**442**	**$16,192,031**

FERNDALE

	Bldgs	Cost
1980	n/a	
1981	n/a	
1982	n/a	
1983	n/a	
1984	n/a	
1985	36	$1,046,696
1986	42	$843,616
1987	36	$812,104
1988	39	$857,523
1989	40	$1,768,770
1990	40	$2,262,940
1991	43	$2,550,884
1992	43	$2,467,183
1993	42	$2,451,734
1994	41	$2,483,699
Total	**402**	**$17,545,149**

HUNTINGTON WOODS

	Bldgs	Cost
1980	n/a	
1981	n/a	
1982	n/a	
1983	n/a	
1984	n/a	
1985	5	$56,800
1986	6	$80,610
1987	1	$5,000
1988	0	$0
1989	1	$25,000
1990	2	$77,000
1991	0	$0
1992	1	$2,000
1993	0	$0
1994	4	$247,140
Total	**20**	**$493,550**

PLEASANT RIDGE

	Bldgs	Cost
1980	n/a	
1981	n/a	
1982	n/a	
1983	n/a	
1984	n/a	
1985	0	$0
1986	2	$87,168
1987	1	$15,000
1988	1	$15,000
1989	0	$0
1990	0	$0
1991	0	$0
1992	0	$0
1993	0	$0
1994	0	$0
Total	**4**	**$117,168**

ROYAL OAK

	Bldgs	Cost
1980	n/a	
1981	n/a	
1982	n/a	
1983	n/a	
1984	n/a	
1985	0	$0
1986	1	$20,833
1987	36	$1,488,699
1988	48	$8,932,736
1989	94	$7,445,220
1990	180	$17,781,979
1991	154	$17,283,705
1992	143	$15,453,624
1993	47	$3,823,100
1994	33	$1,883,447
Total	**736**	**$74,113,343**

Source: U.S. Bureau of Census.

TABLE 8A

WOODWARD AVENUE CORRIDOR STUDY

PERMIT AUTHORIZED CONSTRUCTION - ADDITIONS, ALTERNATIONS & CONVERSIONS - SUMMARY (ITEM #437)
1980 - 1994
by participating cities

PARTICIPATING CITIES	UNITS	COST
BERKLEY	78	$2,126,019
BIRMINGHAM	442	$16,192,031
FERNDALE	402	$17,545,149
HUNTINGTON WOODS	20	$493,550
PLEASANT RIDGE	4	$117,168
ROYAL OAK	736	$74,113,343
TOTAL	**1682**	**$110,587,260**

Source: U.S. Bureau of Census.

MARKET ANALYSIS: CHAPTER IX

MERCHANTS SURVEY

MERCHANTS SURVEY

Purpose of the Chapter

In December 1993 a team of students from Lawrence Technological University administered an eight question Merchants Survey as part of the Woodward Avenue Corridor Study. A total of 108 valid surveys were completed and form the basis of the analysis which follows. A copy of the survey is attached (Appendix A). A summary of the results are presented in Table 1.

It is estimated that the Woodward Avenue Corridor Study Area embraces approximately 650 street-level businesses. Thus, the Merchants Survey results of 108 represent 16.6% of the street-level businesses in the study area. Table 2 displays the distribution of merchants responses by mile road segments.

PROFILE OF RESPONDENTS

Table 3 lists the responses utilizing six business categories. Although these classifications do not correspond with the SICs used elsewhere in this study, nor do the survey results necessarily reflect the business profile discussed earlier, the results, nevertheless, offer valuable insights and information.

Approximately 39% (42/108) of the respondents were classified as "Services," while the "Other" category accounted for 37% (40/108).

Within the "Services" category the 42 respondents were distributed among eight sub-categories. The sub-categories of "Business Services" (11), "Automotive Repair, Services, and Parking" (10) and "Personal Services" (7) ranked first through third, respectively.

LONGEVITY

Nearly 35% (37/108) of the merchants responding indicated that they have been located on Woodward Avenue over twenty years. In fact, 58% (63/108) of the merchants indicated that they have been located on Woodward Avenue for more than ten years. This suggests that Woodward Avenue has afforded these merchants a stable and profitable location.

Business turnover is somewhat reflected by the fact that 25% (27/108) of the merchants responding indicated that they have been located on Woodward Avenue less than six years. This suggests that new merchant locations on Woodward Avenue may have averaged 5% per year based on the responses received.

LOCATION

The reasons most cited by the responding merchants for choosing a Woodward Avenue location were its "central location" and "large exposure to consumers" (Table 1).

Rental price, although mentioned as a factor, does not appear to be a significant component, representing only 5.6% of the reasons cited.

CUSTOMER PROFILE

When asked to describe "typical" consumers utilizing residency, frequency of shopping, and age, the merchants responded that their customers primarily come from the "local" community (58) versus "distant" communities (39).

The typical customers were further defined as a "general mix of all ages" (77). "One-time (new) shoppers" were cited 32 times by the merchants. This may be reflective of commuter shopping stops.

POSITIVE/NEGATIVE ASPECTS

When identifying positive aspects of being located on Woodward Avenue, most often cited was "exposure to commuters" (79/223, 35.43%). The "variety of customer types" (54/223, 24.22%) and "being in a large commercial district" (34/223, 21.52%) were other key "plus" factors mentioned.

It is also noteworthy that "crime" was listed as both a positive factor and negative factor. Specifically, "crime" was cited (17/171, 9.94%) as a negative aspect while "low crime" was cited (21/223, 9.43%) as a positive aspect of being located on Woodward Avenue.

I-696 IMPACT

In general it appears that the overwhelming majority of merchants (43/53) responding to the survey felt that I-696 had "little effect" on their businesses. A relative few (10) claimed that it had a "large effect."

Furthermore, the vast majority (36) of responses categorized the effect as "mostly good qualities," while only two (2) responses rated the effect as "mostly bad qualities."

Of the total of 108 respondents, 28 indicated that they opened their businesses after I-696 was completed.

COMMENTS

"Well-known location," "easy to get to," "great amount of traffic," "good exposure," "centrally located" were the themes repeatedly cited as positive aspects by the merchants when asked for general comments.

Conversely, "limited parking," and "the high speed of traffic" were most frequently offered as key shortcomings of Woodward Avenue as a retail location. Also, in the Birmingham area the confusion that arises from the Woodward Avenue-Hunter Boulevard designations was cited as a primary concern.

One of the most noteworthy comments from a merchant stated: "The Woodward Corridor is without question the greatest advertising any restaurant would want."

APPENDIX A

Merchants Survey

Questionnaire

Dear Owner/Manager:

Students in the architecture program at Lawrence Technological University in Southfield, are currently conducting a survey of businesses located on Woodward Avenue between 8 and 16 Mile roads. This survey will be used to discover what types of influence Woodward Avenue has had on the urban structure around it.

Your business has been selected to participate in this survey. We would greatly appreciate it if you could answer a few key questions to assist us in our research and return this survey in the self-addressed, stamped envelope.

1. **Name of Business:**______________________________

2. **Address:**______________________________

3. **How many years has your business been located on Woodward Avenue?**
___ 1-5 ___ 6-10 ___ 11-15 ___ 16-20 ___ over 20

Note: On questions 4-8 please check all that apply.

4. **What are some of the reasons that you chose this location?**
___ within a large metro area
___ centrally located
___ on Woodward Avenue
___ large exposure to consumers
___ rental price
___ other:______________

5. **Describe some typical consumers that frequent your business.**
___ shoppers from the local community
___ younger shoppers
___ shoppers from distant communities
___ older shoppers
___ one-time (new) shoppers
___ general mix of all ages
___ other:______________________________

6. **What would you consider some negative aspects of being located on Woodward Avenue?**
___ parking
___ crime
___ traffic congestion/noise
___ minimum streetscaping
___ higher rent
___ other:____________

7. **What would you consider some positive aspects of being located on Woodward Avenue?**
___ exposure to commuters
___ being in a large commercial district
___ variety of consumer types
___ low crime
___ streetscaping
___ other:____________

8. **If your business was established before the opening of the I-696 expressway, how has this expressway influenced your business?**
___ little effect
___ large effect
___ mostly good qualities
___ mostly bad qualities
___ comments:______________________________

Please furnish some general comments on how you feel Woodward Avenue is having an effect on your business?

____

____

____

Thank you for your participation in our survey. We appreciate your time and honesty.

APPENDIX B

MERCHANTS SURVEY

LIST OF TABLES

Table 1	Merchant Survey: Summary
Table 2	Merchant Survey: Detailed by Mile Segments
Table 2A	Merchant Survey: Number of Responses by Mile Segments
Table 3	Merchant Survey: Types of businesses

TABLE 1

WOODWARD AVENUE CORRIDOR STUDY
Merchant Survey: Summary

Q-3. How many years has your business been located on Woodward Avenue?

Responses	#	%
1-5 years	27	24.77%
6-10 years	17	15.60%
11-15 years	18	16.51%
16-20 years	7	6.42%
over 20 years	37	34.86%
	106	98.17%
N/A	2	1.83%
	108	100.00%

Q-4. What are some of the reasons that you chose this location?

Categories		
Within a large metro area	35	15.09%
On Woodward Avenue	52	22.41%
Rental price	13	5.60%
Centrally located	58	25.00%
Large exposure to consumers	57	24.57%
Other	17	7.33%
	232	100.00%

Q-5. Describe some typical consumers that frequent your business.

Categories		
Shoppers from local community	58	20.86%
Shoppers from distant communities	39	14.03%
One-time (new) shoppers	32	11.51%
Younger shoppers	24	8.63%
Older shoppers	29	10.43%
General mix of all ages	77	27.70%
Other	19	6.83%
	278	100.00%

Q-6. What would you consider some negative aspects of being located on Woodward?

Categories		
Parking	61	35.67%
Traffic congestion/noise	42	24.56%
Higher rent	25	14.62%
Crime	17	9.94%
Minimum streetscaping	14	8.19%
Other	12	7.02%
	171	100.00%

Q-7. What would you consider some positive aspects of being located on Woodward?

Categories		
Exposure to commuters	79	35.43%
Variety of consumer types	54	24.22%
Streetscaping	8	3.59%
Being in a large commercial district	48	21.52%
Low crime	21	9.42%
Other	13	5.83%
	223	100.00%

Q-8. If your business was established before the opening of the I-696 expressway, how has this expressway influenced your business?

Categories		
Little effect	43	53.80%
Large effect	10	12.50%
N/A	27	33.80%
	80	100.00%
Mostly good qualities	36	45.00%
Mostly bad qualities	2	2.50%
N/A	42	52.50%
	80	100.00%

Note: Total Respondents = 108, except for Q-8 where a total of 80 valid responses were received. An additional total of 28 respondents indicated that they opened their businesses after completion of I-696. N/A denotes no answer.
Source: Merchant Survey conducted by Lawrence Technological University in December, 1993.

TABLE 2

WOODWARD AVENUE CORRIDOR STUDY
MERCHANT SURVEY: DETAILED
by mile segments

Please furnish some general comments on how you feel Woodward Avenue is having an effect on your business.

Total Respondents = 108

8-9 Mile Road

Name of Business	Classification	Comments ***
Allied Printing	Service	
Ameritronix	Other	Good traffic and exposure.
Crandall Worthington	Other	
Elliott Saw Works	Other	It allows people to get to you.
Gage Oldsmobile	Service	Very positive because of the great amount of traffic and exposure
Gage Oldsmobile, Inc.	Service	
Hi-Fi Specialists, Inc.	Service	
McMurray Electric	Other	
Paperbacks Unlimited	Other	
Traurig's Quilt & Pillow Store	Other	
White Castle	Restaurant	No turn-around close by affects negatively on business.

9-10 Mile Road

Name of Business	Classification	Comments ***
Casual Living Modes	Other	Accessibility is good, although the traffic pattern is fast-moving.
Comerica Bank	Bank	Limited parking
Como's Restaurant	Restaurant	
Falcon Golf, Inc.	Other	Area's most noted street is positive, too much traffic is a negative
Ferndale Elks Lodge #1588	Service	We have been here for over 45 yrs. and the members have always wanted to stay centrally located as a lodge in Ferndale.
First Care Medical Center	Service	We like Ferndale and find the exposure helpful. We service clients from Detroit to Birmingham from Southfield to Warren. Our practice has increased monthly.
Geake Sporting Goods	Other	
General Mortgage Corporation	Service	It's a beautiful avenue in a clean, well-cared for area.
George Petkoski	Service	Well-known location, identifiable, centrally located
Golden Star Restaurant	Restaurant	The parking on Woodward sucks. I believe the speed on Woodward should be lowered to 35 mph for better business.
Gordy's Music	Other	
Hilton Upholstering	Service	The high speed of traffic on Woodward is bad for business. The speed limit 35 mph is great, but not enforced.
IRIS Fashion	Clothing Store	
J & L Promotions, Inc.	Service	I have found it necessary to have locked doors due to the indigents walking in off the streets to beg for food, money, or clothing.
Ashmore Tractor -n- Trailor	Other	
K & L Auto Repair	Service	
Lewiston Clinic	Service	
Long John Silvers	Restaurant	Good for business to be located here
Michigan Piano Company	Other	Positively in the last year
Northland Collision Inc.	Service	Main street--good area, central location, good police department, good chamber of commerce. A lot of other pluses, not room to write it all. We're happy.
Perry Drug Store	Drug Store	Parking is bad.
Pianoworks	Other	
Safelite Auto Glass	Other	696 is a reason why we are here
Sinbads Hair Studios	Service	
Touch of Light	Other	Accessibility from all metro districts, visibility from downtown communities who travel Woodward Avenue.
U-neek International	Clothing Store	Allows people from all over to reach a well-known area
Vamps	Clothing Store	Good

Table 2 cont'd

10 Mile Road to Lincoln

Name of Business	Classification	Comments ***
Big Boy	Restaurant	Opening of 696 has changed atmosphere from a local business to a commuter stop
Burger King	Restaurant	Great potential at one time, but access to other freeways to downtown has reduced the amount of available traffic along with splitting the street. Being down the road another 1/2 mile would be very beneficial.
Chic -n- Ribs	Restaurant	
Evans, Pletkovic, Hays, & Rhodes	Service	
Mickey Shore	Other	
The Eatery	Restaurant	Speed limit needs to be reduced for better visibility of restaurant
Thom Alex Hair & Nail Design	Service	Being a new business owner, it's too early to tell. But I feel the potential due to the exposure and familiarity of the Woodward name can only help bring new business in.
Thrifty Florist	Other	

Lincoln to 11 Mile Road

Name of Business	Classification	Comments ***
Bancorp Group	Service	Easy for customers to find, centrally located
* Central Agency Corporation	Service	Would not answer the survey
D. W. Krane and Co.	Service	Location, egress & ingress convenience
John W. Gillette Co.	Service	No consumer effect, however it is nice to get to the office and to get home
Lesser Clinic	Service	Best location for entire metro area

11-12 Mile Road

Name of Business	Classification	Comments ***
Banana's For Hair	Service	A good, busy street. A lot of people notice us just driving.
Car Tunes	Other	Great effect on business-exposure.
Denny's	Restaurant	
DMI	Other	Large commercial and professional influences nearby
Donut Cutter	Restaurant	Trash pick-up, snow removal
First Federal of Michigan	Bank	No effect, good or bad.
Henderson Glass	Other	
Marathon Gas Station	Service	Generally doing well to have so many people driving by Woodward and 11 Mile Road.
Mngmnt. & Mktg. Services, Inc.	Service	Provides a higher image address to our companies clients which include the domestic automotive companies. Although not a retail business, I'm sure we would benefit from the exposure we get with our clients who drive past our building. In addition, we are easy to find by clients who do have to come to our building to work together.
Next Day Signs	Other	Better parking, repave Woodward, clean up existing building
Onion Roll Deli	Restaurant	Speed's too fast, people drive by without notice of what is on left and right
Piccadilly Petal'er	Restaurant	
Pro Golf Discount	Other	We are located in such an area that people who are just driving by may see us and decide to stop in.
Radio Shack	Other	
Royal Oak Books	Other	
State Farm	Service	Exposure plus access,many people travel Woodward to Birmingham & Bloomfield as well as Ferndale, Berkley, Royal Oak.
The Monogram Store	Other	The large number of homeless walking the streets has been not condusive to my type of retailing.
U. S. Printing	Service	Brings you good and bad - Berkley is a good community base
Walsh & Associates	Service	Generally, Woodward is a benefit. However, the lack of parking is a problem.
Wetlands Bar -n- Grill	Restaurant	Better business with younger crowd, great exposure

Table 2 cont'd

12-13 Mile Road

Name of Business	Classification	Comments ***
Century Camera Inc.	Other	Woodward Avenue is centrally located, from 12 Mile to Maple is one long strip center.
Color Tile	Other	
Harmony House	Other	
International House of Pancake	Restaurant	Good effect-keep on bringing different kinds of customers
McDonald's	Restaurant	It's a great road to have a business on.
MGM Cleaners	Service	
Northwood Car Wash	Service	Used to be nice condition, poor road condition on Coolidge
Northwood Jewelers	Other	We need parking.
Perry Drug Store	Drug Store	
Pet Supplies Plus	Other	We receive a lot of customers because it is a well-traveled road.
Re/Max Partners	Service	
Super Sub Shop	Restaurant	
The Woodworker's Store	Other	
Woodward Printing Company	Service	Central location, lighting, shopping mall appearance

13-14 Mile Road

Name of Business	Classification	Comments ***
Arno Paint & Wallpaper	Other	People from all communities shop Woodward, not just certain areas.
Ram's Horn	Restaurant	Parking is main problem, old businesses should be updated
Uncle Ed's Oil Shop	Service	High traffic volume on Woodward is a continuing contribution to our customer volume and growth. A main concern on Woodward is the growing crime rate. It is a very unattractive aspect of conducting business on Woodward Avenue.

14-15 Mile Road

Name of Business	Classification	Comments ***
Antoun's Service	Service	Very high traffic area
Azar's Oriental Rugs	Other	Birmingham City is the richest town in Michigan, on Woodward Ave. in downtown Birmingham is the most important site.
Birmingham Glass	Other	
Birmingham Studio Salon	Service	
Birmingham Ultra Service Center	Service	
Forster Laidlaw Florist	Other	
Four Corners Travel	Service	
Gasow Veterinary Hospital	Service	
Gettel Management	Service	
Great Escape Travel	Service	We like Woodward Avenue and Birmingham.
Hunter House Hamburgers, Inc.	Restaurant	The Woodward Corridor is without question the greatest advertising any restaurant would want.
M. T. Hunter Country Store	Grocery Store	We are too far from central area of Birmingham to be affected by downtown. Traffic is too fast paced to attract business from commuters.
International House of Pancake	Restaurant	
** Little Caesars	Restaurant	Big confusion between Hunter and Woodward.
Manage Budget Services	Service	
John W. Mills D.D.S	Service	Being on Woodward does not directly affect our business since we do not depend on exposure.
Napier's Kennel Shop	Other	
Oakland County Medical Society	Service	
State Farm	Service	
Workbench	Other	Because we are actually located on Hunter Blvd., people confuse Hunter with Woodward; therefore we feel that it's costing us some business.

* this business refused to answer any questions on the survey.
** this business answered only part of the survey.
*** comments listed are unedited, they appear as recorded in the worksheets.
Source: Merchant Survey conducted by Lawrence Technological University in December, 1993.

TABLE 2A

MERCHANTS SURVEY
NUMBER OF RESPONSES BY MILE ROAD SEGMENTS
Conducted by LTU: Dec., 1993

Location by mile segment	West Side	East Side	East/West Combined	Total	Percent
8 - 9	6	6		12	11.0
9 - 10			27	27	24.8
10 - 11	2	3	8	13	11.9
11 - 12	9	11		20	18.3
12 - 13	5	9		14	12.8
13 - 14	3			3	2.8
14 - 15	10	10		20	18.3
TOTAL				**109**	**100.0***

*Discrepancy due to rounding

TABLE 3

WOODWARD AVENUE CORRIDOR STUDY
MERCHANT SURVEY
types of businesses

CATEGORY	TOTAL	%
SERVICES		
Business Services		
Allied Printing		
Bancorp Group		
Central Agency Corporation (1)		
General Mortgage Corporation		
John W. Gillette Co.		
Re/Max Partners		
State Farm 1214 W.A. R.O.		
State Farm 1100 W.A. Bl Hills		
U. S. Printing		
Walsh & Associates		
Woodward Printing Company		
Subtotal	11	10.19%
Automotive Repair, Services, and Parking		
Antoun's Service		
Birmingham Ultra Service Center		
Gage Oldsmobile 21710 W. A. New Car		
Gage Oldsmobile, Inc. 21800 W.A. Used		
K & L Auto Repair		
Marathon Gas Station		
Northland Collision Inc.		
Northwood Car Wash		
Safelite Auto Glass		
Uncle Ed's Oil Shop		
Subtotal	10	9.26%
Personal Services		
Banana's For Hair		
Birmingham Studio Salon		
Four Corners Travel		
Great Escape Travel		
MGM Cleaners		
Sinbads Hair Studios		
Thom Alex Hair & Nail Design		
Subtotal	7	6.48%
Engineering, Accounting, Research, Management, and Related Services		
Gettel Management		
J & L Promotions, Inc.		
D. W. Krane and Co.		
Manage Budget Services		
Mngmnt. & Mktg. Services, Inc.		
George Petkoski		
Subtotal	6	5.56%
Health Services		
First Care Medical Center		
John W. Mills D.D.S		
Lesser Clinic		
Lewiston Clinic		
Subtotal	4	3.70%
Miscellaneous Repair		
Hilton Upholstering		
Subtotal	1	0.93%
Legal Services		
Evans, Pletkovic, Hays, & Rhodes		
Subtotal	1	0.93%
Membership Organizations		
Ferndale Elks Lodge #1588		
Oakland County Medical Society		
Subtotal	2	1.85%
SERVICE TOTAL	42	38.89%

(1) this business refused to answer any questions on the survey.
(2) this business answered only part of the survey.
Source: Merchant Survey conducted by Lawrence Technological University in December, 1993.

CATEGORY	TOTAL	%
OTHER		
Ameritronix		
Arno Paint & Wallpaper		
Ashmore Tractor -n- Trailor		
Azar's Oriental Rugs		
Birmingham Glass		
Car Tunes		
Casual Living Modes		
Century Camera, Inc.		
Color Tile		
Crandall Worthington		
DMI		
Elliott Saw Works		
Falcon Golf, Inc.		
Forster Laidlaw Florist		
Gasow Veterinary Hospital		
Geake Sporting Goods		
Gordy's Music		
Harmony House		
Henderson Glass		
Hi-Fi Specialists		
McMurray Electric		
Michigan Piano Company		
Mickey Shore		
M. T. Hunter Country Store		
Napier's Kennel Shop		
Next Day Signs		
Northwood Jewelers		
Paperbacks Unlimited		
Pet Supplies Plus		
Pianoworks		
Piccadilly Petal'Er		
Pro Golf Discount		
Radio Shack		
Royal Oak Books		
The Monogram Store		
The Woodworker's Store		
Thrifty Florist		
Touch of Light		
Traurig's Quilt & Pillow Store		
Workbench		
OTHER TOTAL	40	37.04%

RESTAURANTS		
Big Boy		
Burger King		
Chic -n- Ribs		
Como's Restaurant		
Denny's		
Donut Cutter		
Golden Star Restaurant		
Hunter House Hamburgers		
Internat'l Hs of Pancake-R.O.		
Internat'l Hs of Pancake-B'ham		
Little Caesars (2)		
Long John Silvers		
McDonald's		
Onion Roll Deli		
Ram's Horn		
Super Sub Shop		
The Eatery		
Wetlands Bar -n- Grill		
White Castle		
RESTAURANT TOTAL	19	17.59%

CLOTHING STORES		
IRIS Fashion		
U-neek International		
Vamps		
CLOTHING STORE TOTAL	3	2.78%

BANKS		
Comerica Bank		
First Federal of Michigan		
BANK TOTAL	2	1.85%

DRUG STORES		
Perry Drug Store - Ferndale		
Perry Drug Store - R.O.		
DRUG STORE TOTAL	2	1.85%

MARKET ANALYSIS: CHAPTER X

USERS SURVEY

USERS SURVEY

Purpose of the Chapter

The original purpose of this section was to provide a detailed analysis of the Users Survey conducted, in part, by LTU in December 1993. During 1994 responses to the closed-ended questions were tabulated by LTU. The balance of the Survey contained open-ended questions, which were recorded by staff in preparation for this section. In late 1994 a consultant was engaged to refine and expand the analysis. The results of that effort have been reported previously as part of the *Background Report*. Thus, the original purpose of this section has been modified.

The narrative and tables included in this section primarily cover two areas: 1) residency, and 2) a detailed presentation of responses to the open-ended questions.

Residency data has been gathered from two sources, namely, the Users Survey and a companion License Plate Survey. The data and narrative, with respect to the latter survey, are presented for the first time in this section.

Since the tables dealing with the open-ended questions were made available to the consultant and covered in his report, they are included here as reference material with a minimum of comment.

RESIDENCY

The Users Survey produced a total of 423 valid responses. Residency information was available for 334 or 79%. A little more than half, 172 (51.5%), of the survey respondents, were from the Study's six participating cities of Berkley, Birmingham, Ferndale, Huntington Woods, Pleasant Ridge and Royal Oak. Table 1 indicates the rank order of respondents by "Participating Cities" and "Other Cities." Table 2 displays the residency of the respondents by City, County, State and Country.

The data suggest that Woodward Avenue, between Eight Mile and Quarton Roads and its constituent mix of merchant, professional and service establishments, draws shoppers from a significantly wide service area. This area embraces a sizeable portion of southeast

Michigan. The tri-county area of Oakland, Wayne, and Macomb counties accounted for 325 (97.3%) of the total respondents.

Other surrounding counties (Genesee, St. Clair, and Washtenaw) were also represented. In addition, residents of Toledo, Ohio and Windsor, Canada were interviewed as part of the Survey.

Woodward Avenue's: (1) central location, (2) easy access, (3) large traffic volume capacity and (4) mix of retail and service businesses are key factors contributing to the wide geographic distribution of the respondents.

The results of this Survey also indicate that an overwhelming majority (223, 67%) of the respondents were from neighboring cities, such as Southfield (20), Oak Park (14), Warren (9) and Troy (8), as well as, the aforementioned six participating communities. Utilizing the location of Woodward Avenue and Catalpa (11 1/2 mile) as the center, approximately 2/3 of the respondents lived within a five mile radius. The large number of respondents from the immediate area also suggests the importance of Woodward Avenue as a retail location, serving the surrounding neighborhoods and communities.

Residents from the City of Detroit (28, 8.38%) were also prominent in the Survey. Due to the lack of exact home location and the vast size of Detroit, it is undeterminable from this Survey as to whether the Detroit respondents reside within the immediate area as described by the five-mile radius. Daily commuting shopping stops, destination shopping trips, along with convenience shopping and proximity, may all account for the significant presence of Detroiters in the survey. The mile segment analysis discussed below does, however, shed some light on this issue.

In looking at the residency of respondents by sub area within the Study Area, the responses are broken down by mile segments and further differentiated by the east and west sides of Woodward Avenue (Table 3).

With regard to the respondents who are residents of the six participating communities, it appears that, in general, they were intercepted at establishments on Woodward Avenue in their respective cities. For example, of the total of 14 Berkley residents responding to the Survey, 11 (79%) interviews took place between Eleven Mile and Thirteen Mile, roughly the east boundary of the City of Berkley. Similarly, 19 (56%) of the 34 Birmingham residents were interviewed between Thirteen Mile and Maple Roads. With respect to Ferndale, 26 (62%) of the 42 residents interviewed were intercepted between Eight Mile and Ten Mile Roads. Likewise, three (43%) of the seven Pleasant Ridge residents were intercepted between Nine and Ten Mile Roads.

However, Huntington Woods (10) and Royal Oak (65) resident respondents appear to be "evenly" distributed throughout the Corridor. The City of Royal Oak has retail frontage that extends approximately 4 miles (Ten Mile to Fourteen Mile) on the east side of

Woodward Avenue. Consequently, it should be noted that 35 (54%) of Royal Oak's resident respondents were intercepted between Ten and Fourteen Mile.

In looking at the respondents from neighboring cities (Southfield, 20; Oak Park, 14; Warren, 9; and Troy, 8), no particular distribution pattern appears evident.

With respect to the City of Detroit residents, 21 (75%) of the 28 respondents were interviewed between Eight and Ten Mile Roads. Of the total of 126 interviews conducted between Eight and Ten Mile Roads, Detroiters (21) represented 16.7% of the total.

LICENSE PLATE SURVEY

As part of the field work conducted by the LTU students in late 1993, a License Plate Survey was included. This was a "random" survey which identified some 620 "valid" numbers which were subsequently processed with the aid of the Michigan Office of Secretary of State in early 1995. The results are displayed in Tables 7A and 7B.

In general, the results of this survey coincide with the residency distribution delineated above as derived from the Users Survey. Specifically, the percent of license plates emanating from communities either wholly or partially within the aforementioned five-mile radius of Woodward Avenue and Catalpa is approximately 62%, versus the previously referenced 67%.

However, there were some noteworthy differences. In the Users Survey the six participating cities accounted for 51.5% of all useable responses, but these units only accounted for 29.4% of the total License Plate Survey. Similarly, Oakland County's total representation totaled 76% in the Users Survey compared with 66% in the License Plate Survey. Macomb County's representation varied little (8.7% vs 8.1%) between the two surveys. Wayne County's representation did, however, vary significantly (12.6% vs. 20.3%). Of special note is the City of Detroit's representation remained significant in both surveys; being 8.38% of the Users Survey and 9.8% of the License Plate Survey.

SHOPPER PREFERENCES AND SUGGESTIONS - HIGHLIGHTS

When asked: "What new types of shops or services... would bring you here more often?," the most cited responses are: "restaurants," "clothing," "entertainment" (Table 4A). Although certain responses such as "restaurants," "entertainment," "clubs," "malls," "movie theater," "department store," etc. are suggestive of areawide market support, the bulk of the citations, including restaurants, appear to reflect retail support of neighborhood and community needs (i.e. "clothing," "grocery," "hardware," "shoe store," "drug store," etc.).

When asked: "What could merchants do to bring you here more often?," "sales" leads the list by a wide margin. Greater awareness through merchant advertising ranked second. "Improved appearance," "parking," "lower prices" and "expanded store hours" were ranked third through sixth in the responses cited (Table 4B). However, of the total 453 respondents, nearly 60% (271/453) offered no response. Such a large percentage may, in part, be reflective of a general satisfaction with the status quo. When the responses of "sales" (48) are added to "lower prices" (23), "discounts" (8), "coupons" (2) and "specials" (2), competitive pricing emerges as a key factor in the interviewees responses.

When asked: "What could the local cities do to make shopping on Woodward more enjoyable?," the runaway response leader was "improve parking" (57). "Appearance" (21), "cleanliness" (19), "traffic" (17) and "safety" (11) ranked second through fifth respectively (Table 4C).

When asked: "Which places do you frequently visit on Woodward Avenue?," "restaurants and bars" were most often cited, both specifically and generically (Table 5). To this question 453 total respondents generated 954 specific and generic responses. Restaurants and bars, when combined with the related category of "entertainment," accounted for 35.43% of the total responses. The combination of "drug stores," "grocery," "clothing," "bank," and "service," represented 32.6% of the total. This grouping is suggestive of neighborhood and community support retail activity.

The "Other" category is broad in scope (see definitions) and contains citations which are suggestive of retail activity with broad-based market area, i.e. furniture, motel, art supply stores, etc., as well as, neighborhood retail activity, such as video rental. Within the "Other" category, most often cited were art supply stores (33), Harmony House (31), Blockbuster Video (11), pet stores (11), hobby stores (10), fabric stores (9), Paperbacks Unlimited (9) and Pier One Imports (6).

Generally, the respondents cited businesses within the immediate area of the interview location. For example, those interviewed between Fourteen Mile and Maple Roads, overwhelmingly cited establishments in the north Woodward/Birmingham area. Similarly, interviewees intercepted in Ferndale between Eight and Nine Mile most often cited (approximately 90/131 or 69%) businesses in that vicinity. Only a few establishments were cited by respondents in all (or nearly all) of the mile segments; notable are DMI and Westborn Market.

CONCLUSION

The Users Survey and companion License Plate Survey generated two major findings with respect to residency. First, it appears that the Woodward Avenue businesses are strongly tied to the residents of the nearby neighborhoods and cities. The Users Survey indicates that approximately two-thirds of the respondents resided within a five-mile radius of Woodward at Catalpa. The License Plate Survey tended to reinforce this relationship, albeit at a slightly lower percentage.

Second, both surveys clearly indicate that the Woodward Corridor draws shoppers and visitors from throughout the Southeast Michigan region, as well as, out state and Canada. No doubt this broad regional representation is made possible by a variety of factors, not the least of which are Woodward's central location, easy access, ability to accommodate large traffic volumes and strong location identity among the general populace. All of these factors are generally regarded as major assets for successful retail development.

In regard to which businesses brought the shoppers and visitors to Woodward on the survey dates, the broad category of "Entertainment," including restaurant and bars, accounted for more than 35% of the total responses. This group probably spans all four market segments previously identified as: neighborhood, regional, commuter and tourist.

The combination of drug stores, grocery, clothing, bank and service represented nearly 33%. This group appears to be more directly related to the neighborhood and commuter market groups.

Consumer preferences for new types of shops or services appears to call for more of the offerings which they presently frequent, namely: restaurants, entertainment and clothing. As noted, these first two categories appear to be well represented and supported and are likely to continue to represent growth opportunities for both existing and new establishments. However, as recent media reports indicate, such expansion and new development appear to be meeting with ever increasing community concern and resistance. Limited site sizes often do not afford sufficient on-site parking, and waivers are often denied in deference to nearby neighborhood concerns.

With respect to the expressed preference for more clothing and to some degree related "department stores" and "malls," it appears from the "Retail" chapter that the number of such establishments have declined over the last 15 years. The last department store on the Corridor was J.C. Penney which vacated its Northwood Shopping Center location several years ago.

Although it is true that general clothing stores are not common on Woodward, the Corridor is dotted with specialty clothing retail shops such as bridal salons, tuxedo rental, uniform and maternity shops. In recent years resale clothing shops for women and children have appeared on the Corridor. Also, discount and general retail clothing stores are well represented throughout the area's malls and shopping centers. Thus, the limited number of Woodward Avenue clothing stores may be a correct expression of this sector's potential, given the nature of the sector and available options throughout the area.

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TABLE 1

WOODWARD AVENUE CORRIDOR STUDY
SHOPPERS SURVEY
Residency summary by rank order

Q-13. IN WHICH CITY DO YOU LIVE?

PARTICIPATING CITIES	TOTAL	% of TOTAL
Royal Oak	65	19.46%
Ferndale	42	12.57%
Birmingham	34	10.18%
Berkley	14	4.19%
Huntington Woods	10	2.99%
Pleasant Ridge	7	2.10%
PARTICIPATING CITIES TOTALS	172	51.50%

OTHER CITIES

	TOTAL	% of TOTAL
Detroit	28	8.38%
Southfield	20	5.99%
Oak Park	14	4.19%
Warren	9	2.69%
Troy	8	2.40%
Sterling Heights	7	2.10%
Bloomfield Hills	6	1.80%
Novi	6	1.80%
Farmington Hills	4	1.20%
Hazel Park	4	1.20%
Highland Park	4	1.20%
St. Clair Shores	4	1.20%
Lake Orion	3	0.90%
Madison Heights	3	0.90%
Waterford	3	0.90%
Windsor	3	0.90%
Ann Arbor	2	0.60%
Beverly Hills	2	0.60%
Clawson	2	0.60%
Dearborn	2	0.60%
Dearborn Heights	2	0.60%
Macomb	2	0.60%
Mt. Clemens	2	0.60%
Roseville	2	0.60%
Toledo	2	0.60%
Auburn Hills	1	0.30%
Clinton Township	1	0.30%
Flint	1	0.30%
Franklin	1	0.30%
Garden City	1	0.30%
Grosse Pointe	1	0.30%
Hamtramck	1	0.30%
Livonia	1	0.30%
New Baltimore	1	0.30%
Northville	1	0.30%
Ortonville	1	0.30%
Pontiac	1	0.30%
Port Huron	1	0.30%
Redford	1	0.30%
Rochester	1	0.30%
Rochester Hills	1	0.30%
Romeo	1	0.30%
West Bloomfield	1	0.30%
TOTAL OF OTHER CITIES	162	48.50%
SURVEY TOTAL	334	100.00%

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 2

WOODWARD AVENUE CORRIDOR STUDY
SHOPPERS SURVEY
Residency summary by County, State, Country

Q-13. IN WHICH CITY DO YOU LIVE?

PARTICIPATING CITIES

	TOTAL
Berkley	14
Birmingham	34
Ferndale	42
Huntington Woods	10
Pleasant Ridge	7
Royal Oak	65
PARTICIPATING CITIES: TOTALS	172

OTHER CITIES, BY COUNTY

Oakland County (BAL)	TOTAL
Auburn Hills	1
Beverly Hills	2
Bloomfield Hills	6
Clawson	2
Farmington Hills	4
Franklin	1
Hazel Park	4
Lake Orion	3
Madison Heights	3
Novi	6
Oak Park	14
Ortonville	1
Pontiac	1
Rochester	1
Rochester Hills	1
Southfield	20
Troy	8
Waterford	3
West Bloomfield	1
Oak. Cnty. (BAL) Subtotal	**82**
Oakland County Total	**254**

Wayne County	
Dearborn	2
Dearborn Heights	2
Detroit	28
Garden City	1
Grosse Pointe	1
Hamtramck	1
Highland Park	4
Livonia	1
Northville	1
Redford	1
Wayne County Total	**42**

Macomb County	TOTAL
Clinton Township	1
Macomb	2
Mt. Clemens	2
New Baltimore	1
Romeo	1
Roseville	2
Sterling Heights	7
St. Clair Shores	4
Warren	9
Macomb County Total	**29**

Genessee County	
Flint	1
Genessee County Total	**1**

St. Clair County	
Port Huron	1
St. Clair County Total	**1**

Washtenaw County	
Ann Arbor	2
Washtenaw County Total	**2**

Ohio	
Toledo	2
Ohio Total	**2**

Canada	
Windsor	3
Canada Total	**3**

OTHER CITIES, BY COUNTY: TOTALS	162
SURVEY TOTAL	334

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 3

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Residency by County, State, Country
by mile segments

	EAST 8-9	WEST 8-9	E/W 9-10	EAST 10-11	WEST 10-11	EAST 11-12	WEST 11-12	EAST 12-13	WEST 12-13	WEST 13-14	EAST 14-15	WEST 14-15	TOTAL
PARTICIPATING CITIES													
Berkley	0	0	1	1	1	4	2	0	5	0	0	0	14
Birmingham	2	0	1	0	0	1	8	2	1	6	5	8	34
Ferndale	12	9	5	5	0	2	1	7	1	0	0	0	42
Huntington Woods	1	0	1	1	1	2	1	1	0	0	1	1	10
Pleasant Ridge	0	0	3	0	1	0	0	1	0	0	1	1	7
Royal Oak	7	5	6	5	2	6	6	4	6	6	4	8	65
PARTICIPATING CITIES: TOTALS	22	14	17	12	5	15	18	15	13	12	11	18	172
OTHER CITIES, BY COUNTY													
Oakland County (BAL)													
Auburn Hills	0	0	0	0	0	0	1	0	0	0	0	0	1
Beverly Hills	0	0	1	0	0	0	0	0	0	1	0	0	2
Bloomfield Hills	1	1	1	0	0	1	1	0	0	1	0	0	6
Clawson	1	0	0	0	0	0	0	0	1	0	0	0	2
Farmington Hills	0	1	2	0	0	0	1	0	0	0	0	0	4
Franklin	1	0	0	0	0	0	0	0	0	0	0	0	1
Hazel Park	1	0	0	0	0	0	0	1	0	0	1	1	4
Lake Orion	0	0	0	0	0	0	0	0	1	0	1	1	3
Madison Heights	1	0	0	0	0	0	0	0	0	0	1	1	3
Novi	1	0	1	0	0	0	0	0	0	0	2	2	6
Oak Park	2	1	2	0	1	1	0	0	1	0	3	3	14
Ortonville	0	0	1	0	0	0	0	0	0	0	0	0	1
Pontiac	0	0	0	0	1	0	0	0	0	0	0	0	1
Rochester	0	0	0	0	0	0	0	1	0	0	0	0	1
Rochester Hills	0	0	1	0	0	0	0	0	0	0	0	0	1
Southfield	0	4	3	0	2	7	4	0	0	0	0	0	20
Troy	2	0	2	1	0	0	2	1	0	0	0	0	8
Waterford	0	0	0	0	0	0	1	0	0	0	1	1	3
West Bloomfield	0	0	0	0	0	0	1	0	0	0	0	0	1
Oak. Cnty. (BAL) Subtotal	10	7	14	1	4	9	11	3	3	2	9	9	82
Oakland County Total	32	21	31	13	9	24	29	18	16	14	20	27	254
Wayne County													
Dearborn	0	0	0	0	0	0	0	0	0	0	1	1	2
Dearborn Heights	0	0	0	0	0	1	0	0	0	1	0	0	2
Detroit	5	5	11	0	1	1	1	1	1	2	0	0	28
Garden City	0	0	0	0	0	0	1	0	0	0	0	0	1
Grosse Pointe	0	1	0	0	0	0	0	0	0	0	0	0	1
Hamtramck	0	1	0	0	0	0	0	0	0	0	0	0	1
Highland Park	0	2	2	0	0	0	0	0	0	0	0	0	4
Livonia	0	0	1	0	0	0	0	0	0	0	0	0	1
Northville	0	0	1	0	0	0	0	0	0	0	0	0	1
Redford	0	0	1	0	0	0	0	0	0	0	0	0	1
Wayne County Total	5	9	16	0	1	2	2	1	1	3	1	1	42

Table 3 cont'd

	EAST 8-9	WEST 8-9	E/W 9-10	EAST 10-11	WEST 10-11	EAST 11-12	WEST 11-12	EAST 12-13	WEST 12-13	WEST 13-14	EAST 14-15	WEST 14-15	TOTAL
Macomb County													
Clinton Township	0	0	0	0	0	1	0	0	0	0	0	0	1
Macomb	0	0	0	0	0	0	0	0	0	0	1	1	2
Mt. Clemens	0	0	0	0	0	0	0	2	0	0	0	0	2
New Baltimore	0	0	0	0	0	0	0	0	0	1	0	0	1
Romeo	0	0	0	0	0	0	0	1	0	0	0	0	1
Roseville	0	0	0	0	0	0	0	2	0	0	0	0	2
Sterling Heights	0	3	3	0	0	1	0	0	0	0	0	0	7
St. Clair Shores	0	0	1	0	0	0	0	3	0	0	0	0	4
Warren	0	1	2	0	0	3	2	1	0	0	0	0	9
Macomb County Total	0	4	6	0	0	5	2	9	0	1	1	1	29
Genessee County													
Flint	0	0	1	0	0	0	0	0	0	0	0	0	1
Genessee County Total	0	0	1	0	0	0	0	0	0	0	0	0	1
St. Clair County													
Port Huron	0	1	0	0	0	0	0	0	0	0	0	0	1
St. Clair County Total	0	1	0	0	0	0	0	0	0	0	0	0	1
Washtenaw County													
Ann Arbor	0	0	0	0	0	0	0	0	0	0	1	1	2
Washtenaw County Total	0	0	0	0	0	0	0	0	0	0	1	1	2
Ohio													
Toledo	0	0	0	0	0	0	0	0	0	0	1	1	2
Ohio Total	0	0	0	0	0	0	0	0	0	0	1	1	2
Canada													
Windsor	0	0	0	0	0	0	0	1	0	0	1	1	3
Canada Total	0	0	0	0	0	0	0	1	0	0	1	1	3
OTHER CITIES BY COUNTY TOTALS	15	21	37	1	5	16	15	14	4	6	14	14	162
SURVEY TOTAL	37	35	54	13	10	31	33	29	17	18	25	32	334

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 4A

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Response to Question # 10 Summary

Q-10. What new types of shops or services do you think would bring you here more often?

Responses *	#	%	Responses	#	%	Responses	#	%
Restaurants	38	7.87%	Specialty Store	3	0.62%	Health Food Store	1	0.21%
Clothing	29	6.00%	Advertising	2	0.41%	Higher Class	1	0.21%
Entertainment	19	3.93%	Discounts	2	0.41%	Intimate Shopping	1	0.21%
Retail	15	3.11%	Music Store	2	0.41%	More Open Hours	1	0.21%
Clubs	12	2.48%	Senior Discount	2	0.41%	Outlets	1	0.21%
Sporting Goods	11	2.28%	Art Galleries	1	0.21%	Pet Store	1	0.21%
Nothing	11	2.28%	Bars	1	0.21%	Recreation Facility	1	0.21%
Grocery	11	2.28%	Better Service	1	0.21%	Recreation Shop	1	0.21%
Malls	7	1.45%	Birmingham	1	0.21%	Shoe Repair	1	0.21%
Food Service	6	1.24%	Bldg. Supply Store	1	0.21%	Shows	1	0.21%
Hardware	6	1.24%	Boating	1	0.21%	Variety	1	0.21%
Book Store	5	1.04%	Cake Decoration	1	0.21%	Video Store	1	0.21%
Everything	5	1.04%	Computer Store	1	0.21%			
Movie Theater	5	1.04%	Diversity	1	0.21%	**Specific Responses**	**228**	**47.20%**
Department Store	3	0.62%	Drug Store	1	0.21%			
Gift Store	3	0.62%	Electronic Store	1	0.21%	**N/A**	**255**	**52.80%**
Markets	3	0.62%	Gas Station	1	0.21%			
Shoe Store	3	0.62%	Health Clubs	1	0.21%	**Total**	**483**	**100.00%**

* The responses listed are unedited, they appear as recorded in the worksheets.

Total Respondents = 453
255 of the 453 Total Respondents (56.3%) offered no response (ie. N/A).
198 of the 453 Total Respondents (43.7%) generated 228 Specific Responses.

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 4B

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Response to Question #11 Summary

Q-11. What could merchants do to bring you here more often?

Responses *	#	%
Sales	48	9.98%
Advertise	28	5.82%
Appearance	24	4.99%
Parking	23	4.78%
Lower Prices	15	3.12%
Open More Hours	10	2.08%
Nothing	9	1.87%
Better Services	9	1.87%
Discounts	8	1.66%
Quality Goods	6	1.25%
Cleanliness	5	1.04%
Better Signs	4	0.83%
Coupons	2	0.42%
More Businesses	2	0.42%
Restaurants	2	0.42%
Safety	2	0.42%
Sidewalks	2	0.42%

Responses	#	%
Specials	2	0.42%
Better Access	1	0.21%
Better Roads	1	0.21%
Brochures	1	0.21%
Clothing	1	0.21%
Entertainment	1	0.21%
Everything	1	0.21%
Friendlier	1	0.21%
Sidewalk Sales	1	0.21%
Variety	1	0.21%
Specific Responses	**210**	**43.66%**
N/A	**271**	**56.34%**
Total	**481**	**100.00%**

* The responses listed are unedited, they appear as recorded in the worksheets.

Total Respondents = 453
271 of the 453 Total Respondents (59.8%) offered no response (ie. N/A).
182 of the 453 Total Respondents (40.2%) generated 210 Specific Responses.

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 4C

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Response to Question #12 Summary

Q-12. What could the local cities do to make shopping on Woodward more enjoyable?

Responses *	#	%	Responses	#	%	Responses	#	%
Improve Parking	57	11.88%	Sidewalks	5	1.04%	Entertainment	1	0.21%
Appearance	21	4.38%	Better Roads	3	0.63%	Improve Goods	1	0.21%
Cleanliness	19	3.96%	Everything	3	0.63%	Organization	1	0.21%
Traffic	17	3.54%	Fix-Up Area	3	0.63%	Public Activities	1	0.21%
Safety	11	2.29%	Advertise	2	0.42%	Reduce Speed	1	0.21%
Nothing	10	2.08%	Clubs	2	0.42%	Sponsor Events	1	0.21%
Better Signs	8	1.67%	Decoration	2	0.42%	Variety	1	0.21%
Lighting	7	1.46%	Enforce Law	2	0.42%			
Pedestrian	7	1.46%	Friendlier	2	0.42%	**Specific Responses**	**217**	**45.21%**
Sales	7	1.46%	Art Shows	1	0.21%			
Better Access	6	1.25%	Better Service	1	0.21%	**N/A**	**263**	**54.79%**
Public Transportation	6	1.25%	Clothing	1	0.21%			
Atmosphere	5	1.04%				**Total**	**480**	**100.00%**

* The responses listed are unedited, they appear as recorded in the worksheets.

Total Respondents = 453
263 of the 453 Total Respondents (58.1%) offered no response (ie. N/A).
190 of the 453 Total Respondents (41.9%) generated 217 Specific Responses.

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 5

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Response to Question #3 Summary by mile segments

Q-3: Which places do you frequently visit on Woodward Avenue?

8-9 Mile East Side
Total respondents = 50

	Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Specific Responses:	47	0	12	2	10	3	12	27	3	116
Generic Responses:	0	0	1	0	0	2	1	0	0	4
Subtotal:	47	0	13	2	10	5	13	27	3	120

8-9 Mile West Side
Total respondents = 42

	Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Specific Responses:	23	3	7	1	3	6	4	10	8	65
Generic Responses:	7	0	2	1	1	3	3	2	2	21
Subtotal:	30	3	9	2	4	9	7	12	10	86

9-10 Mile East & West Side
** individual data for 9-10 Mile East and 9-10 Mile West were combined and reported.
Total respondents = 77

	Restaurant and Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Specific Responses:	44	0	14	5	12	2	9	36	9	131
Generic Responses:	7	0	1	1	0	0	8	5	0	22
Subtotal:	51	0	15	6	12	2	17	41	9	153

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993

Table 5 cont'd

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Response to Question #3 Summary by mile segments

Q-3: Which places do you frequently visit on Woodward Avenue?

10-11 Mile East Side
Total respondents = 23

	Restaurant and Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Specific Responses:	8	0	4	3	5	2	7	8	0	37
Generic Responses:	1	0	0	0	0	2	7	2	0	3
Subtotal:	9	0	4	3	5	4	14	10	0	40

10-11 Mile West Side
Total respondents = 25

	Restaurant and Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Specific Responses:	13	0	5	1	5	1	1	6	3	35
Generic Responses:	5	0	1	2	0	2	1	9	0	20
Subtotal:	18	0	6	3	5	3	2	15	3	55

11-12 Mile East Side
Total respondents = 33

	Restaurant and Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Specific Responses:	18	0	3	5	0	7	8	26	5	72
Generic Responses:	2	0	1	0	0	1	2	2	0	8
Subtotal:	20	0	4	5	0	8	10	28	5	80

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993

Table 5 cont'd

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Response to Question #3 Summary by mile segments

Q-3: Which places do you frequently visit on Woodward Avenue?

11-12 Mile West Side

Total respondents = 38

	Restaurant and Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Specific Responses:	17	1	3	2	2	1	8	32	5	71
Generic Responses:	10	0	0	0	0	4	9	9	0	32
Subtotal:	27	1	3	2	2	5	17	41	5	103

12-13 Mile East Side

Total respondents = 34

	Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Specific Responses:	18	0	6	4	1	1	1	26	5	62
Generic Responses:	2	1	0	0	1	0	0	1	0	5
Subtotal:	20	1	6	4	2	1	1	27	5	67

12-13 Mile West Side

Total respondents = 26

	Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Specific Responses:	7	0	0	1	1	5	6	7	6	33
Generic Responses:	3	0	0	0	0	0	2	1	0	6
Subtotal:	10	0	0	1	1	5	8	8	6	39

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993

Table 5 cont'd

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Response to Question #3 Summary by mile segments

Q-3: Which places do you frequently visit on Woodward Avenue?

13-14 Mile West Side
Total respondents = 20

	Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Specific Responses:	29	1	1	3	0	1	7	3	1	46
Generic Responses:	1	0	0	0	0	0	6	0	0	7
Subtotal:	30	1	1	3	0	1	13	3	1	53

14-15 Mile East Side
Total respondents = 45

	Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Specific Responses:	18	1	0	3	2	0	8	11	2	45
Generic Responses:	7	0	0	0	0	1	2	9	0	19
Subtotal:	25	1	0	3	2	1	10	20	2	64

14-15 Mile West Side
Total respondents = 40

	Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing / Cloth	Bank	Service	Other	N/A	Total
Specific Responses:	29	1	2	4	5	1	10	14	8	74
Generic Responses:	14	0	0	0	1	0	3	2	0	20
Subtotal:	43	1	2	4	6	1	13	16	8	94

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993

TABLE 6A (1)(E)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Responses to Question #3 by mile segments

8-9 Mile East Side
Total respondents = 50

Q-3. Which places do you frequently visit on Woodward Avenue ?

Specific Responses:

Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Rialto (8)		Perry D.S. (8)	Kroger	Gap (10)	Comerica (2)	Post Office (3)	Paperbacks Unlimited (9)		
Wendy's (7)		F&M (4)	Westborn MKT.		N.B.D.	Mobil Gas (3)	Harmony House (5)		
Como's (4)						Cleaners (2)	DMI (2)		
Big Boy (3)						Alpha Copy (2)	Blockbuster Video		
Hardees (3)						AAA	Capri Motel		
N.Y. Bagel (3)						Total Gas	Englander's		
Burger King (2)							Herb's Art Supply		
Clubhouse BBQ (2)							Jo-Ann Fabric		
Siam Spicy (2)							Metro Gift		
Denny's (1)							Opipari & Co.		
Beef Carver							Pet Supplies Plus		
Coffee Exchange							Rent-a-Center		
Cottage Inn							Royal Tropical		
Mc Donald's							Tuffy		
Midtown Cafe									
Moose Preserve									
Om Cafe									
Salvatore Scalopini									
Sneakers Pub									
Spagos									
Tubby's									
White Castle									
Total: 47	0	12	2	10	3	12	27	3	116

Generic responses:

Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
0	0	1	0	0	2	1	0	0	4
Total: 47	0	13	2	10	5	13	27	3	120

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 6A (2)(E)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY

Summary of Responses to Questions #10,11,12,13
by mile segments

8-9 Mile East Side

Q-10 . What new types of shops or services do you think would bring you here more often?

Restaurants	4
Entertainment	4
Clothing	4
Sporting Goods	3
Senior Discount	2
Discount	2
Book Store	2
Grocery	2
Retail	1
Gift Store	1
Shoe Store	1
Variety	1
Health Food	1
Outlet	1
Advertising	1
None	1
N/A	23
Total	**54**

Q-11. What could merchants do to bring you here more often?

Sales	4
Quality Goods	3
Discount	2
Make it Cleaner	1
Advertising	1
More Open Hrs.	1
Parking	1
Better Roads	1
Lower Prices	1
Better Servies	1
N/A	36
Total	**52**

Q-12. What could the local cities do to make shopping on Woodward more enjoyable?

Improve Parking	7
Sales	2
Lighting	2
City's Appearance	2
Better Roads	1
Clean-Up Stores	1
Cleaner	1
Advertising	1
Safer	1
Public Activities	1
None	1
N/A	31
Total	**51**

Q-13. In which city do you live?

Ferndale	48220 (12)				12
Royal Oak	48067 (4)	48073 (3)*			7
Detroit	48200 (2)	48224	48223	48203	5
Troy	48098	48084			2
Oak Park	48327 (2)				2
Birmingham	(2)*				2
Bloomfield Hills	48302				1
Hazel Park	48030				1
East Point	48021				1
Madison Heights	48071				1
Huntington Woods	48070				1
Clawson	48017				1
Franklin	48860				1
Novi	48076				1
N/A					12
Total					**50**

N/A denotes that no answer was given.
* Data is questionable.

TABLE 6A (1)(W)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY

Responses to Question #3 by mile segments

8-9 Mile West Side

Total respondents = 42

Q-3. Which places do you frequently visit on Woodward Avenue ?

Specific Responses:

Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Como's (3)	Magic Bag Thtr. (2)	Perry D.S. (6)	Westborn MKT.	Gap (3)	Comerica (5)	Jax Car Wash (3)	Charette (2)		
Rialto (3)	Breakers Billiards	F&M			N.B.D.	Dewalt Real Estate	Jo-Ann Fabric (2)		
Taco Bell (3)							Blockbuster Video		
Clubhouse BBQ (2)							Ferndale One Stop		
Anna's Coffee Shop							John K. King		
Big Boy							Tait Ove		
Coney Island							Target Sport		
Duggan's							Tropical Fish Pond		
Golden Star Chop Suey									
N.Y. Bagel									
Om Cafe									
Onion Roll Deli									
Pizza-Hut									
Pub 1881									
Sneakers Pub									
Wendy's									
Total: 23	3	7	1	3	6	4	10	8	65

Generic responses:

Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
7	0	2	1	1	3	3	2	2	21
Total: 30	3	9	2	4	9	7	12	10	86

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 6A (2)(W)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Summary of Responses to Questions #10,11,12,13
by mile segments

8-9 Mile West Side

Q-10 . What new types of shops or services do you think would bring you here more often?

Restaurants	11
Clothing	4
Sports	2
Movie Theater	2
Hardware	2
Grocery	1
Everything	3
N/A	18
Total	**43**

Q-11. What could merchants do to bring you here more often?

Advertising	6
Make it Look Better	5
Sales	3
Restaurant	2
Lower prices	2
Coupons	1
Brochures	1
Parking	1
More Open Hrs.	1
Nothing	2
Everything	1
N/A	19
Total	**44**

Q-12. What could the local cities do to make shopping on Woodward more enjoyable?

Improve Parking	4
Better Traffic	3
Pedestrian	2
Look Nicer	2
Enforce the Law	2
Better Public Tran.	1
Advertising	1
Better Goods	1
Clothing	1
Sales	1
Promotion Gimmicks	1
Everything	2
Nothing	4
N/A	17
Total	**42**

Q-13. In which city do you live?

Ferndale	48220 (8)	48238		9
Detroit	48221 (3)	48204	48203	5
Royal Oak	48067 (3)	48073 (2)		5
Southfield	48075 (2)	48034	48076	4
Sterling Heights	48310	48313		3
Highland Park	48203 (2)			2
Oak Park	48237			1
Grosse Pointe	48236			1
Farmington Hills	48331			1
Warren	48093			1
Port Huron	48860			1
Bloomfield Hills	48302			1
Hamtramck	48212			1
N/A				7
Total				**42**

N/A denotes that no answer was given.

TABLE 6B (2)(E&W)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Summary of Responses to Questions #10,11,12,13
by mile segments

9-10 Mile East & West Side

Q-10. What new types of shops or services do you think would bring you here more often?

Clubs	9
Restaurants	6
Entertainment	5
MKT.	3
Grocery	3
Department Store	3
Clothing	3
Malls	3
Hardware	2
Electronic	1
Music	1
Health Club	1
More Bars	1
Nothing	2
N/A	37
Total	**80**

Q-11. What could merchants do to bring you here more often?

Make it look better	16
Advertising	13
Sales	6
Parking	4
Reduced Prices	2
Improve Service	2
More Safety	1
None	1
N/A	37
Total	**82**

Q-12. What could the local cities do to make shopping on Woodward more enjoyable?

Parking	11
Look Cleaner	9
Safety	4
Improve Roads	2
More Open Hrs.	2
More Clubs	2
Sponsor Event	1
Sales	1
Lights	1
Pedestrians	1
Nothing	2
N/A	45
Total	**81**

Q-13. In which city do you live?

Detroit	48223 (3)	48221 (3)	48228 (3)	48224 (2)	11
Royal Oak	48067 (3)	48073 (3)*			6
Ferndale	48220(5)				5
Southfield	48075 (3)				3
Sterling Heights	48313 (2)	48314			3
Pleasant Ridge	48069 (3)				3
Farmington Hills	48336	48331			2
Troy	48098 (2)				2
Oak Park	48237 (2)				2
Highland Park	48203 (2)				2
Warren	48089	48093			2
Beverly Hills	48025				1
Rochester Hills	48309				1
Ortonville	48462				1
Northville	48170				1
St. Clair Shores	48082				1
Bloomfield Hills	48302				1
Livonia	48150				1
Redford	48239				1
Flint	*				1
Berkley	48072				1
Huntington Woods	48070				1
Birmingham	48009				1
Novi	48375				1
N/A					23
Total					**77**

N/A denotes that no answer was given.
* Data is questionable.

TABLE 6B (1)(E&W)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY

Responses to Question #3 by mile segments

9-10 Mile East & West Side

Total respondents = 77

Q-3. Which places do you frequently visit on Woodward Avenue ?

Specific Responses:

Restaurant and Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Athen's Coney (4)		Perry D.S. (10)	Westborn MKT. (4)	Gap (12)	Comerica	Murray's Auto (2)	DMI (6)		
Spagos (4)		F&M (4)	Betty's (Health Food)		Standard Federal	W. Brock Hair (2)	Jo- Ann Fabric (5)		
Pizza-Hut (3)						Fantastic Sam	Herb's Art Supply (4)		
Arby's (2)						Mobile Gas	Pier One Imports (3)		
Big Boy (2)						Remax Realty	Harmony House (2)		
Burger King(2)						Speedway Gas	Alcove Hobby Shop		
Duggan's (2)							Beckwith Evans		
Dunkin Dounuts (2)							Blockbuster Video		
Magic Bag Cafe (2)							Discount Fabric		
Moose Preserve (2)							Dunham's		
Pasquale's (2)							Englander's		
Tony's Sports Bar (2)							Golf Shop		
Avenue Cafe							Northwood Shop. Ctr.		
Bagel Shop							N.W. Tune Up		
Chicken Shack							Pet Supplies Plus		
Clubhouse BBQ							Radio Shack		
Coffee Exchange							Self Esteem Shop		
Denny's							Sound Warehouse		
Hardees							Tony's Sport		
Mc Donald's							Tuffy		
N.Y. Bagel							Uneek Boutique		
Ram's Horn							Zoo		
Taco Bell									
Tai Restaurant									
The Eatery									
Wendy's									
White Castle									
Total: 44	**0**	**14**	**5**	**12**	**2**	**9**	**36**	**9**	**131**

Generic responses:

Restaurant and Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
7	0	1	1	0	0	8	5	0	22
Total: 51	**0**	**1**	**1**	**0**	**0**	**8**	**5**	**0**	**22**

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 6C (1)(E)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY

Responses to Question #3 by mile segments

10-11 Mile East Side

Total respondents = **23**

Q-3. Which places do you frequently visit on Woodward Avenue ?

Specific Responses:

Restaurant and Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Burger King (3)		Perry D.S. (2)	Westborn MKT. (3)	Gap (5)	N.B.D. (2)	Jax Car Wash (2)	DMI (2)	0	
Wendy's (3)		F&M (2)				Murray's Auto (2)	Charrette		
Big Boy						B.P. Gas	Mickey Shore		
The Eatery						Eye Glass Factory	Radio Shack		
						Mobil Gas	Sam's Jam's		
							Sherwin Williams		
							Zoo		
Total:									
8	**0**	**4**	**3**	**5**	**2**	**7**	**8**	**0**	**37**

Generic responses:

Restaurant and Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
1	0	0	0	0	0	0	2	0	3
Total:									
9	**0**	**4**	**3**	**5**	**2**	**7**	**10**	**0**	**40**

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 6C (2)(E)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Summary of Responses to Questions #10,11,12,13
by mile segments

10-11 Mile East Side

Q-10. What new types of shops or services do you think would bring you here more often?	
Retail	5
Pet Store	1
Shoe Repair	1
Better Service	1
Hardware	1
Resaturant	1
Build. Supply Store	1
Cake Decoration	1
N/A	11
Total	**23**

Q-11. What could merchants do to bring you here more often?	
Sales	5
Parking	2
Better Service	1
Side Walk	1
Cleaner	1
N/A	13
Total	**23**

Q-12. What could the local cities do to make shopping on Woodward more enjoyable?	
Security	2
Friendly	1
Nicer	1
Art Shows	1
N/A	18
Total	**23**

Q-13. In which city do you live?		
Royal Oak	48067 (5)	5
Clawson	48017 (3)	3
Ferndale	48220 (2)	2
Troy	48098	1
Huntington Woods	48070	1
Berkley	*	1
N/A		10
Total		**23**

N/A denotes that no answer was given.
* Data is questionable.

TABLE 6C (1)(W)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY

Responses to Question #3 by mile segments

10-11 Mile West Side

Total respondents = 25

Q-3. Which places do you frequently visit on Woodward Avenue ?

Specific Responses:

Restaurant and Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Big Boy (3)		Perry D.S. (4)	Westborn MKT.	Gap (4)	N.B.D.	Jax Car Wash	Thrifty Flowers (3)		
Duggan's (2)		F&M		Winkleman's			DMI		
Mc Donald's (2)							Blockbuster Video		
Beef Carver							Target Sport		
Four Green Fields									
Maverick's									
House of Pancake									
Pasquale's									
Pub 1881									
Total: 13	0	5	1	5	1	1	6	3	35

Generic responses:

Restaurant and Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
5	0	1	2	0	2	1	9	0	20
Total: 18	0	6	3	5	3	2	15	3	55

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 6C (2)(W)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY

Summary of Responses to Questions #10,11,12,13
by mile segments

10-11 Mile West Side

Q-10 . What new types of shops or services do you think would bring you here more often?

Retail	2
Clothing	2
Restaurants	1
Hardware	1
Shows	1
More Open Hrs.	1
N/A	17
Total	**25**

Q-11. What could merchants do to bring you here more often?

Advertising	3
Clothing	1
Sales	1
Variety	1
Friendly	1
Better Access	1
N/A	17
Total	**25**

Q-12. What could the local cities do to make shopping on Woodward more enjoyable?

Parking	4
Cleaner	2
Improve Traffic	1
Safer	1
Lighting	1
Variety	1
Look Better	1
Better Access	1
N/A	13
Total	**25**

Q-13. In which city do you live?

Royal Oak	48067 (2)		2
Southfield	48075	48076	2
Berkley	48072		1
Detroit	48225		1
Pontiac	48341		1
Oak Park	48237		1
Huntington Woods	48070		1
Pleasant Ridge	48069		1
N/A			15
Total			**25**

N/A denotes that no answer was given.

TABLE 6D (1)(E)

WOODWARD AVENUE CORIDOR STUDY: SHOPPERS SURVEY

Responses to Question #3 by mile segments

11-12 Mile East Side

Total respondents = 33

Q-3. Which places do you frequently visit on Woodward Avenue ?

Specific Responses:

Restaurant and Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
House of Pancake (3)		Perry D.S. (2)	Westborn MKT.		N.B.D. (4)	Jax Car Wash (3)	Harmony House (7)		
Mc Donald's (3)		F&M			Bank of Royal Oak	B.P. Gas (2)	DMI (5)		
Burger King (2)					Nat'l City Bank	Murray's Auto (2)	Blockbuster Video (3)		
Duggan's					First of America	Marathon Gas	Alcove Hobby Shop		
N.Y. Bagel (2)							Battles Liq. Store		
Subway (2)							Lewis Art Supply		
Big Boy							Pet Supplies Plus		
Buddy's Pizza							Pier One Imports		
New Way Bar							Rec. Diving		
Super Sub Shop							Sears		
							Shopper's World		
							Sound Warehouse		
							Wild Birds		
							Woodward Camera		
Total:									
18	**0**	**3**	**5**	**0**	**7**	**8**	**26**	**5**	**72**

Generic responses:

Restaurant and Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
2	0	1	0	0	1	2	2	0	8
Total:									
20	**0**	**4**	**5**	**0**	**8**	**10**	**28**	**5**	**80**

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 6D (2)E)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY

Summary of Responses to Questions #10,11,12,13
by mile segments

11-12 Mile East Side

Q-10. What new types of shops or services do you think would bring you here more often?

Special Store	2
Sporting Goods	2
Restaurants	1
Clothing	1
Entertainment	1
Higher Class	1
Recreation Shop	1
Show Store	1
Art Galaries	1
Book Store	1
Shoe Store	1
Intimate Shopping	1
N/A	21
Total	**35**

Q-11. What could merchants do to bring you here more often?

Parking	3
Sales	3
Better Service	1
Entertainment	1
Better Looking	1
N/A	24
Total	**33**

Q-12. What could the local cities do to make shopping on Woodward more enjoyable?

Improved Traffic	6
Better Looking	4
Side Walk	3
Parking	2
Landscaping	1
Sales	1
Reduce Speed	1
Entertainment	1
N/A	20
Total	**39**

Q-13. In which city do you live?

Southfield	48034 (3)	48075 (2)	48076 (2)*	7
Royal Oak	48067 (3)	48070 (2)	48073 *	6
Berkley	48072 (2)	48071 (2)*		4
Warren	48084			3
Ferndale	48220 (2)			2
Huntington Woods	48070 (2)*			2
Sterling Heights	48312			1
Clinton TWP.	48038	48036	48035	1
Dearborn Heights	48127	48125		1
Bloomfield Hills	48304			1
Oak Park	48237			1
Detroit	*			1
Birmingham	48009			1
N/A				2
Total				**33**

N/A denotes that no answer was given.
* Data is questionable.

TABLE 6D (1)(W)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Responses to Question #3 by mile segments

11-12 Mile West Side

Total respondents = 38

Q-3. Which places do you frequently visit on Woodward Avenue ?

Specific Responses:

Restaurant and Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Denny's (3)	State Fair Grounds	F&M (2)	Westborn MKT.	Gap (2)	First of America	Jax Car Wash (5)	Harmony House (12)		
Burger King (2)		Perry D.S.				Murray's Auto (2)	Alcove Hobby Shop (3)		
Picadilly's (2)						Beaumont Hospital	Blockbuster Video (3)		
Siam Spicy (2)							DMI (2)		
Big Boy							Pro Foto (2)		
Birmingham Tavern							Sound Warehouse (2)		
Maverick's							Century Camera		
Mc Donald's							Charette		
House of Pancake							Cigarette Outlet		
Pub 1881							Northwood Shop. Ctr.		
Sero's Restaurant							Pet Supplies Plus		
Sly Fox							Radio Shack		
							Target Sport		
							Woodworkers Shop		
Total:									
17	**1**	**3**	**2**	**2**	**1**	**8**	**32**	**5**	**71**

Generic responses:

Restaurant and Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
10	0	0	0	0	4	9	9	0	32
Total:									
27	**1**	**3**	**2**	**2**	**5**	**17**	**41**	**5**	**103**

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 6D (2)(W)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Summary of Responses to Questions #10,11,12,13
by mile segments

11-12 Mile West Side

Q-10 . What new types of shops or services do you think would bring you here more often?

Restaurants	3
Retail	2
Clothing	2
Sporting Goods	1
Birmingham	1
Gas Station	1
Gift Store	1
Boating	1
Malls	1
None	2
N/A	25
Total	**40**

Q-11. What could merchants do to bring you here more often?

Sales	5
Specials	2
Parking	2
Reduced Prices	2
Better Service	2
Better Signs	1
Advertising	1
Coupons	1
None	2
N/A	22
Total	**40**

Q-12. What could the local cities do to make shopping on Woodward more enjoyable?

Better Atmosphere	5
Parking	4
Decoration	2
Better Signs	2
Fix it Up	3
Lighting	2
Organize	1
Sidewalk	1
Shuttle	1
Improve Traffic	1
Security	1
N/A	20
Total	**38**

Q-13. In which city do you live?

Birmingham	48025 (8)*		8
Royal Oak	48073 (4)	48067 (2)	6
Southfield	48075 (3)	48076	4
Warren	48092 (2)		2
Berkley	48480 (2)		2
Troy	48083	48084	2
Huntington Woods	48070		1
Farmington Hills	48331	48334	1
Detroit	*		1
Auburn Hills	48326		1
Garden City	48135		1
Waterford	48329		1
Ferndale	48220		1
Bloomfield Hills	48302		1
West Bloomfield	48322		1
N/A			5
Total			**38**

N/A denotes that no answer was given.
* Data is questionable.

TABLE 6E (1)(E)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Responses to Question #3 by mile segments

12-13 Mile East Side

Total respondents = **34**

Q-3. Which places do you frequently visit on Woodward Avenue ?

Specific Responses:

Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Mc Donald's (3)		Perry D.S. (5)	Kroger (3)	Winkleman's	NW Trans C.U.	Pet Clips	Northwood Shop. Ctr. (6)		
Super Sub Shop (2)		F&M	Westborn MKT.				Pet Supplies Plus (4)		
Wendy's (2)							Woodworkers Shop (4)		
Alban's							Target Sport (3)		
Arby's							Harmony House (2)		
Big Boy							Pier One Imports (2)		
Duggan's							Alcove Hobby Shop		
Ground Round							Century Camera		
Pasquale's							Englander's		
Ram's Horn							Expressions Cust. Furn.		
Siam Spicy							Liechtung Tools		
Taco Bell									
TCBY Yogurt									
The Eatery									
Total:									
18	**0**	**6**	**4**	**1**	**1**	**1**	**26**	**5**	**62**

Generic responses:

Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
2	1	0	0	1	0	0	1	0	5
Total:									
20	**1**	**6**	**4**	**2**	**1**	**1**	**27**	**5**	**67**

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 6E (2)(E)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Summary of Responses to Questions #10,11,12,13
by mile segments

12-13 Mile East Side

Q-10 . What new types of shops or services do you think would bring you here more often?

Clothing	4
Food Service	3
Club	2
Retail	2
Recreation Facility	1
Mall	1
N/A	23
Total	**36**

Q-11. What could merchants do to bring you here more often?

Parking	7
Sales	4
Reduced Prices	2
More Open Hrs.	1
Improve Service	1
Make it Nicer	1
N/A	22
Total	**38**

Q-12. What could the local cities do to make shopping on Woodward more enjoyable?

Parking	6
Pedestrian	2
Friendly	1
Nicer	1
Better Traffic	1
Public Tran.	1
N/A	23
Total	**35**

Q-13. In which city do you live?

Ferndale	48220 (7)		7
Royal Oak	48073 (3)	48067	4
St. Clair Shores	48082 (2)	48080	3
Mt. Clemens	48042 (2)		2
Birmingham	48009 (2)		2
Roseville	48066 (2)		2
Detroit	48202		1
Warren	48092		1
Romeo	48094		1
Troy	48084		1
Winsdor	*		1
Huntington Woods	48070		1
Rochester	48307		1
Hazel Park	48030		1
Pleasant Ridge	48069		1
N/A			5
Total			**34**

N/A denotes that no answer was given.
* Data is questionable.

TABLE 6E (1)(W)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY

Responses to Question #3 by mile segments

12-13 Mile West Side

Total respondents = **26**

Q-3. Which places do you frequently visit on Woodward Avenue ?

Specific Responses:

Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
House of Pancake (3)			Party Time	Fashion Bug	First of America (3)	B.P. Gas (2)	Manus Power Mowers (2)		
Chicken Shack (2)					Credit Union (2)	Murray's Auto (2)	Northwood Shop. Ctr. (2)		
Golden Basket						Marathon Gas	DMI		
Wendy's						Remax Realty	Radio Shack		
							Tuffy		
Total:									
7	**0**	**0**	**1**	**1**	**5**	**6**	**7**	**6**	**33**

Generic responses:

Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
3	0	0	0	0	0	2	1	0	6
Total:									
10	**0**	**0**	**1**	**1**	**5**	**8**	**8**	**6**	**39**

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 6E (2)(W)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Summary of Responses to Questions #10,11,12,13
by mile segments

12-13 Mile West Side

Q-10 . What new types of shops or services do you think would bring you here more often?

Food Service	3
Clothing	2
Malls	2
Clubs	1
N/A	18
Total	**26**

Q-11. What could merchants do to bring you here more often?

Reduced Prices	5
Parking	1
Safer	1
Look Nicer	1
Side Walk	1
N/A	17
Total	**26**

Q-12. What could the local cities do to make shopping on Woodward more enjoyable?

Look Nicer	4
Parking	1
Safer	1
Service Drive	1
Bus Tran.	1
N/A	18
Total	**26**

Q-13. In which city do you live?

Royal Oak	48073 (6)*	6
Berkley	48072 (5)*	5
Oak Park	48237	1
Southfield	48034	1
Ferndale	*	1
Birmingham	*	1
Clawson	48017	1
Lake Orion	48362	1
N/A		9
Total		**26**

N/A denotes that no answer was given.
* Data is questionable.

TABLE 6F (1)(W)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY

Responses to Question #3 by mile segments

13-14 Mile West Side

Total respondents = 20

Q-3. Which places do you frequently visit on Woodward Avenue ?

Specific Responses:

Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Mc Donald's (8)	Billy Bob's	F&M	Westborn MKT.		Comerica	Mobil (3)	DMI		
Burger King (5)			Kroger			Birm. Cleaners (2)	Northwood Shop. Ctr.		
Arby's (3)			Oasis Conv. Store			Beaumont Hospital	Mickey Shores		
Four Green Fields (3)						Walsh & Assoc.			
Ground Round (2)									
N.Y. Bagel (2)									
Beef Carver									
Big Boy									
Duggan's									
Kentucky Fried Chicken									
Maverick's									
Woodward Grill									
Total:									
29	**1**	**1**	**3**	**0**	**1**	**7**	**3**	**1**	**46**

Generic responses:

Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
1	0	0	0	0	0	6	0	0	7
Total:									
30	**1**	**1**	**3**	**0**	**1**	**13**	**3**	**1**	**53**

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 6F (2)(W)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Summary of Responses to Questions #10,11,12,13
by mile segments

13-14 Mile West Side

Q-10. What new types of shops or services do you think would bring you here more often?

Retail	2
Entertainment	2
Restaurants	1
Supermarkets	1
N/A	14
Total	20

Q-11. What could merchants do to bring you here more often?

Sales	7
Parking	2
More Open Hrs.	2
More Business	2
Advertising	1
N/A	8
Total	22

Q-12. What could the local cities do to make shopping on Woodward more enjoyable?

Better looking	5
Parking	4
Improve Traffic	2
Improve Access	2
Cleaner	2
Side Walk	1
N/A	8
	1
Total	25

Q-13. In which city do you live?

Birmingham	48009 (6)		6
Royal Oak	48073 (4)	48067 (2)	6
Detroit	48238 (2)		2
Dearborn Heights	48125		1
Bloomfield Hills	48302		1
Beverly Hills	48025		1
New Baltimore	48047		1
N/A			2
Total			20

N/A denotes that no answer was given.

TABLE 6G (1)(E)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY
Responses to Question #3 by mile segments

14-15 Mile East Side

Total respondents = 45

Q-3. Which places do you frequently visit on Woodward Avenue ?

Specific Responses:

Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Alban's (5)	Theater		West Born MKT. (2)	Jacobson's		Jax Car Wash (3)	Harmony House (3)		
Peabody's (3)			Betty's (Health Food)	Hit or Miss		AAA	Arizona Saddlery		
Little Caesar's (2)						New You Salon	Bellini Juvenile Furnit.		
Sly Fox (2)						Print World	Blockbuster Video		
Birmingham Tavern						Shell Gas	Dorcey Florist		
Coney Island						Unocal Gas	Expressions Cust. Furn.		
Golden Basket							Hunter House		
Maverick's							Solo Records & Tapes		
House of Pancake							The Bombay Co.		
Ram's Horn									
Total:									
18	**1**	**0**	**3**	**2**	**0**	**8**	**11**	**2**	**45**

Generic responses:

Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
7	0	0	0	0	1	2	9	0	19
Total:									
25	**1**	**0**	**3**	**2**	**1**	**10**	**20**	**2**	**64**

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 6G (2)(E)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY

Summary of Responses to Questions #10,11,12,13
by mile segments

14-15 Mile East Side

Q-10 . What new types of shops or services do you think would bring you here more often?

Specialty Store	2
Restaurants	2
Grocery	2
Diversity	1
Computer	1
Music	1
Drug	1
Video	1
Clothing	1
None	4
N/A	29
Total	**45**

Q-11. What could merchants do to bring you here more often?

Sales	4
More open Hrs.	4
Better Signs	3
Advertising	2
Parking	1
Side Walk Sales	1
Better Service	1
Reduced Prices	1
Clean Up	1
Nothing	4
N/A	23
Total	**45**

Q-12. What could the local cities do to make shopping on Woodward more enjoyable?

Parking	6
Better Signs	6
Improve Traffic	3
Clean Up	2
Pedestrians	2
Better Access	2
Better Service	1
Variety	1
Bet. Public Tran.	1
Nothing	1
N/A	20
Total	**45**

Q-13. In which city do you live?

Birmingham	48009 (4)	48025	5
Royal Oak	48073 (3)	48070	4
Oak Park	48237 (3)		3
Novi	48374 (2)*		2
Hazel Park	48030		1
Waterford	48327		1
Dearborn	48126		1
Madison Heights	48071		1
Ann Arbor	48103		1
Macomb	48044		1
Lake Orion	48360		1
Huntington Woods	48070		1
Windsor	*		1
Pleasant Ridge	48069		1
Toledo	*		1
N/A			20
Total			**45**

N/A denotes that no answer was given.
* Data is questionable.

TABLE 6G (1)(W)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY

Responses to Question #3 by mile segments

14-15 Mile West Side

Total respondents = 40

Q-3. Which places do you frequently visit on Woodward Avenue ?

Specific Responses:

Restaurant & Bars	Entertainment	Drug Stores	Grocery	Clothing	Bank	Service	Other	N/A	Total
Olga's (4)	Billy Bob's	Perry D.S. (2)	Kroger (4)	Hit or Miss (3)	Comerica	Jax Car Wash (5)	Downtown (3)		
Bennigan's (2)			Party Time	Jacobson's (2)		AT & T	Sound Warehouse (2)		
Coffee Exchange (2)			Westborn MKT.	Crowley's		Auto Sound	DMI (2)		
Peabody's (2)						Speedy Printing	Alcove Hobby Shop		
Alban's						Tom Jones T.V.	Blockbuster Video		
Arby's						Uncle Ed's Oil	Expressions Custom Furn.		
Beef Carver							Green's Artist Supply		
Big Boy							Henderson Glass		
Boston Chicken							Target Sport		
Coney Island							Zoo		
Cottage Inn									
Duggan's									
Ground Round									
Kentucky Fried Chicken									
Little Caeser's									
Marverick's									
Mc Donald's									
Mid Town Cafe									
N.Y. Bagel									
Pizza-Hut									
Sly Fox									
Taco Bell									
Woodward Grill									
Total: 2	1	2	4	5	1	10	14	8	74

Generic Responses:

Restaurant & Bars	Entertainment	Drug Stores	Grocery	Cloth	Bank	Service	Other	N/A	Total
14	0	0	0	1	0	3	2	0	20
Total: 4	1	2	4	6	1	13	16	8	94

Source: Shoppers Survey conducted by Lawrence Technological University in December, 1993.

TABLE 6G (2)(W)

WOODWARD AVENUE CORRIDOR STUDY: SHOPPERS SURVEY

Summary of Responses to Questions #10,11,12,13
by mile segments

14-15 Mile West Side

Q-10 . What new types of shops or services do you think would bring you here more often?

Restaurants	8
Entertainment	7
Clothing	6
Sporting Goods	3
Movie theater	2
Book Store	2
Grocery	2
Retail	1
Gift Store	1
Shoe Store	1
Everything	2
Nothing	2
N/A	19
Total	**56**

Q-11. What could merchants do to bring you here more often?

Discount	6
Sales	6
Quality goods	3
Make it cleaner	1
Advertising	1
More open Hrs.	1
N/A	33
Total	**51**

Q-12. What could the local cities do to make shopping on Woodward more enjoyable?

Improve Parking	8
Sales	2
Lighting	1
Safety	1
Clean-Up Stores	1
Cleaner	1
Everything	1
Nothing	2
N/A	30
Total	**51**

Q-13. In which city do you live?

Birmingham	48009 (4)	48025 (4)*	8
Royal Oak	48073 (5)	48070 (3)*	8
Oak Park	48237 (3)		3
Novi	48374 (2)*		2
Hazel Park	48030		1
Waterford	48327		1
Dearborn	48126		1
Madison Heights	48071		1
Ann Arbor	48103		1
Macomb	48044		1
Lake Orion	48360		1
Windsor	*		1
Pleasant Ridge	48069		1
Toledo	*		1
Huntington Woods	48070		1
N/A			8
Total			**40**

N/A denotes that no answer was given.
* Data is questionable.

TABLE 7-A
LICENSE PLATE SURVEY: SUMMARY
Residency by City & County

PARTICIPATING CITIES:

Berkley	22	
Birmingham	24	
Ferndale	50	
Huntington Woods	14	
Pleasant Ridge	13	
Royal Oak	59	
Total		182

OTHER CITIES:

OAKLAND COUNTY:

Auburn Hills	3		
Bev. Hills, Franklin, Bingham Farms	10		
Bloomfield	19		
Bloomfield Hills	11		
Clarkston	7		
Clawson	8		
Commerce Township	3		
Farmington	3		
Farmington Hills	9		
Hazel Park	16		
Holly	1		
Madison Heights	8		
Milford	3		
New Hudson	1		
Novi	2		
Oak Park	21		
Ortonville	1		
Oxford	1		
Pontiac	2		
Rochester	7		
Rochester Hills	2		
Southfield	24		
South Lyon	2		
Troy	38		
Walled Lake	2		
Waterford	3		
West Bloomfield	15		
White Lake	4		
Wixom	1		
Total		227	
Total Oakland County			409

OTHER CITIES cont'd:

WAYNE COUNTY:

Allen Park	1	
Belleville	1	
Canton	1	
Dearborn	18	
Dearborn Heights	2	
Detroit	61	
Garden City	1	
Grosse Pointe	4	
Hamtramck	2	
Highland Park	11	
Livonia	14	
Northville	3	
Plymouth	1	
Taylor	1	
Trenton	1	
Westland	3	
Wyandotte/Riverview	1	
Total		126

MACOMB COUNTY:

Clinton Township	2	
East Pointe	1	
New Baltimore	1	
New Haven	1	
Roseville	4	
Shelby	1	
Sterling Heights	11	
St. Clair Shores	6	
Utica	2	
Warren	19	
Total		50

ALPENA COUNTY:

Hubbard Lake	1
Total	1

BARRY COUNTY:

Delton	1
Total	1

Table 7A cont'd:

CALHOUN COUNTY:	
Battle Creek	1
Total	1
CHEBOYGAN COUNTY:	
Cheboygan	1
Indian River	1
Total	2
CHIPPEWA COUNTY:	
Eckerman	1
Total	1
EMMETT COUNTY:	
Alanson	1
Total	1
GENESEE COUNTY:	
Attica	1
Flushing	1
Flint	1
Total	3
GLADWIN COUNTY:	
Beaverton	1
Total	1
IOSCO COUNTY:	
East Tawas	1
National City	2
Total	3
JACKSON COUNTY:	
Michigan Center	1
Total	1
LAPEER COUNTY:	
Metamora	2
Silverwood	1
Total	3
LENAWEE COUNY:	
Tecumseh	1
Total	1
LIVINGSTON COUNTY:	
Brighton	2
Total	2
MECOSTA COUNTY:	
Stanwood	1
Total	1
OGEMAW COUNTY:	
West Branch	1
Total	1
OTSEGO COUNTY:	
Elmira	1
Total	1
SHIAWASSEE COUNTY:	
Owosso	1
Total	1
S T. CLAIR COUNTY:	
Algonac	1
Almont	1
Fair Haven	1
Marine City	2
Yale	1
Total	6
TUSCOLA COUNTY:	
Vassar	1
Total	1
WASHTENAW COUNTY:	
Ann Arbor	1
Ypsilanti	1
Total	2

Table 7B cont'd

Wayne	Detroit	48207	2	MI					1		1	
Wayne	Detroit	48211	2	MI							1	1
Wayne	Detroit	48219	2	MI						1	1	
Wayne	Detroit	48221	12	MI	1	1		1			8	1
Wayne	Detroit	48206	3	MI							3	
Wayne	Detroit	48224	1	MI						1		
Wayne	Detroit	48210	1	MI					1			
Wayne	Detroit	48228	3	MI				1			2	
Wayne	Detroit	48232	1	MI				1				
Wayne	Detroit	48234	3	MI					1		2	
Wayne	Detroit	48235	6	MI							6	
Wayne	Detroit	48238	3	MI							2	1
Wayne	Detroit	48239	2	MI					1	1		
Wayne	Detroit	48240	3	MI		1				1	1	
Wayne	Detroit	48223	2	MI					2			
Wayne	Detroit	48204	2	MI					1		1	
Wayne	Detroit	48202	2	MI					1		1	
Wayne	Detroit	48201	1	MI						1		
Wayne	Detroit	48205	3	MI				1		1	1	
Wayne	Detroit	48213	1	MI					1			
Wayne	Garden City	48135	1	MI		1						
Wayne	Grosse Pointe	48230	2	MI								2
Wayne	Grosse Pointe	48236	2	MI	1	1						
Wayne	Hamtramck	48212	2	MI			1		1			
Wayne	Highland Park	48203	11	MI		1			1	1	3	5
Wayne	Livonia	48150	4	MI	1	1					2	
Wayne	Livonia	48152	5	MI	2		1			1	1	
Wayne	Livonia	48153	1	MI						1		
Wayne	Livonia	48154	4	MI				1	2		1	
Wayne	Northville	48167	3	MI	1	1		1				
Wayne	Plymouth	48170	1	MI					1			
Wayne	Taylor	48180	1	MI		1						
Wayne	Trenton	48183	1	MI		1						
Wayne	Westland	48185	3	MI							3	
Wayne	Wyand,Riverview	48192	1	MI								1

Table 7B cont'd

Oakland	Troy	48084	22	MI	4	3	3	1	3	2	4	2
Oakland	Troy	48083	8	MI	1	1	1		4	1		
Oakland	Troy	48098	7	MI		2	2			2		1
Oakland	Troy	48099	1	MI	1							
Oakland	Walled Lake	48390	2	MI			1					1
Oakland	Waterford	48329	2	MI							1	1
Oakland	Waterford	48327	1	MI	1							
Oakland	West Bloomfield	48323	5	MI	1	1	1	1				1
Oakland	West Bloomfield	48322	8	MI	1	2	1	2	1			1
Oakland	West Bloomfield	48324	2	MI				1				1
Oakland	White Lake	48383	2	MI				2				
Oakland	White Lake	48386	2	MI			2					
Oakland	Wixom	48393	1	MI				1				
Ogemaw	West Branch	48661	1	MI	1							
Otsego	Elmira	49730	1	MI					1			
Shiawassee	Owosso	48867	1	MI				1				
St. Clair	Algonac	48001	1	MI	1							
St. Clair	Almont	48003	1	MI					1			
St. Clair	Fair Haven	48023	1	MI							1	
St. Clair	Marine City	48039	2	MI					1	1		
St. Clair	Yale	48097	1	MI							1	
Tuscola	Vassar	48768	1	MI			1					
Washtenaw	Ann Arbor	48105	1	MI							1	
Washtenaw	Ypsilanti	48197	1	MI								1
Wayne	Allen Park	48101	1	MI					1			
Wayne	Belleville	48111	1	MI					1			
Wayne	Canton	48187	1	MI						1		
Wayne	Dearborn	48120	1	MI			1					
Wayne	Dearborn	48121	11	MI	2	2	1		3		2	1
Wayne	Dearborn	48124	1	MI			1					
Wayne	Dearborn	48126	4	MI				1		1	2	
Wayne	Dearborn	48128	1	MI	1							
Wayne	Dearborn Heights	48127	2	MI				1			1	
Wayne	Detroit	48214	2	MI		1			1			
Wayne	Detroit	48227	4	MI		1	1	1		1		

Table 7B cont'd

Oakland	Bloomfield Hills	48303	1	MI							1	
Oakland	Clarkston	48348	2	MI		2						
Oakland	Clarkston	48346	5	MI	1		2	1			1	
Oakland	Clawson	48017	8	MI			4	2	2			
Oakland	Commerce Twp	48382	3	MI				1	1		1	
Oakland	Farmington	48336	2	MI			1		1			
Oakland	Farmington	48335	1	MI					1			
Oakland	Farmington Hills	48334	7	MI	2				4		1	
Oakland	Farmington Hills	48331	2	MI								2
Oakland	Ferndale	48220	50	MI			1	2	5	5	20	17
Oakland	Hazel Park	48030	16	MI		1		4	3	2	4	2
Oakland	Holly	48442	1	MI			1					
Oakland	Huntington Woods	48070	14	MI	2		1	1	4	5	1	
Oakland	Madison Heights	48071	8	MI			1			1	4	2
Oakland	Milford	48381	2	MI				1			1	
Oakland	Milford	48380	1	MI		1						
Oakland	New Hudson	48165	1	MI			1					
Oakland	Novi	48377	1	MI		1						
Oakland	Novi	48375	1	MI							1	
Oakland	Oak Park	48237	21	MI	1	1	2	1	4	1	5	6
Oakland	Ortonville	48462	1	MI	1							
Oakland	Oxford	48371	1	MI	1							
Oakland	Pleasant Ridge	48069	13	MI	2				3	1	7	
Oakland	Pontiac	48341	2	MI		1			1			
Oakland	Rochester	48307	4	MI			3				1	
Oakland	Rochester	48306	3	MI	1					1	1	
Oakland	Rochester Hills	48309	2	MI					1		1	
Oakland	Royal Oak	48073	29	MI		2	4	8	9	2	3	1
Oakland	Royal Oak	48067	30	MI	2	2	1	2	13	7	3	
Oakland	South Lyon	48178	2	MI					1		1	
Oakland	Southfield	48076	16	MI	2	2	2	2	1	2	3	2
Oakland	Southfield	48075	3	MI			1	1				1
Oakland	Southfield	48034	5	MI			1		1	1	1	1

Table 7B cont'd

Iosco	National City	48748	2	MI		1	1					
Jackson	Michigan Center	49254	1	MI						1		
Lapeer	Metamora	48455	2	MI	1			1				
Lapeer	Silverwood	48760	1	MI	1							
Lenawee	Tecumseh	49286	1	MI					1			
Livingston	Brighton	48116	2	MI				1				1
Macomb	Clinton Township	48035	1	MI			1					
Macomb	Clinton Township	48038	1	MI						1		
Macomb	East Pointe	48021	3	MI			1			2		
Macomb	New Baltimore	48047	1	MI								1
Macomb	New Haven	48048	1	MI	1							
Macomb	Roseville	48066	4	MI	2			1			1	
Macomb	Shelby Township	48316	1	MI								1
Macomb	St. Clair Shores	48080	1	MI	1							
Macomb	St. Clair Shores	48081	3	MI			1			1	1	
Macomb	St. Clair Shores	48082	2	MI	1					1		
Macomb	Sterling Heights	48310	3	MI			2				1	
Macomb	Sterling Heights	48312	4	MI			1	1	1		1	
Macomb	Sterling Heights	48313	2	MI	1		1					
Macomb	Sterling Heights	48314	2	MI	1						1	
Macomb	Utica	48317	2	MI		1	1					
Macomb	Warren	48091	3	MI	1		1				1	
Macomb	Warren	48089	4	MI							4	
Macomb	Warren	48092	4	MI		1	1				2	
Macomb	Warren	48093	8	MI		2			1		5	
Mecosta	Stanwood	49346	1	MI	1							
Oakland	**Auburn Hills**	**48326**	**3**	MI	**1**		**1**	**1**				
Oakland	**B'hm Fms,Frk,Bv H**	**48025**	**10**	MI	**1**	**4**	**1**	**1**			**2**	**1**
Oakland	**Berkley**	**48072**	**22**	MI	**1**	**1**	**2**	**6**	**6**	**2**	**3**	**1**
Oakland	**Birmingham**	**48010**	**2**	MI							**2**	
Oakland	**Birmingham**	**48009**	**22**	MI	**9**	**7**	**1**	**1**	**3**		**1**	
Oakland	**Bloomfield**	**48302**	**10**	MI	**1**	**3**	**2**		**2**	**2**		
Oakland	**Bloomfield**	**48301**	**9**	MI	**2**	**5**	**1**				**1**	
Oakland	**Bloomfield Hills**	**48304**	**10**	MI	**2**	**2**	**4**	**1**		**1**		

TABLE 7B

Licenise Plate Survey
Residency by City, County, & Zip Code
Detailed by Numerical Distribution and Mile Segment

County	City	Zip Code	Count of Zip Code	State	16-15	15-14	14-13	13-12	12-11	11-10	10-9	9-8
	(no listing)	48288	5	MI	1	2	1	1				
	(no listing)	48018	1	MI				1				
	(no listing)	48013	3	MI	1	1				1		
	Andover	44003	1	OH			1					
	Cherry Hill	8034	1	NJ							1	
	Chicago	60666	1	IL								1
	Cincinnati	45242	1	OH				1				
	Cleveland	44124	1	OH			1					
	Des Plaines	60016	3	IL		1	2					
	Downer's Grove	60515	1	IL	1							
	Hilliard	43026	2	OH		2						
	Mount Laurel	8054	1	NJ								1
	Pope Air Force Base	28308	1	NC							1	
	San Francisco	94403	1	CA							1	
	Torrance	90502	1	CA			1					
	Versailles	45380	1	OH							1	
Alpena	Hubbard Lake	49747	1	MI					1			
Barry	Delton	49046	1	MI				1				
Berrien	Baroda	49101	1	MI	1							
Calhoun	Battle Creek	49015	1	MI	1							
Cheboygan	Cheboygan	49721	1	MI							1	
Cheboygan	Indian River	49749	1	MI							1	
Chippewa	Eckerman	49728	1	MI								1
Emmett	Alanson	49706	1	MI					1			
Genesee	Attica	48412	1	MI						1		
Genesee	Flint	48504	1	MI		1						
Genesee	Flushing	48433	1	MI					1			
Gladwin	Beaverton	48612	1	MI							1	
Iosco	East Tawas	48730	1	MI								1

TABLE 7-C
LICENSE PLATE SURVEY
Residency by City, County & Zip Code
Detailed by Percent Distribution & Mile Segment

PARTICIPATING CITIES

CITY	ZIP	CT.	16-15	15-14	14-13	13-12	12-11	11-10	10-9	9-8
Berkley	48072	22	5%	5%	10%	27%	27%	10%	14%	5%
Birmingham	48010	2	-	-	-	-	-	-	100%	-
Birmingham	48009	22	41%	32%	5%	5%	14%	-	5%	-
Ferndale	48220	50	-	-	2%	4%	10%	10%	40%	34%
H'ton Woods	48070	14	14%	-	7%	7%	29%	36%	7%	-
Pleasant Rdg.	48069	13	15%	-	-	-	23%	8%	53%	-
Royal Oak	48067	30	7%	7%	3%	7%	43%	23%	10%	-
Royal Oak	48073	29	-	7%	14%	28%	31%	7%	9%	3%

OTHER OAKLAND COUNTY

CITY	ZIP	CT.	16-15	15-14	14-13	13-12	12-11	11-10	10-9	9-8
Auburn Hills	48326	3	33%	-	33%	33%	-	-	-	-
B. Fms, Frk., Bev. Hills.	48025	10	10%	40%	10%	10%	-	-	20%	10%
Bloomfield	48301	9	22%	55%	11%	-	-	-	11%	-
Bloomfield	48302	10	10%	30%	20%	-	20%	20%	-	-
Blmfld. Hills	48304	10	20%	20%	40%	10%	-	10%	-	-
Blmfld. Hills	48303	1	-	-	-	-	-	-	100%	-
Clarkston	48346	5	20%	-	40%	20%	-	-	20%	-
Clarkston	48348	2	-	100%	-	-	-	-	-	-
Clawson	48017	8	-	-	50%	25%	25%	-	-	-
Comm. Twp.	48382	3	-	-	-	33%	33%	-	33%	-
Farmington	48335	1	-	-	-	-	100%	-	-	-
Farmington	48336	2	-	-	50%	-	50%	-	-	-
Frm'ton Hills	48331	2	-	-	-	-	-	-	-	100%
Frm'ton Hills	48334	7	29%	-	-	-	57%	-	14%	-
Hazel Park	48030	16	-	6%	-	25%	19%	13%	25%	13%
Holly	48442	1	-	-	100%	-	-	-	-	-
Md'son Hgts	48071	8	-	-	13%	-	-	13%	50%	25%
Milford	48380	1	-	100%	-	-	-	-	-	-
Milford	48381	2	-	-	-	50%	-	-	50%	-
New Hudson	48165	1	-	-	100%	-	-	-	-	-
Novi	48375	1	-	-	-	-	-	-	100%	-
Novi	48377	1	-	100%	-	-	-	-	-	-
Oak Park	48237	21	5%	5%	10%	5%	19%	5%	24%	29%
Ortonville	48462	1	100%	-	-	-	-	-	-	-
Oxford	48371	1	100%	-	-	-	-	-	-	-

OTHER OAKLAND COUNTY cont'd

CITY	ZIP	CT.	16-15	15-14	14-13	13-12	12-11	11-10	10-9	9-8
Pontiac	48341	2	-	50%	-	-	50%	-	-	-
Rochester	48306	3	33%	-	-	-	-	33%	33%	-
Rochester	48307	4	-	-	75%	-	-	-	25%	-
Roch. Hills	48309	2	-	-	-	-	50%	-	50%	-
South Lyon	48178	2	-	-	-	-	50%	-	50%	-
Southfield	48034	5	-	-	20%	-	20%	20%	20%	20%
Southfield	48075	3	-	-	33%	33%	-	-	-	33%
Southfield	48076	16	13%	13%	13%	13%	6%	13%	19%	13%
Troy	48083	8	13%	13%	13%	-	50%	13%	-	-
Troy	48084	22	18%	14%	14%	5%	14%	9%	18%	14%
Troy	48098	7	-	29%	29%	-	-	29%	-	14%
Troy	48099	1	100%	-	-	-	-	-	-	-
Walled Lake	48390	2	-	-	50%	-	-	-	-	50%
Waterford	48327	1	100%	-	-	-	-	-	-	-
Waterford	48329	2	-	-	-	-	-	-	50%	50%
West Blmfld.	48322	8	13%	25%	13%	25%	13%	-	-	13%
West Blmfld.	48323	5	20%	20%	20%	20%	-	-	-	20%
West Blmfld.	48324	2	-	-	-	50%	-	-	-	50%
White Lake	48383	2	-	-	-	100%	-	-	-	-
White Lake	48386	2	-	-	100%	-	-	-	-	-
Wixom	48393	1	-	-	-	100%	-	-	-	-

WAYNE COUNTY

CITY	ZIP	CT.	16-15	15-14	14-13	13-12	12-11	11-10	10-9	9-8
Allen Park	48101	1	-	-	-	-	100%	-	-	-
Belleville	48111	1	-	-	-	-	100%	-	-	-
Canton	48187	1	-	-	-	-	-	100%	-	-
Dearborn	48120	1	-	-	100%	-	-	-	-	-
Dearborn	48121	11	18%	18%	9%	-	27%	-	18%	9%
Dearborn	48124	1	-	-	100%	-	-	-	-	-
Dearborn	48126	4	-	-	-	25%	-	25%	50%	-
Dearborn	48128	1	100%	-	-	-	-	-	-	-
Drbn. Hgts.	48127	2	-	-	-	50%	-	-	50%	-
Detroit	48201	1	-	-	-	-	-	100%	-	-
Detroit	48202	2	-	-	-	-	50%	-	50%	-
Detroit	48204	2	-	-	-	-	50%	-	50%	-
Detroit	48205	3	-	-	-	33%	-	33%	33%	-
Detroit	48206	3	-	-	-	-	-	-	100%	-
Detroit	48207	2	-	-	-	-	50%	-	50%	-
Detroit	48210	1	-	-	-	-	-	100%	-	-
Detroit	48211	2	-	-	-	-	-	-	50%	50%

WAYNE COUNTY cont'd

CITY	ZIP	CT.	16-15	15-14	14-13	13-12	12-11	11-10	10-9	9-8
Detroit	48214	2	-	50%	-	-	50%	-	-	-
Detroit	48213	1	-	-	-	-	100%	-	-	-
Detroit	48219	2	-	-	-	-	-	50%	50%	-
Detroit	48221	12	8%	8%	-	8%	-	-	67%	8%
Detroit	48223	2	-	-	-	-	100%	-	-	-
Detroit	48224	1	-	-	-	-	-	100%	-	-
Detroit	48227	4	-	25%	25%	25%	-	25%	-	-
Detroit	48228	3	-	-	-	33%	-	-	67%	-
Detroit	48232	1	-	-	-	100%	-	-	-	-
Detroit	48234	3	-	-	-	-	33%	-	67%	-
Detroit	48235	6	-	-	-	-	-	-	-	100%
Detroit	48238	3	-	-	-	-	-	-	67%	33%
Detroit	48239	2	-	-	-	-	50%	50%	-	-
Detroit	48240	3	-	33%	-	-	-	33%	33%	-
Garden City	48135	1	-	100%	-	-	-	-	-	-
Grosse Pte.	48235	2	-	-	-	-	-	-	-	100%
Grosse Pte.	48236	2	50%	50%	-	-	-	-	-	-
Hamtramck	48212	2	-	-	50%	-	50%	-	-	-
Highland Pk.	48203	11	-	9%	-	-	9%	9%	27%	45%
Livonia	48150	4	25%	25%	-	-	-	-	50%	-
Livonia	48152	5	40%	-	20%	-	-	20%	20%	-
Livonia	48153	1	-	-	-	-	-	100%	-	-
Livonia	48154	4	-	-	-	25%	50%	-	25%	-
Northville	48167	3	33%	33%	-	33%	-	-	-	-
Plymouth	48170	1	-	-	-	-	100%	-	-	-
Taylor 48180	1	-	100%	-	-	-	-	-	-	
Trenton	48183	1	-	100%	-	-	-	-	-	-
Westland	48185	3	-	-	-	-	-	-	100%	-
Wyandotte/ Riverview	48192	1	-	-	-	-	-	-	-	100%

MACOMB COUNTY

CITY	ZIP	CT.	16-15	15-14	14-13	13-12	12-11	11-10	10-9	9-8
Clinton Twp.	48035	1	-	-	100%	-	-	-	-	-
Clinton Twp.	48038	1	-	-	-	-	-	100%	-	-
East Pointe	48021	3	-	-	33%	-	-	67%	-	-
New Haven	48048	1	100%	-	-	-	-	-	-	-
Roseville	48066	4	50%	-	-	25%	-	-	25%	-
Shelby Twp.	48316	1	-	-	-	-	-	-	-	100%

MACOMB COUNTY cont'd

CITY	ZIP	CT.	16-15	15-14	14-13	13-12	12-11	11-10	10-9	9-8
St. Clair Shs.	48082	2	50%	-	-	-	-	50%	-	-
St. Clair Sh.	48080	1	100%	-	-	-	-	-	-	-
St. Clair Sh.	48081	3	-	-	33%	-	-	33%	33%	-
Sterling Hgts.	48310	3	-	-	67%	-	-	-	33%	-
Sterling Hgts.	48312	4	-	-	25%	25%	25%	-	25%	-
Sterling Hgts.	48313	2	50%	-	50%	-	-	-	-	-
Sterling Hgts.	48314	2	50%	-	-	-	-	-	50%	-
Utica	48317	2	-	50%	50%	-	-	-	-	-
Warren	48091	3	33%	-	33%	-	-	-	33%	-
Warren	48092	4	-	25%	25%	-	-	-	50%	-
Warren	48093	8	-	25%	-	-	13%	-	62%	-
Warren	48089	4	-	-	-	-	-	-	100%	-

ALL OTHER COUNTIES

COUNTY/ CITY	ZIP	CT.	16-15	15-14	14-13	13-12	12-11	11-10	10-9	9-8
ALPENA:										
Hubbard Lk.	49747	1	-	-	-	-	100%	-	-	-
BARRY:										
Delton	49046	1	-	-	-	100%	-	-	-	-
BERRIEN:										
Baroda	49101	1	100%	-	-	-	-	-	-	-
CALHOUN:										
Battle Creek	49015	1	100%	-	-	-	-	-	-	-
CHEBOYGAN:										
Cheboygan	49721	1	-	-	-	-	-	-	100%	-
Indian River	49749	1		-	-	-	-	-	-	100%
CHIPPEWA:										
Eckerman	49728	1	-	-	-	-	-	-	-	100%
EMMETT:										
Alanson	49706	1	-	-	-	-	100%	-	-	-
GENESEE:										
Attica	48412	1	-	-	-	-	-	100%	-	-
Flint	48504	1	-	100%	-	-	-	-	-	-
Flushing	48433	1	-	-	-	-	100%	-	-	-
GLADWIN:										
Beaverton	48612	1	-	-	-	-	-	-	100%	-
IOSCO:										
East Tawas	48730	1	-	-	-	-	-	-	-	100%
National City	48748	2	-	50%	50%	-	-	-	-	-
JACKSON:										
Mich. Center	49254	1	-	-	-	-	-	100%	-	-

ALL OTHER COUNTIES cont'd

COUNTY/ CITY	ZIP	CT.	16-15	15-14	14-13	13-12	12-11	11-10	10-9	9-8
LAPEER:										
Metamora	48455	2	50%	-	-	50%	-	-	-	-
Silverwood	48760	1	100%	-	-	-	-	-	-	-
LENAWEE:										
Tecumseh	49286	1	-	-	-	-	100%	-	-	-
LIVINGSTON:										
Brighton	48116	2	-	-	-	50%	-	-	-	50%
MECOSTA:										
Stanwood	49346	1	100%	-	-	-	-	-	-	-
OGEMAW:										
West Branch	48661	1	100%	-	-	-	-	-	-	-
OTSEGO:										
Elmira	49730	1	-	-	-	-	100%	-	-	-
SHIAWASSEE:										
Owosso	48867	1	-	-	-	100%	-	-	-	-
ST. CLAIR:										
Algonac	48001	1	100%	-	-	-	-	-	-	-
Almont	48003	1	-	-	-	-	100%	-	-	-
Fair Haven	48023	1	-	-	-	-	-	-	100%	-
Marine City	48039	2	-	-	-	-	50%	50%	-	-
New Baltim.	48047	1	-	-	-	-	-	-	-	100%
Yale	48097	1	-	-	-	-	-	-	100%	-
TUSCOLA:										
Vassar	48768	1	-	-	100%	-	-	-	-	-
WASHTENAW:										
Ann Arbor	48105	1	-	-	-	-	-	-	100%	-
Ypsilanti	48197	1	-	-	-	-	-	-	-	100%