Transit-Oriented Development Portfolio

City of South Milwaukee Appendix
STAKEHOLDER INTERVIEWS
City of South Milwaukee: Stakeholder Interview’s Summary

Below is a summary of comments received during Stakeholder Interviews conducted in the City of South Milwaukee on February 28, 2006. A listing of interviewees is included at the end of summary.

What are the areas assets and advantages?

- Two large employers in town: Bucyrus and Kyle Cooper; Bucyrus makes mining equipment; Kyle Cooper makes electrical transformers. Bucyrus has 950 employees at South Milwaukee plant; three shifts; employees come from South Milwaukee, Franklin, Oak Creek, and Cudahy
- Bucyrus Corporation working on a $30 million expansion north of the suggested station area
- Bucyrus currently leases the front end (office part) of their building; will relocate office space to new expansion site
- Metal Cut Corporation has recently expanded
- More banks in town
- Excellent schools; new high school which provides cultural opportunities for community and has brought in new families
- Income levels are rising
- In recent years, property values have appreciated 5-8%
- New younger residents in new condominiums
- Recreational uses including South Milwaukee Yacht Club
- The Lakefront
- Grant Park-county park with public boat launch facilities; baseball fields, golf course
- Oak Creek Parkway
- Local theater in town
- Self contained city with city owned sewer and water utilities
Historic train depot-on National Register (1978)
Stable area; no mortgage defaults
The City easy to work with
Property taxes are lower as compared to surrounding communities
Housing prices are lower as compared to surrounding communities
Safe community
15 minutes from downtown Milwaukee
Newer, post war development on the west side of the UP Railroad

What are the areas weaknesses and challenges?

- South Milwaukee is a bedroom community
- Average income around $35,000
- Aging residents
- East side of the tracks, older, tired neighborhood—need for redevelopment
- Former train station owned by private company-Benkowski Builders
- Need to fill vacancies in downtown
- Recommendations in Comprehensive Plan have not been implemented
- South Milwaukee needs to establish itself as a “destination”
- It is harder to attract higher end housing without attractions in Downtown
- Residents would not support higher end/trendy retail or restaurants; very frugal
- New retail and development is occurring in Franklin and Oak Creek
- Need to leave town to shop
- No one really spearheading redevelopment in the downtown
- The downtown not a destination
- City fairly conservative in looking at redevelopment opportunities
- The City is largely developed; no large developments will happen

How has the area changed over time?

- There is some turnover with new families moving into town
- New residents work in Milwaukee and other suburbs
What businesses exist or are needed in the area?

- Some successful businesses along Milwaukee Avenue, the primary downtown street
- South Milwaukee's downtown has suffered from newer shopping malls in other areas, including South Ridge Mall, 76th/Ramsey in Greendale; and the Oak Creek area
- There is a need to stimulate development in the downtown. There presently is no good retail
- On Milwaukee Avenue, between 8th and 11th Streets, and 12th–13th, area is mostly retail oriented with food, jewelry, martial arts stores; between 13th–14th, blocks are more neighborhood oriented
- The City should tear down the downtown and start over

What type(s) of housing are needed?

- A need infill housing
- A need for higher end multi family residential
- A need for higher end buy up single family

Are there any physical or urban design issues or opportunities?

- The façade grant program for downtown businesses provide matching funds—not many businesses have taken advantage of it
- The City has implemented a streetscape program on Marquette Street with planters, trees, benches, waste containers
- City staff has tried to implement recommended design guidelines from the Comprehensive Plan into the zoning code but revised code not yet adopted there is a lot of resistance for new regulations
Are there any aspects of the community that make it difficult to attract new investment?

- Serious zoning problems
- Nonprofit buildings along Milwaukee Avenue
- Too many parking lots in the downtown owned by the Bucyrus Company
- The City has policy against building on 30 foot lots; a real problem for infill housing/development

Please identify any planned or recommended improvements in the area within the next 10 years.

- Northeast of Bucyrus is a five acre vacant site by the creek; previously owned by Bucyrus; planned residential but environmental issues
- Three TIF districts are in place and a 4th is pending and would support the proposed Bucyrus Company expansion.
- Infill development appropriate for “lifestyle lodging” i.e. condominiums for either new buyers or empty nesters
- In the southeast side, Inland Development Partners constructing a condominium project north of the Cooper Kyle plant—side by side townhouses
- Madison Street is within the TIF district; old housing in this area, The City would like to purchase the site and put upgraded housing near the proposed train station
- Within TIF districts, the City initiates RFPs for development proposals, provides infrastructure, remediation, and demolition
- To the north of the downtown, the City has bought some property around College Avenue and would like to create a TIF district to redevelop area
- On Madison, between 10th and 11th, appropriate for new condo and townhouse development
- Former Line building in downtown—proposed mixed use; significant piece of property in the downtown; located between Milwaukee and Marquette Streets at
the tracks; would need remediation; one tenant in building (fitness equipment representative).

- The Masonic Lodge building being redeveloped as condominiums
- Vacant land to the northeast of the downtown is proposed for eight higher end single family homes
- Bucyrus needs more parking; planning on using their property on Chicago Avenue which currently houses steel structures for new parking
- The City could support additional condominium development in the $200,000 range
- New single family development at Drexel Avenue and 18th Avenue-14 lot subdivision; backs up to a natural area; houses in the $200,000-$350,000 range
- Some feel that new development would occur along Milwaukee Avenue if there were a commuter station
- Area along College Avenue is a TIF district; potential for a mixed use development
- The former community center will be converted to a banquet facility and a bowling alley
- The north of Chicago Street at 10th on northeast side of Rawson, the City wants to buy and convert a site to residential/mixed use; environmental remediation issues
- The parcel on the southeast side owned by Inland and within the TIF proposed by 32 unit condominium buildings; City gave financial incentives including remediation help and infrastructure improvements
- The building behind Marquette Manor owned by City; may turn it into residential lofts

Do you have any other general comments or observations?

- A Community Development Authority has been in place for 6 years
- South Milwaukee is a blue collar town; residents work at Coopers, Bucyrus, Appleton Electric, Delphi in Oak Creek
Bucyrus is working with the county to provide employees with low interest homeowner loads

Bucyrus does not use freight trains for any delivery

A freeway exit ramp is proposed on Drexel Avenue off of I-94

A new Northwest Mutual Insurance Company campus proposed for 27th and Drexel in Franklin

**City of South Milwaukee Interviewees**

1. John Lange, CDA, business owner
2. Jay Benkowski, Investment Property Owner, Historical Preservation Commission
3. Frank Bruno, Bucyrus International
4. Mike Koenen, Tri City National Bank
5. Gerald Klamrowski, developer
6. Karla Harris, Community Center Director, Police and Fire Commission
7. Jac Zader, City of Milwaukee Director of Planning and Inspections
8. Brett Briesemeister; Appraiser/Realtor, Plan Commission
KRM Alternatives Analysis
EIS and Project Development Phase

TRANSIT ORIENTED DEVELOPMENT

Community Area Workshops
South Milwaukee: Issues and Opportunities Workshop
South Milwaukee City Administration Building
2424 15th Avenue

Monday, March 20th, 2006
5:30 – 7:30 pm

Workshop Summary
(19 completed questionnaires received)
Note: Numbers in parentheses indicate multiple responses for a particular response.

1) List the five most important problems/ issues confronting the station area:

General
• Funding (6), state and federal funding
• Adjacent property owners concerns, residential concerns (5)
• Educating and communicating the project to taxpayers (2)
• Resistance to change (2)
• Attractions for outsiders (2)
• Key city leaders not behind project
• Limited household income
• Older population
• Getting local businesses to offer incentives to employees to take transit
• Vehicle owners prefer the independence

Station/ Service
• Number of trains
• Noise (4), start and end times of trains
• Second set of tracks
KRM Alternatives Analysis
EIS and Project Development Phase

TRANSIT ORIENTED DEVELOPMENT
Community Area Workshops

- Ridership (2), usefulness of system

Land Use / Development
- Station location (2) – its ability to attract future economic development
- Parking (14), need parking structure instead of a large parking lot
- Presence of existing structures, existing factory building west of track (5)
- Utilize existing old buildings to keep costs down and utilize vacant land for other development (2)
- Lack of available undeveloped property (3)
- Land assembly given natural and man-made constraints
- Do not own historic train station anymore
- Lack of housing density (2)
- Run-down housing stock, lack good design (2)
- No areas for food concessions
- Attract businesses (2), revitalize Milwaukee Avenue
- Lack of pedestrian traffic in the CBD (2)
- Proximity to CBD to help business traffic
- Good design

Transportation
- Traffic management, traffic delays (5)
- Access – current buildings block access (3)
- Intermodal access - need increased transit service to the station – bus, cab service, bike trails (3)
- Bicycle and pedestrian safety (3)
- Lack of east-west connection
- Minimal north-south access
- Railroad crossing on Milwaukee Avenue
2) Three most important issues mentioned thus far

The issues are ranked in order of importance, the most important issue being number one.

1. Educating taxpayers regarding costs, support for station, community involvement (11)
2. Fit with larger picture of area transportation, plans for downtown revitalization (6)
3. Financial cost to South Milwaukee (5)

Other Responses
- Traffic (4)
- Existing factory buildings to the west (3)
- Multimodal access (2)
- Parking (2)
- Leverage development potential from station location (2)
- Usefulness
- Cost effective/self sustaining
- Economic development
- Good design of station
- Ridership
- Noise, start and end times
- Safety
- Attractions within S. Milwaukee for visitors
- Density
- Opportunity for neighborhood redevelopment
- Land Development
- Business uses
- East west access street system
- Infrastructure
3) List three projects/improvements would like to see made in the station area

**General**
- Surveillance
- Outside funding for building station

**Land Use/Development**
- Improved “first impression of community”, consistent signage, landscaping, building facades (7)
- Make the downtown a focal point (3)
- Clean up and reduce blight (4), west of track
- Pedestrian improvements (3)
- Bigger station, façade improvement (2)
- Development of underutilized properties (2)
- Increased housing density (2)
- Commercial development, restaurants (7), Milwaukee Avenue revitalization
- Mixed use development (2)
- Green space
- Safe and ample parking (4)
- Structured parking (2)
- Shared parking between Bucyrus (major employer) and Metra

**Transportation**
- Improve multimodal access – bike/ped access, trail, taxi service, other feeder services (4)
- Traffic flow, improve intersections (2)
- Foot traffic
- Snow removal from sidewalks and curbs
- Better drop-off, pick-up area
Drexel Boulevard crossing of railroad tracks
Improved east-west traffic

4) List the primary Assets and Advantages of the Station Area

Station/ Service
- Existing ridership base
- Senior citizens who would take the train rather than drive

Land Use/ Development
- A classic crossroads downtown area (3) (downtown needs to be developed)
- Started as a railroad community; station would regenerate the community (3)
- “Small town feel” in the greater Milwaukee area
- Grant Park/ Lake Michigan (7), bike trail
- Residential and commercial density, major employer (4)
- Proximity to two main business districts (2) – Milwaukee Avenue and Pick and Save shopping center
- Improvable and affordable housing stock
- Underutilized property available for redevelopment (3), industrial building that can be converted into a garage
- Historic train station
- Redevelopment proposal on Madison Avenue
- Future of Marquette square – 10th Avenue and Marquette Avenue corner
- On the wetland – disadvantage

Transportation
- Good east-west and north-south access
- Bus lines
- Tie in with the bike trail
Other

Need to take a look at locating the station near Drexel Avenue behind the Grant Park Plaza
South Milwaukee: Preliminary Station Area Plans
City Administration Building
2424 15th Avenue

Wednesday, August 2, 2006
5:30 – 7:30 pm

Workshop Summary
(3 group comment sheets received)
After a project presentation, the audience was asked to form small groups to discuss and make comments on the preliminary station area plans for future land use, access and circulation, and urban design. The following summarizes all group comments, which will be used to refine the preliminary station area plans.

Preliminary Future Land Use
• Put retail and restaurants along Milwaukee Avenue
• Proposed station should be as close to Milwaukee Avenue as possible for visibility
• Allow for public area to accommodate a Farmers Market and other festivals
• Include multi-family residential in the downtown
• Retain major industrial uses in the downtown
• Higher densities and mixed use is appropriate along Milwaukee Avenue

Preliminary Future Access and Circulation Pattern
• Pedestrian crossings should be safe and inviting
• New bike and pedestrian paths should connect to existing paths
• There should be pedestrian connections to commercial centers
• New bicycle and pedestrian connections are needed on the west side of tracks and from south of the downtown
• A pedestrian connection to the Oak Creek Parkway is needed from 8th Street
• Reconsider parking needs and parking locations for major employers
• Provide secure bike storage facilities at station; allow bicycles on trains
• Additional bus routes should be considered

Preliminary Future Urban Design Framework
• Streetscape along Milwaukee Avenue should be appropriate for both pedestrians and vehicular traffic
• Better sidewalks and lighting is needed along Marquette Avenue and other local streets
• New design elements should reflect a “quant village” theme
• A major gateway on the east side of the downtown should be located at the start of the proposed commercial land uses
• Specialized streetscape should focus on the actual station area
• Increased streetscape should be applied along Rawson Avenue, across the tracks
TRANSIT ORIENTED DEVELOPMENT

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I. EXECUTIVE SUMMARY

Station Area Land Uses and Business Activity

- The station area is characterized by high population density, a moderately high share of the population aged 65 and older and a median age of 36.1 years. Almost 60% of the housing units are owner-occupied, 45% of the population aged 25 and older has at least some college, and the median household income is $40,000, indicative of a middle income area. Within the half-mile station area are over 4,500 residents and 2,900 employees.

- The immediate station area is within a TIF district. Immediately adjacent to the proposed station are industrial uses (Bucyrus Erie plant), and an older suburban downtown with a bank, stores, small offices and some second story residences.

- The City of South Milwaukee has been active in buying vacant or underutilized land, remediating it where necessary, and selling it to developers or companies as a way of increasing the number of jobs and residents in the area.

Demographic and Economic Trends and Projections

- As of 2000, the City of South Milwaukee had a population of 21,256 in 8,694 households. The 2005 estimate of population by the State Department of Administration indicates a modest increase in population and households over the past five years.

- Projections to 2025 by the State Department of Administration show a 19.2% increase in population and 25.8% increase in the number of households between 2000 and 2025. This equals 2,246 new households for the community.

- The South Milwaukee zip code had 283 employers in 2003 with 4,368 employees. The largest single employer is Bucyrus Erie, located downtown in the station area, with 950 blue collar and white collar employees. Bucyrus Erie has plans to expand its facilities in South Milwaukee and increase employment by 150-200 over time.
South Milwaukee’s employment base is primarily in manufacturing, construction, health care and social assistance, with a limited number of firms in the professional, financial and business services categories that generate the demand for new office space.

Residential Development Potential

- The City issued 236 residential building permits between 2000 and 2005 for an annual average of 39 units. Of these, 142 units were for multi-family construction with one sizable project completed in 2001 and very little constructed in recent years.

- The median price for condominiums and townhouses sold in South Milwaukee through Realtors and reported in the Multiple Listing Service in 2005 was $154,450, ranging from $94,000 to $179,900.

- One new townhouse and ranch-style condominium project at the south end of the station area is marketing units from $169,900 for the townhouses to $184,900 for the ranch units.

- Rail service offers the potential for capturing a higher share of future housing construction within the half-mile station area. While construction in the station area has been limited to date, the momentum exists for increased residential development.

- Valerie S. Kretchmer Associates, Inc. (VSKA) estimates that there will be demand for 1,995 new housing units in the City of South Milwaukee (133 per year on average) between 2005 and 2020. A total of 367 (24 per year on average) could be in the half-mile station area assuming commuter rail service. Without commuter rail, demand in the station area is estimated to be 299 units (20 per year on average.)

Retail Development Potential

- South Milwaukee is currently underserved with retail space based on 2002 Census of Retail Trade statistics for the city compared to other communities in Milwaukee County. City residents are spending a significant amount of their sales dollars outside of the city.
The City’s Comprehensive Plan envisions a more compact, but stronger retail area along Milwaukee Avenue, which means a potential decrease in the existing retail space at the fringes of downtown.

Bucyrus Erie occupies a significant portion of the area directly north of the proposed station location, therefore there is more limited retail development potential north of Milwaukee Avenue.

Small scale retail development opportunities exist along Milwaukee Avenue in a free-standing building, small shopping center or as part of a mixed-use building. The rail station, in combination with additional residents living in the downtown area, will provide additional demand for the existing, underutilized, and in many cases vacant space in the downtown area along Milwaukee Avenue.

Therefore VSKA estimates demand for 40,000-55,000 square feet of new retail space in the half-mile station area over the next 15 years.

Office Development Potential

There is limited demand for additional office space in the station area. A small amount of space could be absorbed in small free-standing single or multi-tenant office buildings, or as part of mixed-use buildings.

VSKA estimates that the half-mile station area could attract 25,000-40,000 square feet of new office space over the next 15 years, some of which could be part of mixed-use buildings.

These demand figures are exclusive of any office expansion that might be done by Bucyrus Erie, which controls so much of the land in the station area.
Summary of Demand

<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>Residential units</td>
<td>97</td>
<td>127</td>
<td>142</td>
<td>367</td>
</tr>
<tr>
<td>Retail (square feet)</td>
<td>10,000-15,000</td>
<td>15,000-20,000</td>
<td>15,000-20,000</td>
<td>40,000-55,000</td>
</tr>
<tr>
<td>Office (square feet)</td>
<td>5,000-10,000</td>
<td>10,000-15,000</td>
<td>10,000-15,000</td>
<td>25,000-40,000</td>
</tr>
</tbody>
</table>
II. METHODOLOGY

Residential Demand

To calculate demand for new housing units within the half-mile station area, Valerie S. Kretchmer Associates, Inc. (VSKA) started with the 2004 State of Wisconsin Department of Administration forecasts of population and households for the municipalities from 2005-2020. From this, VSKA estimated the share of new housing demand that would be within the half-mile station area without the commuter rail extension and then with the commuter rail extension. These calculations assume that expanded rail service is available around 2014. The projections assume that there will be an increase in development activity a few years prior to the opening of the rail line (2010) as people realize that the rail extension is a reality.

The demand forecast assumes a 5% residential vacancy factor, which is a conservative estimate. This is also added to the demand generated by the number of new households forecast in the community. Assumptions are also made regarding the need to replace older housing units. The annual rate of replacement is based on one-half of 1% of housing units built prior to 1970, as reported in the 2000 Census.

VSKA looked at the share of development recently completed, planned and under construction within the half-mile station area. VSKA then estimated the station area’s share of new development with and without the commuter rail extension given the availability of land and buildings here for new construction and rehabilitation.

It should be noted that the 2003 City of South Milwaukee Comprehensive Plan 2020 estimated a lower level of population and household growth than the State’s figures done in 2004. The projections used in that document were based on State projections from 1993 and thus are not as current as the figures used by VSKA for this analysis.
Retail Demand

VSKA assessed the availability of land in the station area, retail concentrations elsewhere in the community, and overall competitiveness of the station area for retail development. VSKA identified the type and scale of retail development that would be supportable at the station by assessing population density, area demographics, retail sales, level of competition and retail market conditions. The estimates of supportable retail space were based on the strength of this location and scale of retail development that the market can support. This assessment also incorporated recommendations in the City’s plans for the station area and for other competing areas in the community.

Office Demand

VSKA assessed the office potential at the station area by evaluating the existing office inventory in the community, vacancy and rental rates for office space in this area, office-prone employment trends, and the employment base in South Milwaukee. VSKA also assessed the availability of land in the station area and the scale and type of development that could be supported. This assessment also incorporated recommendations in the City’s plans for the station area and for other competing areas in the community.
III. STATION AREA LAND USES AND BUSINESS ACTIVITY

Proposed Station Location

The station is proposed to be located south of Milwaukee Avenue just west of 11th Street in the historic downtown core of South Milwaukee. As currently proposed, the station will be on the west side of the railroad tracks. The map on the following page shows the station location.

Half-Mile Study Area

The half-mile area surrounding the train station stretches from just north of Rawson Avenue on the north, to 6th Avenue on the east, Manistique on the south and 16th Avenue on the west. The map that follows shows the boundaries of the half-mile station area and the larger three mile radius from the station.

1. Study Area Land Use

The half-mile study area contains a mix of residential, industrial, civic, retail and commercial use. The station area includes the downtown retail core, in addition to the office and industrial facilities of Bucyrus Erie Corporation. The company is located on the east side of the railroad tracks between Milwaukee Avenue and Rawson Road. It also owns a significant parcel of land on the north side of Rawson Road that will be used for future expansion. At present Bucyrus has approximately 350,000 square feet of space here which includes 150,000 square feet under roof, with the remainder used for yards and storage. An expansion on the north side of Rawson Road is planned that will add new office as well as manufacturing space.

Bucyrus has been located in South Milwaukee since 1893 and employs 950 people and plans to increase employment by 150-200 people over time. Employment has been increasing since 2000 and the plant operates three shifts. Many of the employees live in South Milwaukee and are second and third generation employees of the company. However, employees do live all over the Milwaukee area and better transit will enable Bucyrus to attract qualified workers. Bucyrus manufactures equipment for the surface mining industry.
South Milwaukee .5 and 3 Mile Radii
Along Milwaukee Avenue east and west of the railroad tracks and along Chicago Avenue (Route 32) north of Milwaukee Avenue and 10th Avenue (south of Milwaukee Avenue) is the downtown retail and office core of the city. While not as vibrant as it once was, Milwaukee, Chicago and 10th Avenues are home to a variety of restaurants, small businesses, financial institutions and some offices. These include the Tri-City National Bank, florist, jewelry store, carpet store, bakery, day spa, shoe store, cleaners, mortgage company, hair salon, martial arts center, driving school, photographer, barber shop, medical offices, and formalwear shop. A non-profit community center that has a bowling alley and banquet facility is west of the railroad tracks downtown. The downtown also has some upper level apartments above stores.

The original train station, a National Register structure located at Madison and 11th Avenue one block south of Milwaukee Avenue, was renovated by a private developer and is being used for offices. Its parking lot is used by Bucyrus employees. The public library is located within the study area two blocks north of Milwaukee Avenue on Chicago Avenue. The post office is also within the study area on 10th Avenue (the southern extension of Chicago Avenue) and Michigan.

The Sunrise Plaza shopping center, located at the southern end of 10th Avenue directly east of the railroad tracks has banks, hardware store, pharmacy, and family restaurant. The South Milwaukee Fire Station and City garage are also here, as are the relatively new senior citizen apartment buildings, Marquette Manor with 48 units and Sunrise with 32 units. Marquette Plaza, a small shopping center located at the corner of Marquette and Route 32 at the edge of the downtown, has a tobacco shop, Laundromat, espresso stand, Subway and Dollar General store. North of this intersection are auto-related businesses.

Both east and west of the downtown core are well maintained, older single-family detached houses. At the far southern end of the study area along Route 32 is the Grant Plaza shopping center with a Pick ‘n Save grocery store, in addition to smaller commercial and retail buildings.

The area on the west side of the railroad tracks between Milwaukee and Marquette Avenues is industrial and commercial in use. The Line Material Building is a very large, old industrial building that has one tenant, but most of the space is currently vacant. It is viewed as a future redevelopment site.
2. Study Area Demographics

According to estimates provided by Demographics Now (a national demographic data vendor) and shown in Table 1, the half-mile area has an estimated 2005 population of 4,578, with a density of 5,829 persons per square mile. Population density in this area is high with a similar density to Cudahy, though lower than the densities in Kenosha and Racine. There are almost 2,900 employees within the half-mile area as well.

The median age of the population is 36.1 years, with almost 12% of the residents aged 65 and older. A high percentage of the households living near the train station do not have a motor vehicle (12.3%). Median household income is estimated to be $39,778. The owner occupancy rate is 57%. Slightly less than half of the residents aged 25 and older have at least some college education.

Table 1 that follows compares the characteristics of the station area with a larger area within three miles. The larger area has an estimated population of 45,260, and the overall density is considerably lower due in large part to the presence of General Mitchell Field west of the city. The population of the three mile area is older, better educated and considerably more affluent (its median household income is $50,337). Its homeownership rate is also much higher at 68%. A lower percent of its households have no access to a private vehicle.

Demographic maps in the Appendix show the median household income, population density and average household size by block group for the area surrounding the proposed South Milwaukee station. They show that the average household size is between 2 and 2.5 persons; population density is considerably higher in the neighborhoods east and west of the station than north and south with 7,500-10,000 people per square mile; and that median household incomes are higher closer to Lake Michigan.
## Table 1

### KEY DEMOGRAPHICS FOR 1/2 AND 3 MILE RADII

FROM THE PROPOSED SOUTH MILWAUKEE RAIL STATION

<table>
<thead>
<tr>
<th>2005</th>
<th>1/2 Mile</th>
<th>3 Mile</th>
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<tbody>
<tr>
<td>Population</td>
<td>4,578</td>
<td>45,260</td>
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<tr>
<td>Households</td>
<td>1,892</td>
<td>18,026</td>
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<tr>
<td>Population Density/Square Mile</td>
<td>5,829</td>
<td>1,601</td>
</tr>
<tr>
<td>Median Age</td>
<td>36.1</td>
<td>38.5</td>
</tr>
<tr>
<td>% of Population Aged 65+</td>
<td>11.9%</td>
<td>13.6%</td>
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<tr>
<td>Median Household Income</td>
<td>$39,778</td>
<td>$50,337</td>
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<tr>
<td>% of Households with No Vehicle Available</td>
<td>12.3%</td>
<td>8.1%</td>
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<tr>
<td>% of Population 25+ with at least some College</td>
<td>45.3%</td>
<td>51.3%</td>
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<tr>
<td>Total Housing Units</td>
<td>2,073</td>
<td>19,249</td>
</tr>
<tr>
<td>% Vacant Housing Units</td>
<td>8.8%</td>
<td>6.4%</td>
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<tr>
<td>% Owner-Occupied Housing Units</td>
<td>57.3%</td>
<td>67.7%</td>
</tr>
<tr>
<td>Employment</td>
<td>2,897</td>
<td>14,847</td>
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Source: Demographics Now.
Development Opportunity Sites

Within the half-mile radius of the station are several key development sites. The first is the site of the Line Material Building located directly west of the railroad tracks south of Milwaukee Avenue. The building is not in good condition and the City would like to see it torn down and redeveloped for residential, professional office or a mix of uses. It is viewed as the City’s prime transit-oriented development site. The Metalcut building along Madison between 10th and 11th Avenues east of the station location would also be appropriate for residential development. The City’s 2003 Comprehensive Plan recommends that viable industrial uses be retained and expanded, but that key underutilized or vacant sites be converted to higher and better uses.

A currently vacant site on the northeast corner of 10th Avenue and Marquette is planned for a new residential building. Outside of the downtown, but within the half-mile study area is a 5-acre parcel east of Chicago Avenue and south of the Oak Creek Parkway. The City is planning to acquire this parcel which is currently used for boat storage. After environmental remediation, the site could be developed for housing. Directly to the east of this site is land along the lake spur railroad tracks, including the Masonic Lodge with 2.5 acres of land that could also be redeveloped into housing.
IV. DEMOGRAPHIC TRENDS AND FORECASTS

South Milwaukee Population and Household Trends

According to the Wisconsin Department of Administration, South Milwaukee’s population increased slightly between 2000 and 2005, though it is projected to grow by 19.2% by 2025. The number of households is estimated to have grown by 5.2% between 2000 and 2005 and is projected to grow by 25.8% with over 2,200 new households in the city over the 25 year period. Table 2 below shows these trends.

Table 2

SOUTH MILWAUKEE HOUSEHOLD AND POPULATION PROJECTIONS
2000-2025

<table>
<thead>
<tr>
<th>Year</th>
<th>Households</th>
<th>Change #</th>
<th>% Change</th>
<th>Population</th>
<th>Change #</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>8,694</td>
<td></td>
<td></td>
<td>21,256</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2005</td>
<td>9,148</td>
<td>454</td>
<td>5.2%</td>
<td>21,313</td>
<td>57</td>
<td>0.3%</td>
</tr>
<tr>
<td>2010</td>
<td>9,607</td>
<td>459</td>
<td>5.0%</td>
<td>22,844</td>
<td>1,531</td>
<td>7.2%</td>
</tr>
<tr>
<td>2015</td>
<td>10,057</td>
<td>450</td>
<td>4.7%</td>
<td>23,764</td>
<td>920</td>
<td>4.0%</td>
</tr>
<tr>
<td>2020</td>
<td>10,577</td>
<td>520</td>
<td>5.2%</td>
<td>24,701</td>
<td>937</td>
<td>3.9%</td>
</tr>
<tr>
<td>2025</td>
<td>10,940</td>
<td>363</td>
<td>3.4%</td>
<td>25,336</td>
<td>635</td>
<td>2.6%</td>
</tr>
<tr>
<td>Change 2000-2025</td>
<td>2,246</td>
<td>25.8%</td>
<td></td>
<td>4,080</td>
<td>19.2%</td>
<td></td>
</tr>
</tbody>
</table>

Source: Wisconsin Department of Administration.
Employment Trends

In 2003, South Milwaukee’s zip code had 283 establishments with 4,368 employees. This represents an employment decrease of 5.7% though an increase of 13 establishments since 2001. Table 3 below provides a profile of establishments by industry for the South Milwaukee zip code from 2001 to 2003.

While the city’s employment base is heavily based in manufacturing, there are a significant number of firms in the construction, retail trade, health care and social assistance, accommodations and food services and other services sectors. The City’s largest employers are in manufacturing, health care and social assistance. The City has fewer companies in financial services, real estate and professional services, the sectors that are office users.

<table>
<thead>
<tr>
<th>Industry</th>
<th>Total Establishments by Year</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2003</td>
<td>2002</td>
</tr>
<tr>
<td>Total</td>
<td>283</td>
<td>278</td>
</tr>
<tr>
<td>Construction</td>
<td>27</td>
<td>29</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>22</td>
<td>23</td>
</tr>
<tr>
<td>Wholesale trade</td>
<td>10</td>
<td>11</td>
</tr>
<tr>
<td>Retail trade</td>
<td>36</td>
<td>35</td>
</tr>
<tr>
<td>Transportation &amp; warehousing</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Finance &amp; insurance</td>
<td>16</td>
<td>16</td>
</tr>
<tr>
<td>Real estate &amp; rental &amp; leasing</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>Professional, scientific &amp; technical services</td>
<td>18</td>
<td>22</td>
</tr>
<tr>
<td>Management of companies &amp; enterprises</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Admin, support, waste mgmt, remediation services</td>
<td>18</td>
<td>17</td>
</tr>
<tr>
<td>Educational services</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Health care and social assistance</td>
<td>32</td>
<td>28</td>
</tr>
<tr>
<td>Arts, entertainment &amp; recreation</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Accommodation &amp; food services</td>
<td>32</td>
<td>31</td>
</tr>
<tr>
<td>Other services (except public administration)</td>
<td>52</td>
<td>46</td>
</tr>
<tr>
<td>Unclassified establishments</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau
Population and Household Projections – Half-Mile Station Area

Table 4 on the following page presents population and household trends from 2000-2010 for the half-mile and three-mile areas around the South Milwaukee station, as estimated by Demographics Now, a national data vendor. The population of the half-mile area is projected to decline by 1.3% between 2005 and 2010, and the number of households by 2.0%. These projections show a slight increase in population (1.1%) and households (.1%) in the three mile area. These projections are more pessimistic than the State’s projections for the City of South Milwaukee which show a 7% increase in population and 5% increase in households during this time period. The three mile area encompasses parts of Cudahy and Oak Creek in addition to South Milwaukee.
## Table 4

### POPULATION AND HOUSEHOLD TRENDS
.5 AND 3 MILE RADII FROM SOUTH MILWAUKEE STATION

<table>
<thead>
<tr>
<th></th>
<th>Population</th>
<th>Households</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>0.5 mile radius</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2000</td>
<td>4,641</td>
<td>1,930</td>
</tr>
<tr>
<td>2005</td>
<td>4,578</td>
<td>1,892</td>
</tr>
<tr>
<td>Change 2000-2005</td>
<td>(63)</td>
<td>(38)</td>
</tr>
<tr>
<td>% change 2000-2005</td>
<td>-1.4%</td>
<td>-2.0%</td>
</tr>
<tr>
<td>2010</td>
<td>4,520</td>
<td>1,855</td>
</tr>
<tr>
<td>Change 2005-2010</td>
<td>(58)</td>
<td>(37)</td>
</tr>
<tr>
<td>% change 2005-2010</td>
<td>-1.3%</td>
<td>-2.0%</td>
</tr>
</tbody>
</table>

| **3 mile radius** |            |            |
| 2000   | 44,674     | 17,958     |
| 2005   | 45,260     | 18,026     |
| Change 2000-2005 | 586       | 68         |
| % change 2000-2005 | 1.3%     | 0.4%       |
| 2010   | 45,747     | 18,052     |
| Change 2005-2010 | 487       | 26         |
| % change 2005-2010 | 1.1%     | 0.1%       |

Source: Demographics Now
V. RESIDENTIAL MARKET CONDITIONS AND STATION AREA OPPORTUNITIES

Housing Market Trends

1. Building Permits and Construction Activity

South Milwaukee issued a total of 236 building permits for residential construction between 2000 and 2005, equal to an average of 39 units per year. During this period, 142 multi-family units were built, the largest number in 2001. A few small multi-family projects were built during this period in the half-mile study area; however most of the newer multi-family construction is on the north side of the city. The table below shows these trends.

Table 5

<table>
<thead>
<tr>
<th>Year</th>
<th>Single-Family Units</th>
<th>2-4 Units</th>
<th>Multi-Family Units</th>
<th>Total Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>27</td>
<td>0</td>
<td>16</td>
<td>43</td>
</tr>
<tr>
<td>2001</td>
<td>9</td>
<td>8</td>
<td>120</td>
<td>137</td>
</tr>
<tr>
<td>2002</td>
<td>2</td>
<td>6</td>
<td>0</td>
<td>8</td>
</tr>
<tr>
<td>2003</td>
<td>5</td>
<td>8</td>
<td>0</td>
<td>13</td>
</tr>
<tr>
<td>2004</td>
<td>5</td>
<td>10</td>
<td>0</td>
<td>15</td>
</tr>
<tr>
<td>2005</td>
<td>8</td>
<td>6</td>
<td>6</td>
<td>20</td>
</tr>
<tr>
<td>Total</td>
<td>56</td>
<td>38</td>
<td>142</td>
<td>236</td>
</tr>
<tr>
<td>Average Annual</td>
<td>9</td>
<td>6</td>
<td>24</td>
<td>39</td>
</tr>
</tbody>
</table>

Source: U.S. Census
2. Condominium and Townhouse Sales and Prices

According to data from Nicholson Realty, in 2005 there were a total of 20 condominium/townhouse sales through the Multiple Listing Service in South Milwaukee. The median sales price was $154,450, with a range of $94,000 to $179,900. The table below shows a summary of the 2005 condominium sales in South Milwaukee.

Table 6

<table>
<thead>
<tr>
<th>Location</th>
<th># of Units</th>
<th>Sold Price Range</th>
<th>Median Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>3333 5th Ave.</td>
<td>2</td>
<td>$94,000-$105,000</td>
<td>$99,500</td>
</tr>
<tr>
<td>3205 5th Ave.</td>
<td>1</td>
<td>$95,000</td>
<td>$95,000</td>
</tr>
<tr>
<td>1301 College Ave.</td>
<td>7</td>
<td>$129,500-$160,000</td>
<td>$152,000</td>
</tr>
<tr>
<td>221 Chicago Ave.</td>
<td>4</td>
<td>$139,900-$172,900</td>
<td>$156,400</td>
</tr>
<tr>
<td>229 Menomonee Ave.</td>
<td>1</td>
<td>$165,000</td>
<td>$165,000</td>
</tr>
<tr>
<td>1401A Milwaukee Ave.</td>
<td>1</td>
<td>$172,000</td>
<td>$172,000</td>
</tr>
<tr>
<td>1010-1016 Carrington Ave.</td>
<td>4</td>
<td>$179,900</td>
<td>$179,000</td>
</tr>
<tr>
<td>Total</td>
<td>20</td>
<td>$94,000-$179,900</td>
<td>$154,450</td>
</tr>
</tbody>
</table>

Source: Nicholson Realty.
Station Area Condominium and Townhouse Developments Actively Marketing and Planned

At this time there is one condominium project that is actively marketing units within the half-mile station area.

1. Heritage Reserve

Located at the south end of the station area on 9th Avenue, these 32 ranch-style and townhouse units have two bedrooms and two baths and range from 1,450-1,500 square feet. The property was a former industrial site. Prices range from $169,900 for the townhouses to $184,900 for the ranch units. Construction started in the spring of 2006 and a few units have been reserved. The development is targeted to empty nesters and seniors. The property is located in a residential neighborhood south of Sunrise Plaza shopping center and the City's garage.

2. Northeast Corner of Marquette and 10th Avenue

A three story mixed-use building with ground floor commercial space and two floors of condominiums is planned for this small site. The site, a former gas station owned by the City, was remediated and the owner is awaiting approval from the state Department of Natural Resources before starting construction. Marketing has not yet started for this project.

3. Masonic Lodge Site

The site of the Masonic Lodge at 7th Avenue and Monroe at the northeast quadrant of the study area is planned for 24 2-story walk-up units. The property has not yet started marketing or construction. As indicated earlier, several additional parcels of land to the west of this site, east of Route 32 and south of the Oak Creek Parkway are likely to be developed for residential use. A portion of this land is railroad right-of-way, while additional land is owned by the City.
New Condominiums Beyond the Station Area

There are several small infill developments outside of the station area. Six units are under construction on Drexel and Nicholson at the southwest corner of the City. The City’s Comprehensive Plan recommends residential development at the northeast corner of Rawson and Nicholson on the northwest side of the City. The City would also like to see the 28-acre former Everbrite Electric factory site along the lakefront between Drexel and Marion Avenues redeveloped with residential use. At this time, there are no specific plans for the site. However, its lakefront location makes this a very desirable residential site once it is remediated.

Residential Land Prices

The City of South Milwaukee has sold land to developers for residential or mixed-use development at prices that do not reflect true market value in order to jump start redevelopment. The Masonic Lodge property sold for approximately $4.59 per square foot or $25,000 per residential unit according to a real estate appraiser active in the area. Single-family infill lots on the west side of the City are selling for $90,000-$105,000 per lot for lots in the 12,000-14,000 square foot range ($7.50 per square foot). Several small lots (7,200 square feet) in or near downtown that could be developed with 4 to 5 residential units were priced at under $30,000 or $4 per square foot. However, there are few such lots available as the City is built out.
Condominium Sales and Development Sites

- 1301 College Avenue South
- 221 N Chicago
- 1010-1016 Carlington
- 1401A Milwaukee Avenue
- Masonic Lodge Site
- Heritage Reserve
- South Milwaukee
- Everbrite Electric site
- 3205-3333 5th Avenue South

Legend:
- Local Road
- Major Connector
- State Route
- Railroad
- Small Town
- Population Center
- City Park
- Water
- River/Canal

Scale 1:18,750 (at center)

2000 Feet

500 Meters
Rental Apartment Market

There are few newer apartment buildings in South Milwaukee that are not restricted to senior citizens. Small, older apartment buildings are located along Chicago Avenue within the station area and on the south end of the City off of 5th Avenue. The area south of College Avenue at the north end of the City has some relatively new apartment buildings and condominiums. There are very few apartments listed for rent in local newspapers. Advertised apartments ranged in rent from $500-555 for one and two bedroom units in older buildings. No new rental projects are planned at this time.

Newer rental properties in Cudahy are proximate to South Milwaukee and are representative of what better rentals can command. Buckhorn Station Apartments on Nicholson Avenue north of Layton, is approximately three miles north of the proposed station location. Developed in 1999, it has 64 units with rents ranging from $760 for a one bedroom apartment to $905 for the most expensive three bedroom unit. The development has many amenities including a pool and fitness center. The building is a Low-Income Housing Tax Credit project.

A second development by the same developer as Buckhorn Station, Gorman and Company, is Cudahy Commons, located on the west side of the city off of Pennsylvania Avenue, also within three miles of the proposed South Milwaukee station site. It is also a Low-Income Housing Tax Credit property, with rents ranging from $625 for a one bedroom to $800 for the largest two bedroom apartment.

The achievable rents are likely to be insufficient at this time to justify the higher costs of a mid-rise, market rate apartment building. In the future however, as the station area becomes more developed, a market rate apartment building could be financially feasible.
Opportunities for Residential Development in the Station Area

1. General Observations

The City of South Milwaukee has been actively buying up property, remediating it and selling it to developers. This has resulted in several smaller developments in the station area. The City’s Comprehensive Plan identifies the area on the west side of the railroad tracks south of Milwaukee Avenue as a prime transit-oriented development site that should include a combination of higher density residential, retail and possibly office uses. To encourage redevelopment, the Plan recommended increasing density to allow 10-25 units per acre proximate to the transit station and employment nodes. Density near, but not in, the downtown core should be a maximum of 20 units per acre. The station area is located in one of the City’s 3 TIF districts, and in the past the City has been aggressive in using funds from the districts to spur economic development.

Demand for condominiums and townhouses in the station area will come primarily from empty nesters, senior citizens and some younger people with connections to South Milwaukee who want to stay near their families. A high 13.6% of households within 3 miles of the station site are 65 years of age or older, indicating a strong base of potential buyers for a downtown condominium building. Single-family houses sell well at prices ranging from $92,000 to as much as $630,000 for homes on the Oak Creek Parkway. The 2005 median sales price for houses in South Milwaukee was $164,900. This means that new condominiums will need to be priced in the upper $100,000s to low $200,000s to be marketable in this area.

2. Future Demand

The City’s Comprehensive Plan show 760 new housing units and 1,750 additional residents citywide by 2020. These projections were issued before the State’s 2004 population projections and were based on State projections from 1993. The State’s updated projections show a much higher rate of population and household growth for South Milwaukee. The more recent projections form the baseline for VSKA’s demand analysis.

From 2005-2020, the projections indicate that there will be demand for 1,995 new housing units in South Milwaukee (133 per year on average). Valerie S. Kretchmer Associates, Inc. (VSKA) estimates that a total of 367 (24 per year on average) could be in the half-mile station area.
assuming improved commuter rail service. Without the commuter rail, demand in the station area is estimated to be 299 units (20 per year on average). Table 7 below provides details.

Table 7

SOUTH MILWAUKEE STATION AREA RESIDENTIAL DEMAND FROM 2005-2020
Number of Housing Units

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>City of South Milwaukee</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Demand due to household growth (1)</td>
<td>459</td>
<td>450</td>
<td>520</td>
<td>1,429</td>
<td>95</td>
</tr>
<tr>
<td>Plus 5% vacancy allowance</td>
<td>23</td>
<td>23</td>
<td>26</td>
<td>71</td>
<td>5</td>
</tr>
<tr>
<td>Replacement demand (2)</td>
<td>165</td>
<td>165</td>
<td>165</td>
<td>494</td>
<td>33</td>
</tr>
<tr>
<td><strong>Total City demand - baseline</strong></td>
<td>647</td>
<td>637</td>
<td>711</td>
<td>1,995</td>
<td>133</td>
</tr>
<tr>
<td>Demand Alternatives</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Half mile station area - baseline (3)</td>
<td>97</td>
<td>96</td>
<td>107</td>
<td>299</td>
<td>20</td>
</tr>
<tr>
<td>Half mile station area - w/rail (4)</td>
<td>97</td>
<td>127</td>
<td>142</td>
<td>367</td>
<td>24</td>
</tr>
</tbody>
</table>

Notes:
(1) From State of Wisconsin household projections
(2) Assumes annual replacement demand equal to .5% of housing stock built prior to 1970
    (as reported in the 2000 Census).
(3) Baseline allocates 15% of City demand to half mile ring without commuter rail.
(4) Rail alternative increases half mile ring demand to 20% after 2010.

Source: Valerie S. Kretchmer Associates, Inc.
VI. RETAIL MARKET CONDITIONS AND STATION AREA OPPORTUNITIES

Retail Sales and Sales Per Household

The 2002 Census of Retail Trade provides insight into retail sales activity in the City of South Milwaukee. A detailed table showing sales by category is included in the Appendix. The City had only 34 establishments and $44.6 million in sales in 2002 (the last year data are available). The City’s sales per household figure is very low at only $5,135 compared to the average sales of $23,433 per household in Milwaukee County. This means that residents of South Milwaukee are leaving the city for most of their shopping. There are many categories of stores that are not represented in South Milwaukee, some of which could be appropriate for the station area. Many residents are going to Oak Creek and Franklin for everyday shopping needs.

Expenditure Potential in 2005

Based on its estimated average household income of $54,218 in 2005 and its household composition and age characteristics, Demographics Now estimates that South Milwaukee households have an aggregate retail expenditure potential of $192.9 million, or $22,709 per household. Of this, new car dealers account for 20.4% of household spending, grocery stores account for 15.5%, gasoline stations 10.2%, full service and limited service restaurants 9.6% and department stores (including discount stores) 7.5%. The Appendix provides additional details from Demographic Now regarding spending potential by store category for South Milwaukee’s households.

While South Milwaukee’s spending potential per household is only 91% of the national average (a result of its income and age profile), there is a huge difference in the potential sales compared to the actual sales in the city as reported in the Census of Retail Trade. Thus, there is an opportunity to improve the retail offerings and capture some of the sales going out of the community now.

Shopping Concentrations in or Near South Milwaukee

The downtown area along Milwaukee and Chicago Avenues is the historic retail node for the city. However, as indicated earlier in this report, the downtown area has many vacancies now and is no longer
the prime shopping venue for city residents. Rent for older spaces downtown is very low at approximately $7 per square foot on a gross basis.

Sunrise Plaza, with 70,540 square feet, is located within the half-mile station area and serves some of the convenience needs of area residents with a hardware store, pharmacy, banks and restaurant. The asking rent is $10 per square foot triple net (tenants pay their pro-rata share of real estate taxes, common area maintenance and insurance). The center is 16% vacant.

The largest shopping center in the city is Grant Plaza located on 12th Avenue (Route 32) south of Manitowoc Avenue. The 138,000 square foot center is anchored by a new 59,000 square foot Pick ‘N Save grocery store (which replaced a shuttered Kohl’s) and Walgreens. Smaller tenants include restaurants, fitness center, hair and nail salon, child care center, Blockbuster Video and Family Dollar. The center was substantially upgraded and remodeled in 2005 with $3.5 million in TIF assistance from the City. It is now 80% leased with a median rent of $12 per square foot on a triple net basis. During the renovation, some tenants were moved and the former Kohl’s building was demolished.

There is no new retail space planned in South Milwaukee at this time, though the City is encouraging ground floor retail or commercial space in mixed-use projects. According to retail brokers, new small store space in the south suburbs can rent for as much as $18 per square foot on a triple net basis. Larger stores in the 10,000-15,000 square foot range will rent for $12-13 per square foot triple net.

**Retail/Commercial Land Prices**

There has been very little land sold in or near the station area for retail or commercial development. There have been sales in Cudahy that would be representative of prices for arms length transactions in South Milwaukee. According to the Cudahy City Assessor, retail and commercial land sales in the past few years in Cudahy have ranged from $1.92-$14.96 per square foot. The highest priced land was at the corner of Layton and Packard Avenues and was purchased by Walgreens, which is known to pay a premium for a desired corner parcel with 1-2 acres of land. Banks will also pay a premium for a specific corner location.

A 4.5-acre site at Packard Avenue north of College Avenue in Cudahy with B-2 zoning sold for $9.41 per square foot. This was the only recent retail sale of a sizable parcel. Several parcels of 1 acre or less are
for sale along Packard Avenue at asking prices of $4-6 per square foot for vacant commercially zoned land.

Future Retail Demand in the Station Area

The expenditure categories that are most relevant for built-up areas immediately adjacent to commuter rail stations are convenience stores, specialty stores (including prepared food specialties), pharmacies, eating and drinking places, and personal services. Time-pressed commuters (especially those who are riding long distances possibly to Chicago suburbs) will use the station area to buy breakfast items, snacks, sandwiches, and prepared foods to take home after work. They will also need conveniences such as dry cleaners and personal care (beauty and barbershops), as well as easy-to-carry specialty items such as flowers and cards.

Despite the proximity of the Bucyrus Erie plant to the station, the overwhelming majority of its employees are factory workers who only have ½ hour for lunch and typically bring their lunch. Salaried employees get 45 minutes for lunch but usually bring their lunch as well. The owner of the Subway franchise in South Milwaukee brings in food for employees to purchase. There is additional potential for restaurants in the station area that could also offer carry-in service to Bucyrus employees.

There are redevelopment opportunities in the immediate station area and along Milwaukee Avenue that would be suitable for smaller scale retail development. This could be a free-standing retail building or small shopping center, or part of a mixed-use development, especially on the west side of the railroad tracks. The commuter rail station, in combination with additional residents living in the downtown area, will provide additional demand for the existing, underutilized and in many cases vacant spaces along Milwaukee Avenue. However, Bucyrus occupies such a significant amount of land in the half-mile station area and that is not expected to change in the foreseeable future. Thus there is limited retail development opportunity to the north of Milwaukee Avenue. The City’s Comprehensive Plan envisions a more compact, but stronger retail area along Milwaukee Avenue, which means a potential decrease in the existing retail space at the fringes.

The table below shows the additional retail space that could be absorbed in the half-mile station area. This does not include a calculation of the improved retail offerings in existing downtown buildings that are
expected to occur as a result of the additional housing in the area. These estimates are dependent on the aforementioned development of new housing in the half-mile area.

Table 8

<table>
<thead>
<tr>
<th></th>
<th>2005-2010 Square Feet</th>
<th>2010-2015 Square Feet</th>
<th>2015-2020 Square Feet</th>
<th>Total Square Feet</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005-2010</td>
<td>10,000-15,000</td>
<td>15,000-20,000</td>
<td>15,000-20,000</td>
<td>40,000-55,000</td>
</tr>
</tbody>
</table>
VII. OFFICE MARKET CONDITIONS AND STATION AREA OPPORTUNITIES

Office Market Conditions

There is very little traditional office space in South Milwaukee. According to information from Grubb and Ellis, there is 87,349 square feet of non-owner occupied office space in 9 buildings. Most of the space is Class B in quality (medium quality buildings). There is very little space available now for rent (1.4%), which means that a limited amount of new space could be warranted. The newest building, Tri City South Milwaukee Bank Building, built in 2001, has a small amount of vacant space at an asking rent of $14.50 per square foot on a gross basis. Most of the buildings are small with none larger than 18,000 square feet and many less than 5,000 square feet.

However, local brokers indicated that South Milwaukee is not a location for larger office buildings, as the employment base is not geared to professional, financial and other business services that typically occupy office space. It is on the back side of the airport which caters primarily to industrial and quasi-industrial users rather than office tenants, e.g., freight forwarders, trucking companies, food service.

Office Demand

Office brokers interviewed by VSKA were not optimistic about the potential for a significant amount of office space in the city overall or in the station area, and were cautious about the likelihood in the near term of any significant office development in the station area. However, there would be potential demand for new office space to house professionals who now have limited choices for quality space in small free-standing single or multi-tenant office buildings, or as part of a mixed-use building. Tenants would include medical professionals and allied health care practitioners, attorneys, accountants, financial services, insurance agents, etc.

With rail service, more firms might find a downtown South Milwaukee location attractive. The table below suggests a modest amount of office space that might be absorbed in the station area over the next fifteen years. This does not include the potential for additional office space for Bucyrus Erie. That company is a large property owner downtown and is expanding. It is possible that they would build additional office space for their own use.
**Table 9**

SOUTH MILWAUKEE STATION AREA OFFICE DEMAND FROM 2005-2020

<table>
<thead>
<tr>
<th>2005-2010 (Square Feet)</th>
<th>2010-2015 (Square Feet)</th>
<th>2015-2020 (Square Feet)</th>
<th>Total (Square Feet)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5,000-10,000</td>
<td>10,000-15,000</td>
<td>10,000-15,000</td>
<td>25,000-40,000</td>
</tr>
</tbody>
</table>
VIII. APPENDIX

A. Demographic Maps

1. Median Household Income for ½ and 3 Mile Radii from the Proposed Station
2. Average Household Size for ½ and 3 Mile Radii from the Proposed Station
3. Population Density per Square Mile for ½ and 3 Mile Radii from the Proposed Station

B. 2002 Census of Retail Trade for the City of South Milwaukee

C. Retail Expenditure Potential for City of South Milwaukee
2005 Median Household Income for ½ and 3 Mile Radii from South Milwaukee Station

Legend

Block Groups
Basic Variables (2005) Income: Household Income:
- Above 100,000
- 75,000 to 100,000
- 50,000 to 75,000
- 25,000 to 50,000
- Below 25,000
- No Data

Source: Applied Geographic Solutions © 2005.
DemographicsNow is brought to you by SRC, LLC. © 2005 All Rights Reserved

Date: 05/17/06

Valerie S. Kretchmer Associates, Inc.
### 2002 SOUTH MILWAUKEE RETAIL SALES AND AVERAGE SALES PER HOUSEHOLD

<table>
<thead>
<tr>
<th>SIC Code</th>
<th>Category</th>
<th>Establishments</th>
<th>Sales</th>
<th>2000 Households</th>
<th>Sales/Household</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>#</td>
<td>$</td>
<td></td>
<td>South Milwaukee</td>
</tr>
<tr>
<td></td>
<td><strong>Total Households</strong></td>
<td></td>
<td></td>
<td>8,694</td>
<td></td>
</tr>
<tr>
<td>441</td>
<td>Motor vehicle/parts dealers</td>
<td>4</td>
<td>NA</td>
<td>NA</td>
<td>6,240</td>
</tr>
<tr>
<td>442</td>
<td>Furniture/home furnishing stores</td>
<td>1</td>
<td>NA</td>
<td>NA</td>
<td>797</td>
</tr>
<tr>
<td>443</td>
<td>Electronics/appliance stores</td>
<td>1</td>
<td>NA</td>
<td>NA</td>
<td>802</td>
</tr>
<tr>
<td>444</td>
<td>Building material/garden equipment/supply stores</td>
<td>4</td>
<td>$1,622,000</td>
<td>$187</td>
<td>1,673</td>
</tr>
<tr>
<td>445</td>
<td>Food/beverage stores</td>
<td>7</td>
<td>$11,317,000</td>
<td>$1,302</td>
<td>3,610</td>
</tr>
<tr>
<td>446</td>
<td>Health/personal care stores</td>
<td>2</td>
<td>NA</td>
<td>NA</td>
<td>2,019</td>
</tr>
<tr>
<td>447</td>
<td>Gasoline Stations</td>
<td>4</td>
<td>NA</td>
<td>NA</td>
<td>1,840</td>
</tr>
<tr>
<td>448</td>
<td>Clothing/clothing accessories stores</td>
<td>4</td>
<td>$963,000</td>
<td>$111</td>
<td>1,302</td>
</tr>
<tr>
<td>451</td>
<td>Sporting goods, hobby, book, music stores</td>
<td>1</td>
<td>NA</td>
<td>NA</td>
<td>604</td>
</tr>
<tr>
<td>452</td>
<td>General Merchandise stores</td>
<td>1</td>
<td>NA</td>
<td>NA</td>
<td>3,195</td>
</tr>
<tr>
<td>453</td>
<td>Miscellaneous stores</td>
<td>5</td>
<td>$1,359,000</td>
<td>$156</td>
<td>567</td>
</tr>
<tr>
<td>4531</td>
<td>Florists</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>53</td>
</tr>
<tr>
<td>4532</td>
<td>Office supplies/stationery stores</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>238</td>
</tr>
<tr>
<td>4533</td>
<td>Used merchandise stores</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>94</td>
</tr>
<tr>
<td>4539</td>
<td>Other miscellaneous store retailers</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>181</td>
</tr>
<tr>
<td>454</td>
<td>Non-store retailers</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>783</td>
</tr>
<tr>
<td></td>
<td><strong>Total Retail Sales</strong></td>
<td>34</td>
<td>$44,641,000</td>
<td>$5,135</td>
<td>$23,433</td>
</tr>
</tbody>
</table>

NA: Not Disclosed due to small number of establishments.

Source: US Census, "2002 Census of Retail Trade"; "2000 Census".

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**SOUTH MILWAUKEE MARKET ASSESSMENT**

**KRM Alternatives Analysis**

**EIS and Project Development Phase**

---

**EarthTech**

A Tyco International Ltd. Company
# South Milwaukee Market Assessment

## Demographic Overview

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Population</td>
<td>20,924</td>
</tr>
<tr>
<td>% Male Population</td>
<td>48.90%</td>
</tr>
<tr>
<td>% Female Population</td>
<td>51.10%</td>
</tr>
<tr>
<td>Median Age</td>
<td>39.1</td>
</tr>
<tr>
<td>Population Density</td>
<td>4,372.00</td>
</tr>
<tr>
<td>Total Households</td>
<td>8,494</td>
</tr>
<tr>
<td>Average Household Size</td>
<td>2.4</td>
</tr>
<tr>
<td>Median Income</td>
<td>$48,824</td>
</tr>
<tr>
<td>Per Capita Income</td>
<td>$22,464</td>
</tr>
<tr>
<td>Households Growth from 1990 to 2000</td>
<td>5.80%</td>
</tr>
<tr>
<td>% Owner Occupied Housing Units</td>
<td>60.90%</td>
</tr>
<tr>
<td>% Renter Occupied Housing Units</td>
<td>32.10%</td>
</tr>
<tr>
<td>% Vacant Housing Units</td>
<td>7.00%</td>
</tr>
<tr>
<td>Population Density</td>
<td>4,372.00</td>
</tr>
<tr>
<td>% Owner Occupied Housing Units</td>
<td>60.90%</td>
</tr>
<tr>
<td>Employees</td>
<td>4,944</td>
</tr>
<tr>
<td>Index Average = 100</td>
<td></td>
</tr>
</tbody>
</table>

## Current Year Annual

<table>
<thead>
<tr>
<th>Category</th>
<th>Aggregate Dollars</th>
<th>Average Household Dollars</th>
<th>% of Total</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appliances and Electronics Stores</td>
<td>$2,878,789</td>
<td>$338.92</td>
<td>1.50%</td>
<td>91</td>
</tr>
<tr>
<td>Art Dealers</td>
<td>$10,592</td>
<td>$1.25</td>
<td>0.00%</td>
<td>88</td>
</tr>
<tr>
<td>Auto Parts and Accessories</td>
<td>$1,912,491</td>
<td>$225.16</td>
<td>1.00%</td>
<td>92</td>
</tr>
<tr>
<td>Book Stores</td>
<td>$1,059,744</td>
<td>$124.76</td>
<td>0.60%</td>
<td>87</td>
</tr>
<tr>
<td>Camera and Photography Stores</td>
<td>$285,434</td>
<td>$33.60</td>
<td>0.10%</td>
<td>91</td>
</tr>
<tr>
<td>Children's and Infant's Clothing Stores</td>
<td>$599,127</td>
<td>$70.54</td>
<td>0.30%</td>
<td>89</td>
</tr>
<tr>
<td>Clothing Accessory Stores</td>
<td>$116,627</td>
<td>$13.73</td>
<td>0.10%</td>
<td>88</td>
</tr>
<tr>
<td>Computer Stores</td>
<td>$1,404,968</td>
<td>$165.41</td>
<td>0.70%</td>
<td>90</td>
</tr>
<tr>
<td>Convenience Stores</td>
<td>$1,377,627</td>
<td>$162.19</td>
<td>0.70%</td>
<td>92</td>
</tr>
<tr>
<td>Cosmetics and Beauty Stores</td>
<td>$160,293</td>
<td>$18.18</td>
<td>0.10%</td>
<td>91</td>
</tr>
<tr>
<td>Department Stores</td>
<td>$14,402,957</td>
<td>$1,695.66</td>
<td>7.50%</td>
<td>90</td>
</tr>
<tr>
<td>Drinking Places</td>
<td>$728,722</td>
<td>$85.79</td>
<td>0.40%</td>
<td>90</td>
</tr>
<tr>
<td>Family Clothing Stores</td>
<td>$2,928,528</td>
<td>$344.78</td>
<td>1.50%</td>
<td>90</td>
</tr>
<tr>
<td>Fish and Seafood Markets</td>
<td>$91,676</td>
<td>$10.79</td>
<td>0.00%</td>
<td>92</td>
</tr>
<tr>
<td>Floor Covering Stores</td>
<td>$569,603</td>
<td>$67.06</td>
<td>0.30%</td>
<td>85</td>
</tr>
<tr>
<td>Florists</td>
<td>$154,462</td>
<td>$18.18</td>
<td>0.10%</td>
<td>89</td>
</tr>
<tr>
<td>Fruit and Vegetable Markets</td>
<td>$180,007</td>
<td>$21.19</td>
<td>0.10%</td>
<td>92</td>
</tr>
<tr>
<td>Fuel Dealers</td>
<td>$1,339,673</td>
<td>$157.72</td>
<td>0.70%</td>
<td>93</td>
</tr>
<tr>
<td>Full Service Restaurants</td>
<td>$9,203,279</td>
<td>$1,083.50</td>
<td>4.80%</td>
<td>91</td>
</tr>
<tr>
<td>Furniture Stores</td>
<td>$3,352,413</td>
<td>$394.68</td>
<td>1.70%</td>
<td>89</td>
</tr>
<tr>
<td>Gasoline Stations with Convenience Stores</td>
<td>$13,556,981</td>
<td>$1,596.07</td>
<td>7.00%</td>
<td>92</td>
</tr>
<tr>
<td>Gasoline Stations without Convenience Stores</td>
<td>$6,120,568</td>
<td>$720.58</td>
<td>3.20%</td>
<td>93</td>
</tr>
<tr>
<td>Gift and Souvenir Stores</td>
<td>$364,700</td>
<td>$42.94</td>
<td>0.20%</td>
<td>89</td>
</tr>
<tr>
<td>Grocery Stores</td>
<td>$29,827,674</td>
<td>$3,511.62</td>
<td>15.50%</td>
<td>92</td>
</tr>
<tr>
<td>Hardware Stores</td>
<td>$1,756,455</td>
<td>$206.79</td>
<td>0.90%</td>
<td>89</td>
</tr>
<tr>
<td>Hobby, Toy, and Game Stores</td>
<td>$860,288</td>
<td>$101.28</td>
<td>0.40%</td>
<td>91</td>
</tr>
<tr>
<td>Home Centers</td>
<td>$3,780,680</td>
<td>$445.10</td>
<td>2.00%</td>
<td>90</td>
</tr>
<tr>
<td>Hotels and Other Travel Accomodations</td>
<td>$1,348,408</td>
<td>$158.75</td>
<td>0.70%</td>
<td>90</td>
</tr>
<tr>
<td>Jewelry Stores</td>
<td>$883,894</td>
<td>$104.06</td>
<td>0.50%</td>
<td>86</td>
</tr>
<tr>
<td>Limited Service Restaurants</td>
<td>$9,252,151</td>
<td>$1,089.26</td>
<td>4.80%</td>
<td>91</td>
</tr>
<tr>
<td>Liquor Stores</td>
<td>$1,262,399</td>
<td>$148.62</td>
<td>0.70%</td>
<td>90</td>
</tr>
<tr>
<td>Luggage Stores</td>
<td>$95,410</td>
<td>$11.23</td>
<td>0.10%</td>
<td>90</td>
</tr>
<tr>
<td>Mail Order and Catalog Stores</td>
<td>$4,258,013</td>
<td>$501.30</td>
<td>2.20%</td>
<td>90</td>
</tr>
<tr>
<td>Meat Markets</td>
<td>$383,730</td>
<td>$43.18</td>
<td>0.20%</td>
<td>92</td>
</tr>
<tr>
<td>Men's Clothing Stores</td>
<td>$600,556</td>
<td>$70.70</td>
<td>0.30%</td>
<td>90</td>
</tr>
<tr>
<td>Mobile Home Dealers</td>
<td>$4,658</td>
<td>$50.55</td>
<td>0.00%</td>
<td>89</td>
</tr>
<tr>
<td>Motorcycle and Boat Dealers</td>
<td>$1,615,374</td>
<td>$190.18</td>
<td>0.80%</td>
<td>91</td>
</tr>
<tr>
<td>Musical Instrument Stores</td>
<td>$333,288</td>
<td>$39.24</td>
<td>0.20%</td>
<td>92</td>
</tr>
<tr>
<td>New Car Dealers</td>
<td>$39,258,082</td>
<td>$4,621.86</td>
<td>20.40%</td>
<td>92</td>
</tr>
<tr>
<td>Nursery and Garden Stores</td>
<td>$747,164</td>
<td>$87.96</td>
<td>0.40%</td>
<td>89</td>
</tr>
<tr>
<td>Office and Stationary Stores</td>
<td>$356,772</td>
<td>$42.00</td>
<td>0.20%</td>
<td>89</td>
</tr>
<tr>
<td>Optical Goods Stores</td>
<td>$922,788</td>
<td>$108.64</td>
<td>0.50%</td>
<td>94</td>
</tr>
<tr>
<td>Other Apparel Stores</td>
<td>$453,855</td>
<td>$53.43</td>
<td>0.20%</td>
<td>90</td>
</tr>
<tr>
<td>Other Building Materials Stores</td>
<td>$5,090,416</td>
<td>$599.30</td>
<td>2.60%</td>
<td>89</td>
</tr>
<tr>
<td>Other Direct Selling Establishments</td>
<td>$854,130</td>
<td>$100.56</td>
<td>0.40%</td>
<td>91</td>
</tr>
</tbody>
</table>
## SOUTH MILWAUKEE MARKET ASSESSMENT

<table>
<thead>
<tr>
<th>Current Year Annual</th>
<th>Aggregate Dollars</th>
<th>Average Household Dollars</th>
<th>% of Total</th>
<th>Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other Direct Selling Establishments</td>
<td>$854,130</td>
<td>$100.56</td>
<td>0.40%</td>
<td>91</td>
</tr>
<tr>
<td>Other General Merchandise Stores</td>
<td>$1,688,986</td>
<td>$198.84</td>
<td>0.90%</td>
<td>90</td>
</tr>
<tr>
<td>Other Health and Personal Care Stores</td>
<td>$332,852</td>
<td>$39.19</td>
<td>0.20%</td>
<td>91</td>
</tr>
<tr>
<td>Other Home Furnishing Stores</td>
<td>$813,593</td>
<td>$95.78</td>
<td>0.40%</td>
<td>90</td>
</tr>
<tr>
<td>Other Miscellaneous Retail Stores</td>
<td>$396,492</td>
<td>$46.68</td>
<td>0.20%</td>
<td>92</td>
</tr>
<tr>
<td>Other Specialty Food Markets</td>
<td>$284,487</td>
<td>$33.49</td>
<td>0.10%</td>
<td>92</td>
</tr>
<tr>
<td>Outdoor Power Equipment Stores</td>
<td>$93,857</td>
<td>$11.05</td>
<td>0.00%</td>
<td>89</td>
</tr>
<tr>
<td>Paint and Wallpaper Stores</td>
<td>$157,103</td>
<td>$18.50</td>
<td>0.10%</td>
<td>90</td>
</tr>
<tr>
<td>Pet and Pet Supply Stores</td>
<td>$528,886</td>
<td>$62.27</td>
<td>0.30%</td>
<td>91</td>
</tr>
<tr>
<td>Pharmacy and Drug Stores</td>
<td>$3,969,988</td>
<td>$467.39</td>
<td>2.10%</td>
<td>91</td>
</tr>
<tr>
<td>RV Parks</td>
<td>$17,522</td>
<td>$2.06</td>
<td>0.00%</td>
<td>91</td>
</tr>
<tr>
<td>Record, Tape, and CD Stores</td>
<td>$638,859</td>
<td>$75.21</td>
<td>0.30%</td>
<td>92</td>
</tr>
<tr>
<td>Recreational Vehicle Dealers</td>
<td>$48,519</td>
<td>$5.71</td>
<td>0.00%</td>
<td>92</td>
</tr>
<tr>
<td>Rooming and Boarding Houses</td>
<td>$9,515</td>
<td>$1.12</td>
<td>0.00%</td>
<td>91</td>
</tr>
<tr>
<td>Sewing and Needlecraft Stores</td>
<td>$160,590</td>
<td>$18.91</td>
<td>0.10%</td>
<td>89</td>
</tr>
<tr>
<td>Shoe Stores</td>
<td>$1,623,353</td>
<td>$191.12</td>
<td>0.80%</td>
<td>92</td>
</tr>
<tr>
<td>Special Food Services and Catering</td>
<td>$1,549,349</td>
<td>$182.41</td>
<td>0.80%</td>
<td>91</td>
</tr>
<tr>
<td>Sporting Goods Stores</td>
<td>$1,763,401</td>
<td>$207.61</td>
<td>0.90%</td>
<td>90</td>
</tr>
<tr>
<td>Tire Dealers</td>
<td>$869,047</td>
<td>$102.31</td>
<td>0.50%</td>
<td>92</td>
</tr>
<tr>
<td>Used Merchandise Stores</td>
<td>$312,575</td>
<td>$36.80</td>
<td>0.20%</td>
<td>89</td>
</tr>
<tr>
<td>User Car Dealers</td>
<td>$2,752,452</td>
<td>$324.05</td>
<td>1.40%</td>
<td>92</td>
</tr>
<tr>
<td>Vending Machines</td>
<td>$574,877</td>
<td>$67.68</td>
<td>0.30%</td>
<td>92</td>
</tr>
<tr>
<td>Warehouse Superstores</td>
<td>$5,860,204</td>
<td>$689.92</td>
<td>3.00%</td>
<td>91</td>
</tr>
<tr>
<td>Women's Clothing Stores</td>
<td>$1,697,237</td>
<td>$199.82</td>
<td>0.90%</td>
<td>90</td>
</tr>
<tr>
<td>Total Annual Retail</td>
<td>$192,889,190</td>
<td>$22,708.88</td>
<td>100%</td>
<td>91</td>
</tr>
</tbody>
</table>

**Current year data is for the year 2005, 5 year projected data is for the year 2010. More About Our Data.**

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