

PREPARED FOR:

Charter Township of Hampton  
801 W. Center Rd.  
Essexville, MI 48732

# Our Strategy for Economic Success

## HAMPTON TOWNSHIP, MI

DRAFT 2: JULY 2020



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# ABOUT CAMOIN 310

Camoin 310 has provided economic development consulting services to municipalities, economic development agencies, and private enterprises since 1999. Through the services offered, Camoin 310 has served EDOs and local and state governments from Maine to California; corporations and organizations that include Amazon, Lowes Home Improvement, FedEx, Volvo (Nova Bus) and the New York Islanders; as well as private developers proposing projects in excess of \$6 billion. Our reputation for detailed, place-specific, and accurate analysis has led to over 1,000 projects in 40 states and garnered attention from national media outlets including Marketplace (NPR), Crain's New York Business, Forbes magazine, The New York Times, and The Wall Street Journal. Additionally, our marketing strategies have helped our clients gain both national and local media coverage for their projects in order to build public support and leverage additional funding. We are based in Saratoga Springs, NY, with regional offices in Richmond, VA; Portland, ME; Boston, MA; and Brattleboro, VT. To learn more about our experience and projects in all of our service lines, please visit our website at [www.camoinassociates.com](http://www.camoinassociates.com). You can also find us on Twitter @camoinassociate and on Facebook.

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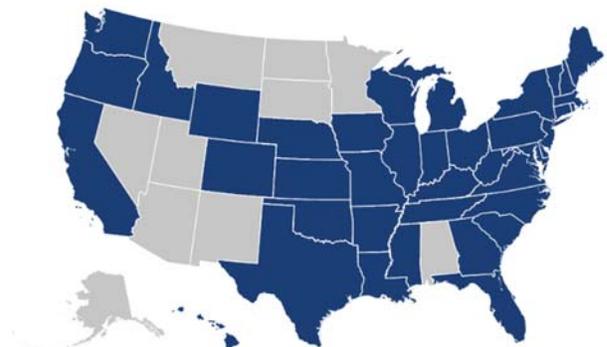




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# EXECUTIVE SUMMARY:

## OUR STRATEGY FOR ECONOMIC SUCCESS

Recognizing the need to diversify and expand the local economy and tax base, Hampton Township has proactively embarked on a process for developing an Economic Recovery and Development Strategy that offers a blueprint for repositioning the community's economy. This Strategy is the culmination of a months-long effort to understand and measure Hampton Township's assets and challenges, identify opportunity industries for business attraction and expansion, and position strategic sites for development.

The strategic planning process included several components, including a baseline economic analysis, target industry analysis, creation of site intelligence reports, public engagement through a community survey and presentation, and input from a steering committee of community and regional stakeholders.

The recommended actions developed as part of this strategy will serve to guide Hampton Township and its partners in capturing investment as economic development opportunities come along and are targeted and secured. The end result will be an economically resilient and fiscally healthy community that continues to be a great place to live, do business, and have fun.

### OUR ASSETS & CHALLENGES

Hampton Township's rural, agricultural character together with our close proximity to the Bay City region's urban center make our community a desirable place to live. The natural beauty of Saginaw Bay, Quanicassee Willdlife Area, and our trail system are just some of the recreational amenities that contribute to our high quality of life. Our well-regarded school system, affordable cost of living, and access to jobs in Bay City, Saginaw, and Midland are also key assets that attract people to Hampton Township.

We are well served by utilities—including electric, natural gas, water, sewer, and internet—which are important for business attraction and expansion and is a differentiating factor for a community that is largely rural. We also have a diverse mix of existing buildings for redevelopment and large, flat sites for new development. The broader Saginaw-Midland-Bay City region's wage rates are competitive nationally for many types of industries.

At the same time, we must contend with a shrinking and aging population, an issue that has become a fact of life in many communities throughout Michigan and the US. This can put us at a disadvantage when it comes to attracting industries that rely on a sizable workforce and retailers that need a strong customer base. Our geography can also be a limiting factor in that we do not have direct access to an interstate highway and are located at the edge the region's population center, though it does position us as a gateway to and from the Thumb area of the state.

Our primarily rural character means that we do not have a well-defined town center or strong community brand identity that distinguishes us from other townships. While we have convenient access to daily essentials like groceries, we often have to leave Hampton Township for more varied stores, entertainment, and dining options. We have a considerable amount of vacant commercial space and an aging commercial building stock, which can be a challenge for attracting businesses seeking updated space.

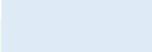
We also struggle with rising municipal costs and a weakening property tax base, which puts increasing financial pressure on our residents. However, by leveraging our unique assets, we can position our community to seize on development and investment opportunities that will strengthen our fiscal condition and help us sustain our high quality of life.

Our major assets and challenges are summarized below and explored in depth throughout this strategy.



## ASSETS

- High quality of life
- Agricultural character and history
- Natural beauty and recreational amenities, including Saginaw Bay and trail system
- Sense of community and strong volunteerism
- Public safety services
- Amenities and services for seniors
- Pedestrian facilities along Center Avenue
- BayMetro bus service
- Utilities generally available and competitive with other regions in Michigan
- Essexville-Hampton Schools well regarded
- Proximity to amenities and services in Bay City
- Large flat sites plentiful throughout the Township
- Existing sites primed for redevelopment
- Lower property tax rates relative to Bay City and Essexville
- Affordable cost of living relative to nation
- Competitive labor rates relative to other parts of Michigan and nation
- Economic development partnership with Bay Future, Inc.



## CHALLENGES

- Lack of distinguishing identity relative to other communities in the region
- Aesthetic quality along principal commercial corridor (Center Avenue)
- Limited dining and entertainment options
- Certain retail offerings not present
- High commercial vacancies
- Aging building stock
- Declining and aging population
- Lower household incomes compared to region and state
- No direct access to major freeways
- Privatization and tolling of Liberty and Independence bridges
- Limited rail access
- Limited commercial use potential of Saginaw Bay
- Flooding risk along waterways
- Lack of economic diversification
- Heavy reliance on Consumers Energy for tax base
- Higher property tax rates compared to other townships in Bay County
- Limited resources to offer financial incentives for business attraction

## OUR OPPORTUNITIES

Through analysis of our assets and challenges and extensive industry research, our community has identified the following as opportunities for economic development.

- ◆ Hampton Township's agricultural history, focus, and existing assets can be leveraged for attracting and growing food processing industries.
- ◆ The Township has a considerable inventory of vacant commercial space for available for reuse and repurposing. Building rehabilitation costs are typically cheaper than new construction, which gives existing building stock an advantage over greenfield sites. The Hampton Towne Center mall in particular can host a variety of potential opportunities. Many malls are converting to multi-user health care centers, industrial uses, office space, housing, and more.
- ◆ The broader region hosts existing renewable energy assets such as solar and wind farms. Existing electrical utility infrastructure assets could provide a means for future industry growth. Bay, Tuscola, and Huron counties also have the highest wind speeds in the state according to the National Renewable Energy Laboratory (NREL) making wind particularly attractive (as well as the location of the existing Consumers wind energy farm).
- ◆ Competitive labor rates, utility availability, the existing Consumers Energy talent pool, and proximity to manufacturers and supply chain establishments downstate could be leveraged to develop various manufacturing industries (e.g. plastics and chemical, metal, electronic and sensor components, transportation equipment).
- ◆ Existing vacant commercial space could be converted or used for medical office. Proximity to Bay City Medical Center makes this attractive. Traditional office space may also be leveraged by related health and government users.
- ◆ Hampton Township has a cluster of senior living facilities along Pine Road with easy access to shopping and medical services. This is an opportunity to further cater to the Bay City region's growing senior population by broadening the living options available and expanding senior-oriented amenities and services.
- ◆ Hampton Township residents make many of their retail purchases outside of the community, meaning that there is some opportunity for retail, dining, recreation, and entertainment within Hampton Township to recapture a portion of this spending. The community survey pointed to a desire for more full-service restaurants and hardware stores, in particular.
- ◆ The Township has several large greenfield sites along M-25 that are already served by infrastructure and can be positioned for business attraction and development.
- ◆ The Consumers Energy site, while not a focus site in this strategy, holds a tremendous amount of redevelopment potential with its large size, location at the mouth of the Saginaw River, and multi-modal road, waterway, and rail access.

## HOW WE ACHIEVE SUCCESS

The following recommendations serve to guide Hampton Township and its partners as the planning process evolves from analysis and strategy development to implementation. The recommendations are summarized into six broad categories and are detailed below.

1. Unify around a common vision.
  - a. Unify Township Boards, staff, and residents around a shared vision for attracting investment.
  - b. Reach consensus on targeted industries and development locations.
2. Convey a pro-business, development-friendly Hampton Township brand.
  - a. Develop a protocol for meeting with prospective investors.
  - b. Ensure all site listings are complete and up to date on site selection websites.
  - c. Work with property owners and brokers to list additional high potential sites.
  - d. Create an economic development page on Hampton Township's website.
  - e. Host a roundtable event for community board members to listen to the concerns of existing businesses.
  - f. Encourage community leaders and board members to spread the word about Hampton Township's vision and success stories.
3. Adapt regulations and approvals processes to align with development vision.
  - a. Streamline development approvals process.
  - b. Create a Developer's Handbook.
  - c. Adapt regulations to accommodate desired development.
  - d. Clarify policies on granting development incentives.
  - e. Consider adopting property tax abatement programs under PA-210 and/or PA-198.
4. Continue to invest in infrastructure.
  - a. Invest in fiber internet infrastructure in our commercial and industrial districts.
  - b. Pursue infrastructure upgrades at key development sites.
  - c. Invest in "quality of place" infrastructure that enhances Hampton Township as a desirable place to live and work.
5. Explore opportunities for municipal cost savings and new funding sources.
  - a. Identify ways to reduce administrative costs and provide services more efficiently.
  - b. Pursue State and Federal funding sources.
6. Collaborate with partner organizations.
  - a. Partner with and support Bay Future, Inc., in regional business and investment attraction efforts.
  - b. Work with Consumers Energy in redeveloping the power plant site.
  - c. Partner with Eastern Michigan Council of Governments on regional economic development efforts.
  - d. Convene key members of the Hampton Township Economic Development Strategy Steering Committee on a quarterly basis for ongoing advisory and coordination.

## 1. Unify Around a Common Vision

Hampton Township's highest priority should be to unify Township Boards, staff, and residents around a shared vision for attracting investment into the community. This is a high-impact, low-cost action item that is critical for competitively positioning the Township for economic development. We must recognize that we are competing with all other communities in the region for investment, and an important way we can distinguish ourselves is to positively affirm our commitment to attracting development that will strengthen our tax base and employment base.

While new investment anywhere in our county and region is a win for all, we must also acknowledge that the future fiscal health of our community depends on our ability to attract development within our Township's boundaries. Therefore, we must work to ensure that our Board of Trustees, Planning Commission, and other decision-making bodies are unified in pursuing a common vision for the Township.

Specifically, this means reaching consensus on and clearly articulating the targeted industries and location of development that the community desires to pursue. While the Township's Master Plan, future land use map, and zoning regulations convey this vision to some degree, more deliberation and agreement is needed to ensure that decision-making reflects a long-term development strategy. This Economic Development strategy has identified and described an extensive list of opportunity industries that the Township is well positioned to attract, as well as five development sites that can accommodate them. When investors come forward in search of development sites in our region, all bodies representing Hampton Township must convey a unified position so that we are not passed over for another community that is better prepared to act.

This is not to say that we must accept any and all development proposals that comes forward; instead it means that we need to be clear and united about our vision and expectations for our community. Results from the community survey conducted for this Strategy indicate that the vast majority of residents agree that attracting new development should be a priority, and more than half of residents would be willing to accept new development that significantly contributes to our tax base and creates jobs even if it comes with some negative impacts. This indicates broad public support for development.

## 2. Convey a Pro-Business, Development-Friendly Hampton Township Brand

Once our community has decided on a shared vision for future development, our community "brand" must be communicated to existing and prospective investors, developers, and businesses, as well as regional partner organizations and other members of the community. This can be achieved in several ways:

- ◆ Develop a protocol for meeting with prospective investors when leads come through the pipeline. Provide marketing collateral, facilitate site tours, schedule meet-and-greets with key Township decision-makers, etc.
- ◆ Ensure all site listings are complete and up to date on state and regional site selection websites, including GreatLakesBaySites.com and SiteSelection.MichiganBusiness.org. Post sell sheets for the five identified sites that were created for this Strategy. Work with property owners to list additional high potential sites.
- ◆ Create an economic development page on Hampton Township's website with links to resources and site listings.
- ◆ Host a roundtable event for community board members to listen to the concerns of existing businesses in order to understand and address issues and promote retention of our local businesses.
- ◆ Encourage community leaders and board members to spread the word about Hampton Township's vision and success stories, including through press releases.

### 3. Adapt Regulations and Approvals Processes to Align with Development Vision

In selecting a place to invest, developers highly value certainty in the development approvals process. They want a well-defined expectation of development requirements, the different steps in the process, and the timeline. This minimizes risk for the developer, making it more likely for them to choose a community where they know what to expect.

Hampton Township should work to streamline its development approvals process, and to the extent possible, minimize the number of meetings required between applicants and various approving bodies. Our community should also create a Developer's Handbook that gives prospective investors a roadmap and timeline for navigating through various processes, including site plan approval, special use variance, rezoning, and others. For example, the handbook would include a step-by-step guide to each process, a list of documents needed, required fees, timeline for each step, incentive eligibility, etc.

The Township should also adapt regulations to accommodate desired development. This can be done by first identifying the extent to which targeted industries operationally comply with current uses in Hampton's industrial and commercial zoning districts to facilitate the development process for developers and industries looking to invest. Hampton Township should also explore the potential to expand the list of uses in the commercial and industrial districts that are not currently listed as permitted uses, as appropriate.

If any rezoning is to be considered to allow for additional commercial or industrial development outside of those properties that are currently zoned to accommodate these types of uses, the rezoning should consider the Township's Master Plan and a balance between further development and the Township's current character and identity. Rezoning recommendations are discussed in Chapter 4 of this Strategy.

Clarifying policies on granting development incentives is also critical to a transparent approvals process. The Board of Trustees and the Downtown Development Authority should establish clear and uniform eligibility criteria for various incentive programs so that it is apparent to investors from the start whether or not they can expect to be awarded tax abatements or other incentives.

The Township should consider adopting a Commercial Rehabilitation District under Public Act 210 and/or an Industrial Development District under Public Act 198. These mechanisms make qualifying properties located within the districts eligible for full or partial property tax abatements. These tools are common in townships throughout Michigan and would allow Hampton Township to focus development in certain parts of the community and compete for investment with other communities where these incentives are in place. Fact sheets on these tools are included in Appendix D.

### 4. Continue to Invest in Infrastructure

Infrastructure investments can help prepare specific opportunity sites for attracting investment as well as contribute to the overall quality of life in Hampton Township. While most parts of our community that are zoned for commercial and industrial development have access to standard electric, gas, water, sewer, and telecom infrastructure, certain sites will require infrastructure upgrades in order to attract higher-capacity utility users, such as manufacturers. In particular, we should invest in fiber internet infrastructure in our commercial and industrial districts in order to offer faster internet speeds to industry. Additional site-specific utility upgrade recommendations are discussed in Chapter 4 of this Strategy in Table 25.

We should also continue to invest in "quality of place" infrastructure that enhances Hampton Township as a desirable place to live. Building on existing amenities, such as trails, parks, bay access, pedestrian and streetscape

facilities, etc., not only makes our community attractive to residents, but it also plays a role in enticing businesses who want to locate in places where their employees have access to recreational amenities and can enjoy a high quality of life.

## 5. Explore Opportunities for Municipal Cost Savings and New Funding Sources

With the closing of Consumers Energy, we will be losing a significant source of property tax revenue. In addition to working to increase revenues through economic development, we can continue to explore opportunities to save on the expense side of the Township budget. This may include finding ways to reduce administrative costs and provide services more efficiently. All options should be explored.

We can also pursue State and Federal funding sources that offer grants and loans for infrastructure projects, business assistance, or technical/planning assistance. For example, this Strategy was funded by a US EDA grant for coal-impacted communities. In particular, the Township should pursue funding opportunities related to the US EDA's Coronavirus Aid, Relief, and Economic Security Act (CARES Act), which provides a wide variety of economic development assistance.

## 6. Collaborate with Partner Organizations

While there are many things that Hampton Township can do on its own to position itself for economic development, the role of regional partnerships cannot be overstated.

It is typically not the function of townships to actively generate leads for business and investment attraction; such efforts generally are most successful when undertaken at the regional level. Therefore, it will be essential to partner with our regional economic development organization, Bay Future, Inc. (BFI), on business attraction efforts. Hampton Township should financially contribute to BFI to support the organization's mission of marketing and bringing investment to the Bay County region. A close partnership with BFI will pay dividends in delivering investment leads, which Hampton Township does not have the staff capacity to pursue on its own.

Hampton Township should communicate to BFI the targeted industries it hopes to attract so that BFI can assist with pursuing and directing leads to Township leadership. For example, given the opportunities identified in this Strategy, priority attraction initiatives should include bringing a large industrial user to the industrially zoned site on West Center Road (Site #3, as detailed in Chapter 4) and attracting a mixed-use redevelopment project to Center Avenue (Site #4 and/or Site #5, as detailed in Chapter 4).

Though outside the scope of this Strategy, the Consumers Energy site is a critically important opportunity for attracting substantial investment to Hampton Township. Consumers-owned parcels constitute the vast majority of industrially zoned acreage in Hampton Township and therefore will need to be a key area of focus going forward. The Township should partner with both BFI and Consumers Energy to bring such a project to fruition.

Eastern Michigan Council of Governments (EMCOG) is another important partner to continuing collaborating with throughout the implementation of this Strategy. The findings and recommendations contained in this document go hand-in-hand with EMCOG's ongoing work in developing a Comprehensive Economic Development Strategy (CEDS) for the 14-county Eastern Michigan region.

It is recommended that the Township continue to convene key members of the Hampton Township Economic Development Strategy Steering on a quarterly basis for ongoing advisory and coordination on all initiatives detailed above.



# 1 | ABOUT THIS STRATEGY

Hampton Township was awarded a grant by the US Department of Commerce Economic Development Administration for coal-impacted communities to fully fund an economic recovery and development strategy to guide the community's economic development efforts over the next five years. The purpose of the plan is to lay out a course of action that positions Hampton Township to cultivate an enhanced employment and tax base through business expansion, attraction, and retention. Expanding and diversifying the community's economic base not only provides job opportunities and amenities for residents; it is also critical in generating taxes needed to fund essential services and projects that make Hampton Township an attractive place to live.

Hampton Township initiated the strategic planning process in January 2020, guided by the consultant team of Camoin 310 and Bergmann and a steering committee comprised of about 20 regional stakeholders. The planning process consisted of several components:

- ◆ **Baseline Economic Analysis** – assesses current economic conditions in the community
- ◆ **Target Industry Analysis** – identifies and analyzes opportunity industries for expanding and diversifying the community's industry base, including insights from market intelligence calls made to businesses throughout the Great Lakes region
- ◆ **Assets and Challenges Analysis** – catalogs the community's assets and challenges to inform strategies for capturing opportunities and addressing issues
- ◆ **Site Intelligence Reports** – information on 5 development sites in Hampton Township, including a detailed engineering assessment, recommended uses based on market conditions, and cutsheets to be used for marketing
- ◆ **Community Engagement** – input from Hampton Township's residents and workers via a survey on what is needed to position the community for economic success
- ◆ **Steering Committee Meetings** – engagement from the stakeholder committee to drive the direction of the strategy
- ◆ **Recommended Actions** – strategy recommendations for advancing economic development goals
- ◆ **Final Presentation** – the consultant team presented findings to the community

This strategy is organized into four chapters with an executive summary and appendices. The executive summary lays out the key assets, challenges, and opportunities for economic development, including a list of recommended actions. The body of the report details the project purpose, summarizes baseline conditions, discusses opportunity industries, and identifies the five intelligence report sites. The report contains three appendices: (1) community survey results, (2) the detailed baseline economic analysis, and (3) the full site intelligence reports.

It is important to acknowledge that the Covid-19 pandemic and resultant economic downturn arose about midway through this process and will no doubt have an impact on potential for economic development. While a few industries have benefited from Covid-19, most have experienced contractions as consumer spending has dropped precipitously creating negative ripple effects throughout the economy. However, this time of uncertainty can be viewed as a chance to implement recommended strategies that will strongly position Hampton Township for investment once the dust has settled.

## GEOGRAPHIC STUDY AREAS

Throughout this report we refer to a number of different geographic study areas that are used as benchmarks for Hampton Township’s economic performance. These areas are defined as follows.

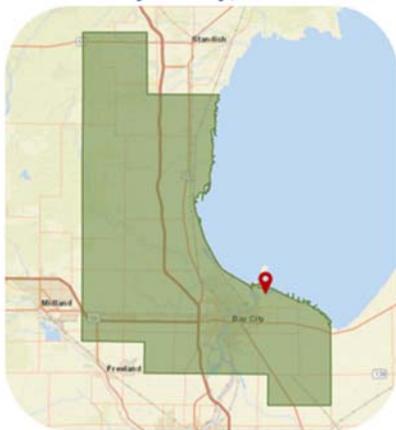
**Hampton Township Area:** Industry data is available at the ZIP code level and not the municipal level, therefore, the 48732 ZIP code was utilized as it best represents Hampton Township geographically.

**Regional Comparison Geographies:** Bay County, the Bay-Saginaw-Midland Combined Statistical Area (CSA), and the State of Michigan. The Bay-Saginaw-Midland CSA is a cumulative geography combining all of area in Bay, Saginaw, and Midland counties.

Hampton Township Area



Bay County, MI



Bay-Saginaw-Midland CSA



State of Michigan



 Location of Hampton Township

## 2 | HAMPTON TOWNSHIP TODAY

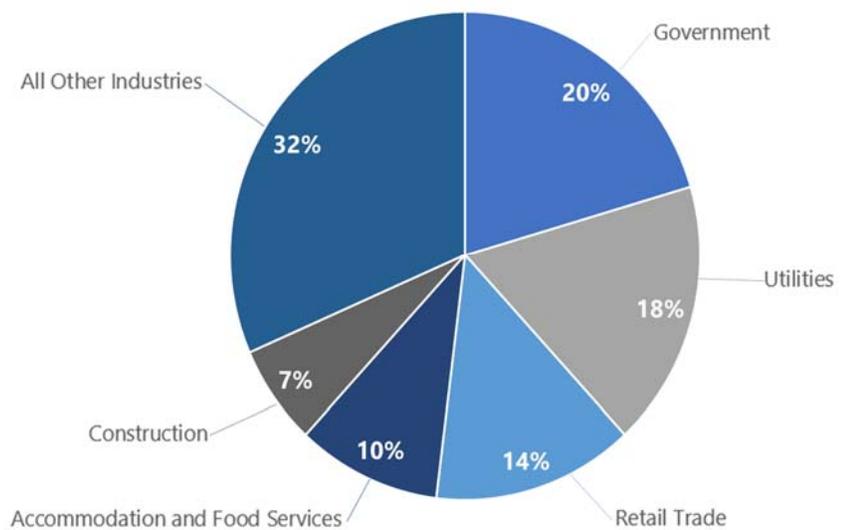
Understanding Hampton Township's economic situation today is a critical first step for developing strategies for future growth. The community's industry and employment makeup, fiscal condition, demographics, and infrastructure all impact future economic development potential. Recognition of how these factors may be impacted by trends and events outside of the community's control ensures that Hampton Township will be prepared to leverage opportunities and remain resilient against challenges.

### 2.1 | OUR ECONOMY

The top 5 industries by total jobs in the Hampton Township Area accounted for approximately 70% of total jobs in 2019, and include Government, Utilities, Retail, Food Services, and Construction. Government jobs are primarily focused in public schools and local government, while utilities jobs are primarily tied to the Consumers Energy power plants.

Figure 1

Top 5 Industries by Total Jobs, Hampton Township Area



Source: EMSI

Compared to the broader region and state, Hampton Township is overrepresented in Government and Utilities sectors and notably underrepresented in Manufacturing and Health Care, suggesting opportunities to grow these sectors.

Hampton Township has historically relied on the Consumers Energy plants as a major employer and contributor to the Township's tax base. However, as a result of the decommissioning of the Weadock coal generation facility (closed in 2016) and Karn coal and gas facilities (set to close by 2023 and 2031, respectively), the Township will lose its single largest property tax payer and employer. The Karn plant currently employs approximately 300 people who live throughout the region.

Other major employers in Hampton Township include: Bay Regional Medical Center, Meijer, Kroger, Essexville-Hampton Public Schools, the Michigan Department of Human Services, and Hampton Charter Township.

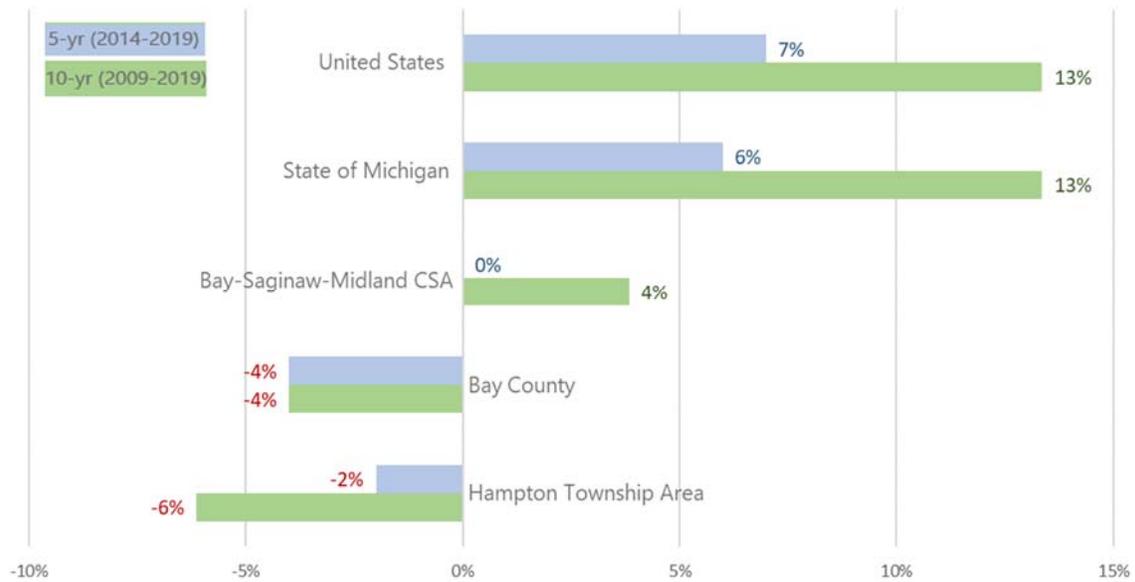
Figure 2 summarizes job growth in the Hampton Township Area, Bay County, Bay-Saginaw-Midland CSA, State of Michigan, and United States over the last five (2014-2019) and ten (2009-2019) years.

The United States, State of Michigan, and Bay-Saginaw-Midland CSA all realized positive overall job growth over the past decade, while Bay County and the Hampton Township Area realized overall job losses.

The Hampton Township Area realized a loss of approximately 200 jobs (a 5% job loss), while Bay County realized a loss of approximately 1,700 jobs (a 6% job loss) from 2009 to 2019.

**Figure 2**

**Percent Change in Total Jobs, Regional Comparison (2009-2019)**



Source: EMSI

Figure 3 summarizes the top 5 industries in the Hampton Township Area by total job gains and total job losses from 2009 to 2019. The Transportation and Warehousing industry realized the largest job gains, approximately 51% of which were in the General Freight Trucking industry. The Retail Trade industry realized the largest amount of job losses.

Figure 3

**Top 5 Industries by Total Job Gains and Losses, Hampton Township Area (2009-2019)**

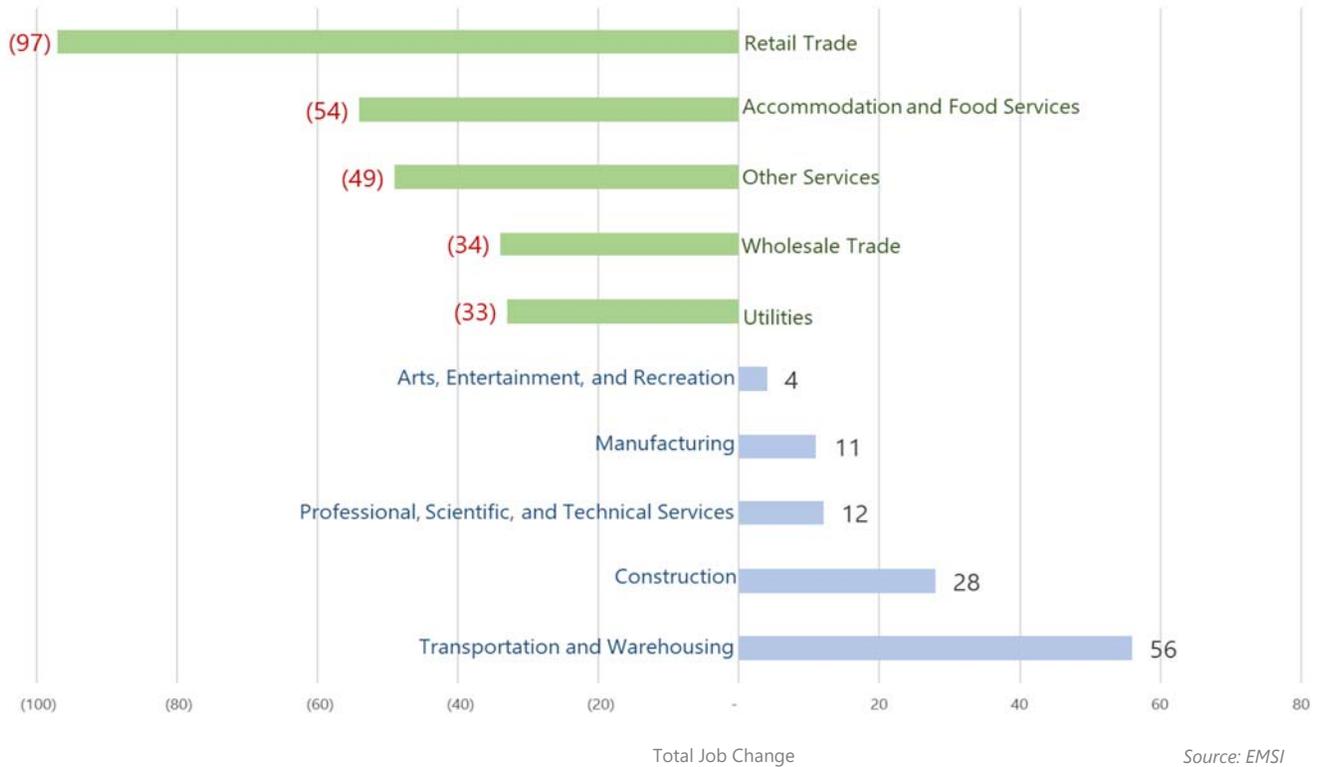
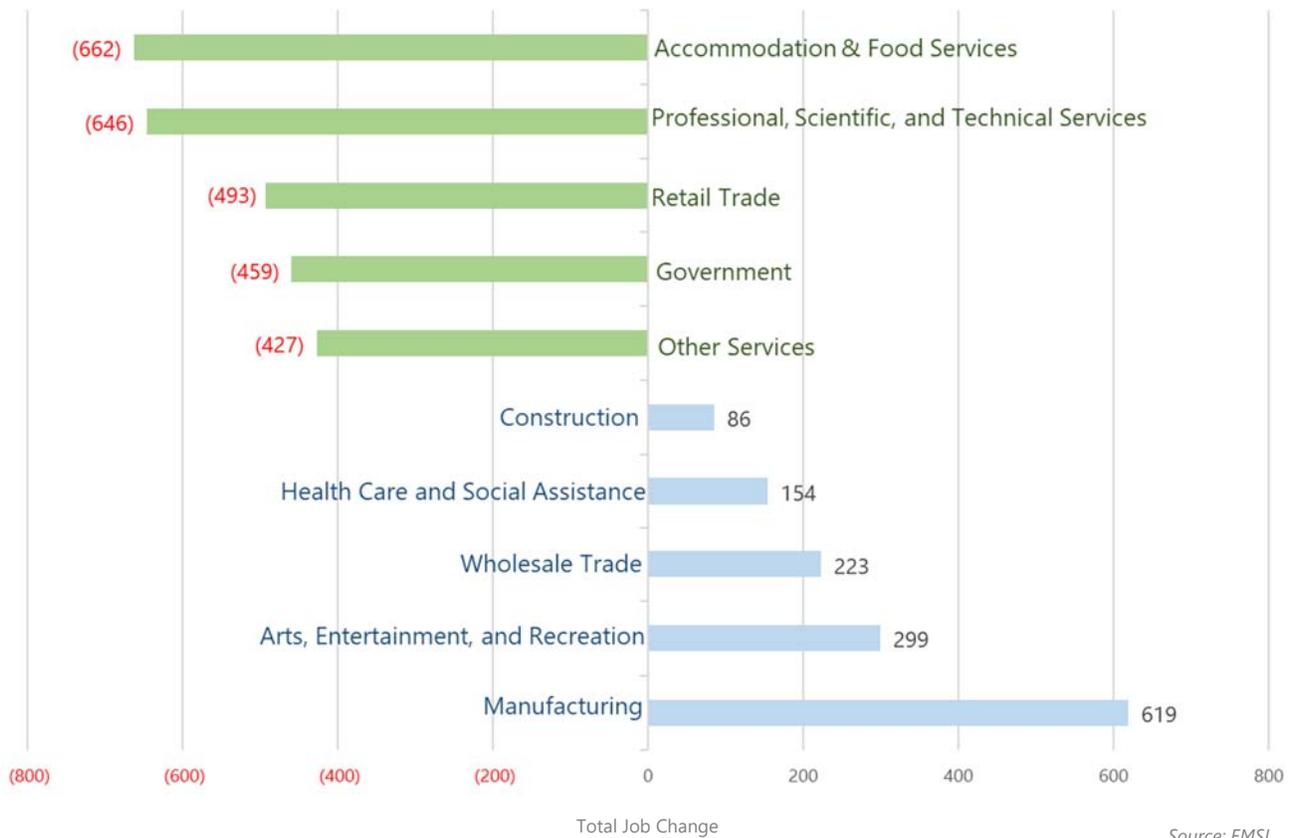


Figure 4 summarizes the top 5 industries in Bay County by total job gains and total job losses from 2009 to 2019. The Manufacturing industry realized the largest job gains, approximately 52% of which were in the Unlaminated Plastics Film and Sheet (except Packaging) Manufacturing industry. The Accommodation and Food Services industry realized the largest amount of job losses.

Figure 4

**Top 5 Industries by Total Job Gains and Losses, Bay County (2009-2019)**



For detailed information on Hampton Township’s economy, please reference Appendix B: Baseline Economic Analysis.

## 2.2 | OUR FISCAL CONDITION

In recent years Hampton Township has contended with rising expenses associated with infrastructure maintenance, service provision, and other costs and continues to explore options for cutting expenditures.

Property taxes are the single largest revenue source for the Township, meaning that the community is quite reliant on property tax in order to deliver essential government services, including police, fire, road maintenance, and more. In 2019, Consumers Energy contributed about 30% of the Township's total property tax revenues, the most of any taxpayer. However, as operations continue to phase out, Consumers Energy's annual property tax payments to Hampton Township have fallen by 50% between 2011 and 2019, from over \$1.5 million to about \$750,000.<sup>1</sup>

With the closure of the Karn coal plant by 2024, Consumers property tax payments to Hampton Township will decrease by another \$420,000, equivalent to losing 17% of the Township's 2019 property tax revenues, and then will fall further with the ultimate closure of the Karn gas plant by 2031. Note that these figures do not account for tax payments that Consumers makes to other taxing jurisdictions, including Essexville-Hampton Public Schools and Bay County. The Schools and the County will also see declines in property tax revenues as a result of the planned plant closures.

The resulting budgetary shortfalls will need to be made up through a combination of reducing expenses and increasing revenues. Economic development can be an important part of helping the community and region through this challenge by diversifying the tax base and creating employment opportunities.

## 2.3 | OUR DEMOGRAPHICS

Population, household income, and other demographic data and trends are important to further understand the composition of an economy, and when combined with industry and occupation data can help set a comprehensive baseline of understanding of local and regional economies that can be leveraged in future strategic planning efforts.

The total population in Hampton Township decreased by 2% from 2010-2019, which aligns with trends in Bay County and the Bay-Saginaw-Midland CSA over the past decade.

In addition, Hampton Township has a comparatively low household income relative to the broader Saginaw-Midland-Bay City region, Michigan, and the US as a whole. There are a higher percentage of households in Hampton Township that have an income of less than \$35,000 than in any other comparison geography.

Modest incomes are in part driven by the Hampton Township's large elderly population. The community has a median age of 47, the highest of all comparison geographies. Nearly 41% of the population is over the age of 55.

Stagnant or negative population growth in a region can signal to investors that it may be difficult to access a needed workforce for some subsectors or customer base in the case of retail and restaurant industries. However, wages that are lower compared to other regions can also be attractive to businesses seeking to lower labor costs. The aging population also presents opportunities for catering housing, amenities, and services to the elderly.

Additional demographic information can be found at the end of Appendix B: Baseline Economic Analysis.

<sup>1</sup> Figures provided by Hampton Charter Township

## 2.4 | OUR INFRASTRUCTURE

The Township's utility and transportation infrastructure are key assets to leverage when attracting new development to the community. Zoning is also an important consideration to ensure that sites that are well-served by infrastructure allow for the type of development that is desired.

### UTILITIES

Utilities are generally available within the Township although improvements to infrastructure may be required for end users with especially high utility needs and for certain locations in the eastern part of the Township.

#### Electric

Consumers Energy (CE) is the main electric provider in the Township although some isolated spots are served or can be served by Bay City Electric Light & Power. CE provides electric service to a majority of the Lower Peninsula. CE rates for commercial and industrial facilities are determined based on how the service is brought to a given facility. For example, there are different rates if the facility owns the electrical equipment versus Consumers owning the equipment. Consumers rates for General Service Primary vary between approximately \$0.07 and \$0.12 per kWh depending on the time of year and day, which is generally competitive with other regions of the state. Michigan as a whole has electricity rates that are slightly higher than average compared to other states, ranking 31<sup>st</sup> out of 50 (with 50<sup>th</sup> being the most expensive) for industrial rates and 39<sup>th</sup> when all rate types are considered.<sup>2</sup>

#### Natural Gas

Consumers Energy is also the natural gas provider for Hampton Township, along with approximately one third of the Lower Peninsula. Consumers commercial distribution rates are established based on customer demand and vary between \$1.97 and \$3.26 per 1,000 cubic feet of gas used, consistent with other regions throughout the state. Compared nationally, Michigan's natural gas cost ranking varies considerably based on the type of user. While average residential rates are the 9<sup>th</sup> lowest in the nation, commercial rates rank 14<sup>th</sup>, and industrial rates are slightly costlier than average at 29<sup>th</sup>. (Note that 50<sup>th</sup> is the most expensive.)<sup>3</sup>

#### Water and Sewer

Rates are managed by the Township and water is purchased through the Bay Area Water Treatment Plant. Rates are considerably lower than those in nearby urban communities including Bay City and Saginaw.

#### Internet

The availability of different sources of internet varies across the Township, including cable, DSL, fiber, and wireless.

<sup>2</sup> U.S. Energy Information Administration, 2019 data

<sup>3</sup> U.S. Energy Information Administration, 2019 data

## TRANSPORTATION

Hampton Township is almost exclusively served by road, with the key exception of the Consumers Energy site, which has both rail and water access as noted below.

### Roads

Hampton Township is strategically located between Michigan's "Thumb" area and points to the north and west. While there are all-season roads and a State Highway (M-25) within the Township itself which facilitates year-round transit and trucking, the fact that the Township is isolated from major Interstate Highways (I-75 and I-69) may be a deterrent for some types of development. Future toll bridges may present an inconvenience for vehicular travel to and from the north, though M-25 is not associated with these bridge privatization projects.

### Waterways

Although Saginaw Bay makes up the entire northern boundary of the Township, aside from a few access points at the end of county roads, the Bay is largely inaccessible due to the presence of the Quanicasee Wildlife Area. Additionally, the bay itself is very shallow, which limits commercial and industrial use potential. The exception is the Consumers Energy site that sits at the mouth of the Saginaw River and has a navigable port. The only other parcels in the Township that have direct access to the Saginaw River are occupied by the US Coast Guard Station and the Saginaw Bay Yacht Club along the Consumers access road.

### Rail

Rail is currently confined to the extreme western part of the Township and is inaccessible as it is located on private property. Additionally, the rail corridor into and out of the Township runs along heavily populated areas. There are several crossings in these areas and the speed of the rails are closely regulated. The Consumers Energy site is likely the only site in the Township actively served by rail.

## ZONING

A vast majority of the Township is zoned Agricultural or Residential. The area near the Consumers facility (Zoned I-2, Heavy Industrial District and B-3, Heavy Commercial District), the commercial along Center Avenue (M-25) and near Meijer along Pine Road (Zoned B-2, Agricultural/Business Transitional District and B-1, General Business), and an area bounded by Burns Road, Finn Road, Ridge Road, and Nebobish (Zoned I-1, Planned Enterprise District) are exceptions to this. It should be noted that a large share of commercially and industrially zoned land is owned by Consumers, leaving relatively few commercial/industrial sites that are owned by other entities and available for development.

Future Land Use described in the Township's Master Plan and the Future Land Use Map is largely consistent with existing Zoning. If any rezoning is to be considered to allow for additional commercial or industrial development outside of those properties that are currently zoned to accommodate these types of uses, the rezoning should consider the Township's Master Plan and a balance between further development and the Township's current character and identity.

Detailed infrastructure and zoning information specific to the five study sites is included in the Site Intelligence Reports. Please refer to Chapter 4 and Appendix C.

## 2.5 | OUR IDEAS FOR THE FUTURE

A crucial component of the Economic Development and Resiliency Strategy development process included a community survey that was developed in conjunction with the Hampton Township Economic Recovery and Development Strategy Steering Committee. The survey was posted online (in addition to being available in hard copy upon request), advertised through multiple online platforms, and 3,000 postcards were sent out to Hampton Township addresses in an effort to gain robust feedback and participation.

The community survey was developed in order to compile feedback from the local community and get input to inform future economic development strategies pursued by Hampton Township. The following includes key findings from the community survey:

- ◆ A total of approximately 630 responses were collected and analyzed as part of the Hampton Township Community Survey.
- ◆ 91% of those responding to the survey live in Hampton Township.
- ◆ Approximately 70% of respondents are above the age of 45.

### Industry & Economic Development

- ◆ Respondents believe attracting and retaining new businesses are the greatest factors that pose challenges to the future of Hampton Township's economy.
- ◆ On a scale of 1 to 10, approximately 85% of respondents gave a 7 or above when giving feedback how development should be prioritized by the Township as a means of advancing the future economy, especially if it does not significantly impact the current character of the Hampton Township community.
- ◆ The industries that respondents believe have the highest potential for future economic growth in Hampton Township include Agricultural Production (53%), Manufacturing (49%), and Health Care and Social Services (46%).
- ◆ Many of the respondents cited economic challenges related to the Consumers Energy Plant closure, restrictions and opposition to change from the Planning Board, and an inability to attract and retain new businesses and young people as the top challenges to future economic growth in the Township.

### Retail

- ◆ Over half of respondents indicated that they believe that retail options such as full service restaurants (68%) and building materials/supply stores (51%) are most needed in Hampton Township.

### Housing

- ◆ Respondents believe that the 25-44 age group is the cohort most in need of additional housing options in Hampton Township. In addition, respondents believe the Township is most in need of additional single-family homes, followed by for-sale townhomes/condos.

### Geographic Areas and Assets

- ◆ Many respondents commented that they believe that the Hampton Mall is a key economic asset that should be leveraged in the future.
- ◆ Many respondents commented that Center Avenue and the M-25 corridor may be specific areas that could be utilized for future development initiatives.

- ◆ Many respondents value Hampton Township’s waterfront as a key asset that they believe has the potential to be leveraged for future economic activity as long as it doesn’t compromise the integrity of the Township’s parks, trails, open spaces, and nature reserves.
- ◆ Many respondents believe that existing vacant buildings are some of the greatest assets that should be leveraged in any future economic development initiatives.
- ◆ Many respondents view Hampton Township’s community feel and assets (schools, safety organizations, residents, etc.) as being one of its greatest strengths that could be leveraged in future economic development initiatives.

Detailed survey response results can be found in Appendix A: Community Survey Results.



# 3 | OPPORTUNITY TARGET INDUSTRIES

A target industry analysis was performed focusing on specific industries that were identified as having the strongest potential for expansion and/or development in Hampton Township. These target industries were selected based on insights from the baseline economic analysis (see Appendix B), coupled with stakeholder feedback from the Steering Committee and additional interviews with various industry stakeholders in the community and region.

The industry profiles included in the target industry analysis include findings that outline national industry trends, trends specific to the Hampton Township region, typical industry development and site need, and industry and occupations data. Findings were identified through a combination of targeted industry research, interviews with local and regional industry stakeholders and organizations, and targeted regional and national business intelligence calls to businesses in the subject industries.

As summarized in the industry profiles to follow, data from our initial analysis and feedback from addition project stakeholder discussions suggests that Hampton Township may host a competitive advantage for businesses in these industries, and they may present opportunities for future business attraction or expansion efforts performed by Hampton Township. The industries outlined in this section include:

## 1. Food Processing

## 2. Manufacturing

- ◆ Chemical and Plastics
- ◆ Primary and Fabricated Metal
- ◆ Machinery, Electrical, and Transportation Equipment
- ◆ Wood and Paper

## 3. Alternative Energy Production

- ◆ Solar Energy
- ◆ Wind Energy

## 4. Senior Housing and Care

## 5. Healthcare, Social Services, and Government

- ◆ Medical Office Space Users
- ◆ Traditional Office Space Users

## 6. Retail, Recreation, Entertainment, and Dining



## 3.1 | FOOD PROCESSING



Though also a subsector of manufacturing, Food and Beverage processing is highlighted separately from the broader manufacturing target industries outlined later on in this analysis due to its high potential for development in Hampton Township based on the supporting economic and market findings listed below.

Industries in the **Food Manufacturing** subsector (NAICS 311) transform livestock and agricultural products into products for intermediate or final consumption. The industry groups are distinguished by the raw materials (generally of animal or vegetable origin) processed into food products<sup>4</sup>.

Industries in the **Beverage Manufacturing** subsector (NAICS 312) manufacture beverages for consumption. The industry group generally includes three types of establishments: (1) those that manufacture nonalcoholic beverages; (2) those that manufacture alcoholic beverages through the fermentation process; and (3) those that produce distilled alcoholic beverages<sup>5</sup>.

Key external drivers in the food and beverage manufacturing industries include demand from supermarkets and grocery stores, innovation in frozen food packaging, demand from food and beverage wholesalers, demand from restaurants, and consumer's per capita disposable income<sup>6</sup>. This includes local, regional, national, and global demand depending on the specific product.

### Key Findings

There are existing agricultural assets in Hampton Township and Bay County with the potential for increased processing of locally grown crops. These assets include everything from existing land being utilized for crop production of commodities like corn, soybean, vegetables, sugar beets, and wheat; to milk and cattle-based operations; to the existing presence of agriculture dependent companies such as Michigan Sugar Company.

<sup>4</sup> Bureau of Labor Statistics (BLS)

<sup>5</sup> Bureau of Labor Statistics (BLS)

<sup>6</sup> IBISWorld

Agriculture is part of Hampton Township’s identity in the region, and the township has historically identified with its agrarian heritage. This perception and identification may lead and to larger buy-in from businesses and members of the community if future food production industry development does occur.

Bay County has a significant industry concentration<sup>7</sup> in both food and beverage manufacturing, indicating a specialization in the county compared to regional and national trends.

The Food Processing target industry has seen strong job growth in the county, region, and state in recent years. This growth was driven by the Beverage Manufacturing industry which realized 40% or greater job growth from 2014-2019 in the county, CSA, and state; while the food manufacturing industry realized over 15% growth.

Average earnings<sup>8</sup> in the Food Processing target industry in Bay County are slightly higher than those in the CSA.

Overall, 284 of the 365 jobs added to the CSA in the Food Production target industry were in Bay County, equating to 77% of total job growth.

Of the top five national occupations within the Food Processing target industry, Laborers and Material Movers have the largest presence in the CSA, followed by Packaging and Filling Machine Operators. Packaging and Filling Machine Operators also had the highest concentration of any occupation in the CSA.

The target industry job trend table contains aggregated economic and job data from the Food Manufacturing (NAICS 311) and Beverage Manufacturing (312) industries; while the occupation table contains economic and job data for the top five national occupations in the aggregated industry set.

**Table 1**

<b>Food Processing Industry Job Trends, Regional Comparison (2014-2019)</b>					
	2019 Jobs	Job Change (2014-2019)	% Job Change (2014-2019)	Location Quotient	Average Earnings
<b>Bay County</b>	1,160	284	32%	2.3	\$57,283
<b>Bay-Saginaw-Midland CSA</b>	1,720	365	27%	0.8	\$56,759
<b>Michigan</b>	47,639	7,642	19%	0.9	\$61,191
<b>United States</b>	1,945,569	220,199	13%	1.0	\$61,081

<sup>7</sup> Location quotient (LQ) quantifies how concentrated a particular industry, cluster, occupation, or demographic group is in a region as compared to the nation. It can reveal what makes a particular region “unique” in comparison to the national average. An LQ of greater than 1.0 indicates the industry has a significant concentrated in an area compared to the national average. The LQ in the industry table includes the average of the aggregated industry set included in each target industry.

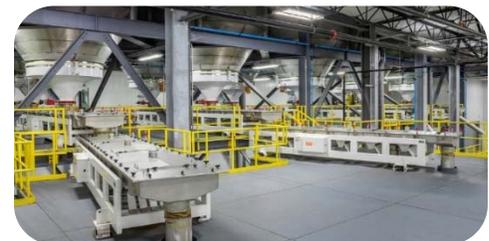
<sup>8</sup> Average annual earnings of regional industry (includes wages, salaries, profits, benefits, and other compensation).

Table 2

Top 5 Occupations, Food Processing Target Industry (2019)					
SOC <sup>9</sup>	Occupation Title	2019 Jobs (Bay-Saginaw- Midland CSA)	Location Quotient (Bay-Saginaw- Midland CSA)	Median Hourly Earnings (Bay-Saginaw- Midland CSA)	Median Hourly Earnings (United States)
51-3090	Food Processing Workers	274	0.9	\$15.30	\$13.93
51-3020	Butchers & Other Meat, Poultry, and Fish Processing Workers	205	0.5	\$12.72	\$13.66
51-7060	Laborers and Material Movers	3,142	0.7	\$12.14	\$13.08
51-9110	Packaging and Filling Machine Operators	900	2.2	\$15.61	\$14.05
51-9190	Misc. Production Workers	831	0.9	\$13.14	\$14.54

### Typical Site and Space Needs

- ◆ Large, flat sites
- ◆ 100,000+ SF buildings
- ◆ Access to clean water for processing and robust waste water infrastructure
- ◆ Key locational considerations by establishments in the industry include:
  - Low-cost operating environment
  - Availability of existing facilities
  - Financial incentives
  - Existing transportation and utility infrastructure
  - Labor availability
  - Density of livestock
  - Access to heavy utility Infrastructure (electric, gas, water, wastewater)
- ◆ Manufacturing or flex space general requirements
  - High ceilings
  - Truck bays, loading docks and driveways
  - Floors support heavy loads
  - Integrated office space
  - Co-located with distribution or warehouse space



<sup>9</sup> The Standard Occupational Classification (SOC) system is used by Federal statistical agencies to classify workers into occupational categories for the purpose of collecting, calculating, or disseminating data. All workers are classified into one of about 775 detailed occupations according to their occupational definition.

## 3.2 | MANUFACTURING



The **Manufacturing** industry (NAICS 31-33) is comprised of establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products. Establishments in the Manufacturing sector are often described as plants, factories, or mills and characteristically use power-driven machines and materials-handling equipment.

Key external drivers for the manufacturing industry include the value of the US dollar, commodity prices of materials commonly use in manufacturing (metals, chemicals, plastics, etc.), and export demand for finished goods and raw materials.

### Key Findings

The Manufacturing industry has a significant concentration in the county, CSA, and state. Total jobs in the manufacturing industry have increased in recent years in county, CSA, state, and nation. Bay County saw 15% total to growth in the Manufacturing industry from 2014 to 2019. Average earnings in manufacturing industry jobs in the CSA were approximately 10% higher than national averages.

The Manufacturing industry is currently underrepresented in Hampton Township from a total jobs and overall industry concentration standpoint, potentially indicating an opportunity to attract new businesses by leveraging the industry presence in the region.

Of the top five national occupations within the Manufacturing target industry, Laborers and Material Movers have the largest job presence in the CSA, followed by Miscellaneous Assemblers and Fabricators. Miscellaneous Assemblers and Fabricators also had the most significant concentration of any occupation in the CSA.

The target industry job trend table contains aggregated economic and job data for all Manufacturing industries (NAICS 31-33) while the occupation table contains economic and job data for the top five national occupations in the aggregated industry set.

Table 3

<b>Manufacturing Industry Job Trends, Regional Comparison (2014-2019)</b>					
	2019 Jobs	Job Change (2014-2019)	% Job Change (2014-2019)	Location Quotient	Average Earnings
<b>Bay County</b>	4,649	611	15%	1.6	\$78,639
<b>Bay-Saginaw-Midland CSA</b>	23,593	1,580	7%	1.8	\$94,068
<b>Michigan</b>	636,972	52,098	9%	1.7	\$84,148
<b>United States</b>	13,044,988	630,378	5%	1.0	\$85,858

Table 4

<b>Top 5 Occupations, Manufacturing Target Industry (2019)</b>					
SOC	Occupation Title	2019 Jobs (Bay-Saginaw-Midland CSA)	Location Quotient (Bay-Saginaw-Midland CSA)	Median Hourly Earnings (Bay-Saginaw-Midland CSA)	Median Hourly Earnings (United States)
51-2090	<b>Misc. Assemblers and Fabricators</b>	2,993	2.1	\$17.96	\$15.17
51-7060	<b>Laborers and Material Movers</b>	3,142	0.7	\$12.14	\$13.08
51-9190	<b>Misc Production Workers</b>	831	0.9	\$13.14	\$14.54
51-1010	<b>First Line Supervisors of Production and Operating Workers</b>	1,034	1.6	\$25.99	\$28.92
51-9060	<b>Inspectors, Testers, Sorters, Samplers, and Weighers</b>	470	0.8	\$18.58	\$18.43

**Typical Site and Space Needs**

- ◆ Large, flat sites (40,000 to 100,000+ SF)
- ◆ Access to transportation infrastructure (road/highway, rail, water, air)
- ◆ Utility Infrastructure availability (electric, gas, water, wastewater, telecom)
- ◆ High ceilings and floors supporting heavy loads
- ◆ Truck bays, loading docks and driveways
- ◆ Integrated office space
- ◆ Co-located with distribution or warehouse space

### 3.2.1 CHEMICAL AND PLASTICS MANUFACTURING

The **Chemical Manufacturing** (NAICS 325) industry is based on the transformation of organic and inorganic raw materials by a chemical process and the formulation of products. Chemical manufacturers rely heavily on demand from the manufacturing sector, especially from automotive and appliance industries. Industry manufacturers make intermediate products used as raw materials in final downstream products. Any downward shift in production in key buying manufacturing markets, primarily automotive parts manufacturers, photographic chemicals manufacturers and appliance parts producers negatively affects demand for industry products<sup>10</sup>.



Establishments in the **Plastics and Rubber Products Manufacturing** (NAICS 326) industry primarily make goods by processing plastics materials and raw rubber. The core technology employed by establishments in this subsector is that of plastics or rubber product production. Plastics and rubber are combined in the same subsector because plastics are increasingly being used as a substitute for rubber. Plastic's versatility and ease of manufacturing have made it an essential material for industrial production. While plastic has penetrated almost every aspect of American life and new applications for it are continuously being discovered, its indispensability does not make it immune to changes in broad economic trends. The industry's dependence on consumer spending habits makes it sensitive to overall economic trends, particularly in the markets that purchase miscellaneous plastic products. The automotive sector constitutes nearly a quarter of plastic products manufacturers' demand, meaning that a reduction in demand for cars also decreases the need for plastic used in automobiles<sup>11</sup>.



Key growth drivers in the Chemical and Plastics Manufacturing target industry include an expanding customer base, increased ecommerce, transportation efficiencies, growth in the healthcare industry, and product innovation; while emerging opportunities in the target industry are centered around the craft brew labels, hand sanitizer labels, food packaging, single use medical device packaging, and innovation in orthopedics.

#### Key Findings

Jobs in the Chemical and Plastics Manufacturing target industry grew by 14% in Bay County from 2014 to 2019. Much of the job gain in the CSA can be attributed to job growth in Bay County. The Chemical and Plastics Manufacturing target industry has a significant concentration in the county, CSA, and state.

The Plastics and Rubber Products Manufacturing industry saw 10% or greater job growth from 2014 to 2019 in the county, CSA, and state. Bay County saw the highest job growth at 15%.

The Chemical Manufacturing industry saw 15% job growth in Bay County from 2014 to 2019, and had a significant concentration in the county, CSA, and state. The largest was in the CSA (5.4LQ).

<sup>10</sup> IBISWorld, Bureau of Labor Statistics (BLS)

<sup>11</sup> IBISWorld, Bureau of Labor Statistics (BLS)

Average earnings in the chemical and plastics manufacturing industry in Bay County and the CSA are higher than those seen at the national and state levels. Average earnings in the county are almost 10% higher than the national average, and average earnings in the CSA are almost 30% higher.

Of the top five national occupations within the Chemical and Plastics Manufacturing target industry, Laborers and Material Movers have the largest job presence in the CSA, followed by Miscellaneous Assemblers and Fabricators. Miscellaneous Assemblers and Fabricators also had the highest concentration of any occupation in the CSA.

The target industry job trend table contains aggregated economic and job data for the Chemical Manufacturing (NAICS 325) and Plastics and Rubber Products Manufacturing (NAICS 326) industries, while the occupation table contains economic and job data for the top five national occupations in the aggregated industry set.

Table 5

<b>Chemical &amp; Plastics Manufacturing Target Industry Job Trends, Regional Comparison (2014-2019)</b>					
	2019 Jobs	Job Change (2014-2019)	% Job Change (2014-2019)	Location Quotient	Average Earnings
<b>Bay County</b>	832	104	14%	2.4	\$108,086
<b>Bay-Saginaw-Midland CSA</b>	6,049	111	2%	3.6	\$130,422
<b>Michigan</b>	74,192	5,610	8%	1.6	\$87,722
<b>United States</b>	1,590,411	105,829	7%	1.0	\$99,025

Table 6

<b>Top 5 Occupations, Chemical &amp; Plastics Manufacturing Target Industry (2019)</b>					
SOC	Occupation Title	2019 Jobs (Bay-Saginaw-Midland CSA)	Location Quotient (Bay-Saginaw-Midland CSA)	Median Hourly Earnings (Bay-Saginaw-Midland CSA)	Median Hourly Earnings (United States)
<b>51-9010</b>	<b>Chemical Processing Machine Setters, Operators, and Tenders</b>	489	3.5	\$39.63	\$21.86
<b>51-4070</b>	<b>Molders and Molding Machine Setters, Operators, and Tenders, Metal and Plastic</b>	676	3.6	\$13.59	\$15.30
<b>51-2090</b>	<b>Misc. Assemblers and Fabricators</b>	2,993	2.1	\$17.96	\$15.17

<b>53-7060</b>	<b>Laborers and Material Movers</b>	3,142	0.7	\$12.14	\$13.08
<b>51-1010</b>	<b>First Line Supervisors of Production and Operating Workers</b>	1,034	1.6	\$25.99	\$28.92

**Typical Site and Space Needs**

- ◆ 30,000 to 100,000 SF
- ◆ Access to transportation infrastructure (road/highway, rail, water, air)
- ◆ Utility Infrastructure availability (electric, gas, water, wastewater, telecom)
- ◆ Key locational factors by establishments in the industry include:
  - The region’s proximity to customers
  - Competitive labor availability and cost
  - Real estate costs and taxes
  - Third party logistics availability
  - Energy costs

**3.2.2 METAL MANUFACTURING**

Industries in the **Primary Metal Manufacturing** (NAICS 331) subsector smelt and/or refine metals from ore and scrap using various techniques. Establishments in this subsector also manufacture metal alloys and superalloys by introducing other chemical elements to pure metals. The output of smelting and refining, is used in rolling, drawing, and extruding operations to make sheet, strip, bar, rod, or wire, and in molten form to make castings and other basic metal products.

Industries in the **Fabricated Metal Product Manufacturing** (NAICS 332) subsector transform metal into intermediate or end products, or treat metals and metal formed products fabricated elsewhere. Important fabricated metal processes are forging, stamping, bending, forming, and machining, used to shape individual pieces of metal; and other processes, such as welding and assembling, used to join separate parts together.

Key growth drivers in the Metal Manufacturing target industry include the reshoring of manufacturing activity from overseas, commodity prices of metals, automation and labor availability, and demand for finished products and goods. Emerging opportunities can be seen in the stamping, robotics, and automotive industries; in addition to opportunities driven by the onshoring of key industry supply chains.



**Key Findings**

The Metal Manufacturing target industry has the highest job concentration in Bay County.

The Primary Metal Manufacturing industry showed significant concentration in the county, CSA, and State.

The Primary Metal Manufacturing industry saw 40% total job growth in Bay County from 2014-2019.

The Fabricated Metal Product Manufacturing industry has a significant concentration in the county, CSA, and state.

Of the top five national occupations within the Metals Manufacturing target industry, Miscellaneous Assemblers and Fabricators have the largest job presence in the CSA, followed by Fabricators. Machine Tool Cutting Setters, Operators, and Tenders, Metals and Plastic had the highest concentration of any occupation in the CSA.

The target industry job trend table contains aggregated economic and job data for the Primary Metal Manufacturing (NAICS 331) and Fabricated Metal Product Manufacturing (NAICS 332) industries, while the occupation table contains economic and job data for the top five national occupations in the aggregated industry set.

Table 7

<b>Metal Manufacturing Target Industry Job Trends, Regional Comparison (2014-2019)</b>					
	2019 Jobs	Job Change (2014-2019)	% Job Change (2014-2019)	Location Quotient	Average Earnings
<b>Bay County</b>	565	54	11%	4.6	\$72,949
<b>Bay-Saginaw-Midland CSA</b>	3,095	-41	-1%	1.4	\$76,616
<b>Michigan</b>	103,807	1,103	1%	1.9	\$73,878
<b>United States</b>	1,899,197	25,450	1%	1.0	\$74,403

Table 8

<b>Top 5 Occupations, Metal Manufacturing Target Industry (2019)</b>					
SOC	Occupation Title	2019 Jobs (Bay-Saginaw-Midland CSA)	Location Quotient (Bay-Saginaw-Midland CSA)	Median Hourly Earnings (Bay-Saginaw-Midland CSA)	Median Hourly Earnings (United States)
51-4030	<b>Machine Tool Cutting Setters, Operators, and Tenders, Metal and Plastic</b>	1,076	3.1	\$16.67	\$17.10
51-4040	<b>Machinists</b>	1,094	2.7	\$19.40	\$20.93
51-4120	<b>Welding, Soldering, and Brazing Workers</b>	430	0.9	\$15.75	\$19.66
51-2090	<b>Miscellaneous Assemblers and Fabricators</b>	2,993	2.1	\$17.96	\$15.17
51-1010	<b>First Line Supervisors of Production and Operating Workers</b>	1,034	1.6	\$25.99	\$28.92

### Typical Site and Space Needs

- ◆ 10,000 to 100,000+ SF
- ◆ Access to transportation infrastructure (road/highway, rail, water, air)
- ◆ Utility Infrastructure availability (electric, gas, water, wastewater, telecom)
- ◆ Key locational factors by establishments in the industry include:
  - Proximity to customer base
  - Competitive labor availability and cost
  - Real estate costs and taxes
  - Quality of life
  - Proximity to auto industry
  - Third party logistics availability
  - Energy costs

## 3.2.3 MACHINERY, ELECTRICAL, AND TRANSPORTATION EQUIPMENT MANUFACTURING

Industries in the **Machinery Manufacturing** (NAICS 333) subsector create end products that apply mechanical force, for example, the application of gears and levers, to perform work. Some important processes for the manufacture of machinery are forging, stamping, bending, forming, and machining that are used to shape individual pieces of metal. Processes, such as welding and assembling are used to join separate parts together. Although these processes are similar to those used in metal fabricating establishments, machinery manufacturing is different because it typically employs multiple metal forming processes in manufacturing the various parts of the machine. Moreover, complex assembly operations are an inherent part of the production process.



Industries in the **Electrical Equipment, Appliance, and Component Manufacturing** (NAICS 335) subsector manufacture products that generate, distribute and use electrical power. The Electrical Equipment Manufacturing industry manufactures power, distribution and specialty transformers; electric motors, generators and motor-generator sets; switchgear and switchboard apparatus; relays; and industrial controls. Overall, the industry supplies a variety of downstream markets, including utilities providers and manufacturers of consumer goods. As a result, industry performance is largely influenced by both industrial drivers and consumer spending. Household Appliance Manufacturing establishments make both small and major electrical appliances and parts. Other Electrical Equipment and Component Manufacturing establishments make devices for storing electrical power (e.g., batteries), for transmitting electricity (e.g., insulated wire), and wiring devices (e.g., electrical , fuse boxes, and light switches).

Industries in the **Transportation Equipment Manufacturing** (NAICS 336) subsector produce equipment for transporting people and goods. Transportation equipment is a type of machinery. Establishments in this subsector utilize production processes similar to those of other machinery manufacturing establishments - bending, forming, welding, machining, and assembling metal or plastic parts into components and finished products. However, the

assembly of components and subassemblies and their further assembly into finished vehicles tends to be a more common production process in this subsector<sup>12</sup>.

Key growth drivers in the Machinery, Transportation, and Electrical Component Manufacturing target industry include the overall health of the economy, the adaptation of lithium batteries, and innovation and growth in health care industries. Emerging opportunities include manufacturing and logistics for food and beverage products, lithium battery production, energy storage, water purification, innovation in the health care industry, automation and robotics, reuse of recyclable materials, and electrochemical innovations.

### Key Findings

Jobs in the Machinery, Electrical, and Transportation Equipment Manufacturing target industry grew by 15% in Bay County from 2014 to 2019.

The Machinery, Electrical, and Transportation Equipment Manufacturing target industry has a significant job concentration in the County, CSA, and state.

The Electrical Equipment, Appliance, and Component Manufacturing industry realized 25% or greater job growth from 2014 to 2019 and showed significant concentration in the county, CSA, and state.

The Transportation Equipment Manufacturing industry saw 9% or higher total job growth from 2014 to 2019 and had a significant job concentration in the county, CSA, and state.

The Machinery Manufacturing industry saw overall job growth of 9% from 2014 to 2019 in Bay County, and had a significant job concentration in the county, CSA, and state.

Of the top five national occupations within the Machinery, Electrical, and Transportation Equipment Manufacturing target industry, Miscellaneous Assemblers and Fabricators have the largest job presence in the CSA, followed by Machinists.

The target industry job trend table contains aggregated economic and job data for the Machinery Manufacturing (NAICS 333); Electrical Equipment, Appliance, and Component Manufacturing (NAICS 335); and Transportation Equipment Manufacturing (NAICS 336) industries, while the occupation table contains economic and job data for the top five national occupations in the aggregated industry set.

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<sup>12</sup> IBISWorld, Bureau of Labor Statistics (BLS)

Table 9

<b>Machinery, Electrical, and Transportation Equipment Manufacturing Target Industry Job Trends, Regional Comparison (2014-2019)</b>					
	2019 Jobs	Job Change (2014-2019)	% Job Change (2014-2019)	Location Quotient	Average Earnings
<b>Bay County</b>	1,407	187	15%	2.0	\$89,276
<b>Bay-Saginaw-Midland CSA</b>	8,770	920	12%	2.2	\$88,713
<b>Michigan</b>	281,533	22,706	9%	2.4	\$92,045
<b>United States</b>	3,286,135	201,576	7%	1.0	\$93,288

Table 10

<b>Top 5 Occupations, Machinery, Electrical, and Transportation Equipment Manufacturing Target Industry (2019)</b>					
SOC	Occupation Title	2019 Jobs (Bay-Saginaw-Midland CSA)	Location Quotient (Bay-Saginaw-Midland CSA)	Median Hourly Earnings (Bay-Saginaw-Midland CSA)	Median Hourly Earnings (United States)
51-2090	Miscellaneous Assemblers and Fabricators	2,993	2.1	\$17.96	\$15.17
51-4120	Welding, Soldering, and Brazing Workers	430	0.9	\$15.75	\$19.66
51-4040	Machinists	1,094	2.7	\$19.40	\$20.93
51-2020	Electrical, Electronics, and Electromechanical Assemblers	659	2.1	\$14.43	\$19.66
51-1010	First Line Supervisors of Production and Operating Workers	1,034	1.6	\$25.99	\$28.92

**Typical Site and Space Needs**

- ◆ 40,000 to 100,000 SF
- ◆ Access to transportation infrastructure (road/highway, rail, air)
- ◆ Utility Infrastructure availability (electric, gas, water, wastewater, telecom)

- ◆ Key locational factors by establishments in the industry include:
  - Proximity to customer base
  - Competitive labor availability and cost
  - Real estate costs and taxes
  - Proximity to raw materials used in production
  - Third party logistics availability
  - Energy costs

### 3.2.4 WOOD AND PAPER MANUFACTURING

Industries in the **Wood Product Manufacturing** (NAICS 321) subsector manufacture wood products, such as lumber, plywood, wood containers, wood flooring, wood trusses, manufactured homes (i.e., mobile homes), and prefabricated wood buildings. The production processes of the Wood Product Manufacturing subsector include sawing, planning, shaping, laminating, and assembling of wood products starting from logs that are cut into lumber that then may be further cut, or shaped by lathes or other shaping tools. The lumber or other transformed wood shapes may also be subsequently planed or smoothed, and assembled into finished products, such as wood containers. The Wood Product Manufacturing subsector includes establishments that make wood products from logs and lumber that are sawed and shaped, and establishments that purchase sawed lumber and make wood products. With the exception of sawmills and wood preservation establishments, the establishments are grouped into industries mainly based on the specific products manufactured. Demand for industry products is primarily driven by activity in the construction sector, its largest source of demand. However, industry demand is also affected by household spending levels<sup>13</sup>.



Industries in the **Paper Manufacturing** (NAICS 322) subsector make pulp, paper, or converted paper products. There are three essential activities involved in the paper manufacturing process, including: (1) the manufacturing of pulp which involves separating the cellulose fibers from other impurities in wood or used paper; (2) The manufacturing of paper which involves matting fibers into sheets; (3) the conversion of paper products that are made from paper and other materials by various cutting and shaping techniques. In recent years,, the industry has grappled with negative publicity surrounding the environmental risks of using disposable paper products, prompting consumers to switch to sustainable containers and packaging over industry items. Furthermore, rising competition from low-priced imports has added to the industry's decline<sup>14</sup>.



Industries in the **Paper Manufacturing** (NAICS 322) subsector make pulp, paper, or converted paper products. There are three essential activities involved in the paper manufacturing process, including: (1) the manufacturing of pulp which involves separating the cellulose fibers from other impurities in wood or used paper; (2) The manufacturing of paper which involves matting fibers into sheets; (3) the conversion of paper products that are made from paper and other materials by various cutting and shaping techniques. In recent years,, the industry has grappled with negative publicity surrounding the environmental risks of using disposable paper products, prompting consumers to switch to sustainable containers and packaging over industry items. Furthermore, rising competition from low-priced imports has added to the industry's decline<sup>14</sup>.

#### Key Findings

The Wood and Paper Manufacturing target industry saw 30% total job growth in Bay County, and 39% job growth in the CSA from 2014 to 2019.

<sup>13</sup> IBISWorld, Bureau of Labor Statistics (BLS)

<sup>14</sup> IBISWorld, Bureau of Labor Statistics (BLS)

The Wood Product Manufacturing industry realized total job growth in Bay County, the CSA, State of Michigan, and U.S from 2014-2019 (including 29% growth in Bay County) and also showed significant concentration in Bay County.

The Paper Manufacturing industry realized over 10% total job growth from 2014 to 2019 (including 42% growth in Bay County and 100% growth in the CSA).

Of the top five national occupations within the Machinery, Electrical, and Transportation Equipment Manufacturing target industry, Laborers and Material Movers have the largest job presence in the CSA, followed by Miscellaneous Assemblers and Fabricators.

The target industry job trend table contains aggregated economic and job data for the Wood Product Manufacturing (NAICS 321) and Paper Manufacturing (NAICS 322) industries, while the occupation table contains economic and job data for the top five national occupations in the aggregated industry set.

Table 11

<b>Wood &amp; Paper Manufacturing Target Industry Job Trends, Regional Comparison (2014-2019)</b>					
	2019 Jobs	Job Change (2014-2019)	% Job Change (2014-2019)	Location Quotient	Average Earnings
<b>Bay County</b>	161	37	30%	0.8	\$63,885
<b>Bay-Saginaw-Midland CSA</b>	337	94	39%	0.8	\$68,925
<b>Michigan</b>	23,593	2,107	10%	1.0	\$70,699
<b>United States</b>	797,909	33,275	4%	1.0	\$69,044

Table 12

<b>Top 5 Occupations, Wood &amp; Paper Manufacturing Target Industry (2019)</b>					
SOC	Occupation Title	2019 Jobs (Bay-Saginaw- Midland CSA)	Location Quotient (Bay-Saginaw- Midland CSA)	Median Hourly Earnings (Bay-Saginaw- Midland CSA)	Median Hourly Earnings (United States)
51-9190	Misc. Production Workers	831	0.9	\$13.14	\$14.54
51-7040	Woodworking Machine Setters, Operators, and Tenders	29	0.2	\$14.41	\$14.22
53-7060	Laborers and Material Movers	3,142	0.7	\$12.14	\$13.08
51-2090	Miscellaneous Assemblers and Fabricators	2,993	2.1	\$17.96	\$15.17
51-1010	First Line Supervisors of Production and Operating Workers	1,034	1.6	\$25.99	\$28.92

### Typical Site and Space Needs

- ◆ 10,000 to 100,000+ SF
- ◆ Access to transportation infrastructure (road/highway, rail, air)
- ◆ Utility Infrastructure availability (electric, gas, water, wastewater, telecom)
- ◆ Key locational factors by establishments in the industry include:
  - Proximity to customer base
  - Proximity to large metro areas
  - Proximity to raw materials (hardwood)
  - Competitive labor availability
  - Power and rail availability
  - Proximity to raw materials used in production

### 3.3 | ALTERNATIVE ENERGY PRODUCTION (SOLAR & WIND)

Operators in the **Solar Electric Power Generation** (NAICS 221114) industry own and operate solar-power-generating facilities in the form of either photovoltaic panels or solar thermal power stations that make use of mirrors or lenses to concentrate the sun's energy. This industry covers utility-scale solar and does not include distributed energy. The major markets in the Solar Power industry are utilities, commercial customers and industrial customers. Utilities buy solar energy from solar producers or generate solar power themselves to retail electricity to their end customers. Industrial and commercial consumers typically generate electricity on-site, or buy large amounts of energy from a utility or independent power producer. Operators in this industry provide downstream customers with a power purchasing agreement (PPA), which enables the operators to provide electricity to an end user under specific terms.



Solar-power generators will benefit from favorable market conditions over the next five years, strengthened by an ongoing focus on green energy and increasing energy consumption rates nationally and in the State of Michigan. Solar power capacity and output will likely continue expanding strongly in the future as the State of Michigan looks to transition from generating a majority of its electricity from coal, and as the cost of implementing solar continues to decrease due to the rapid development of new technologies<sup>15</sup>.

Operators in the **Wind Electric Power Generation** (NAICS 221115) industry operate wind farms, which consist of wind-operated turbines that are used to generate electricity. The wind power industry generates revenue from owning and operating wind farms (both on-and-offshore) and selling the produced energy to downstream customers. Over the last five years, government assistance has made this energy source more cost-competitive with other electricity generation sources, with net generation from wind continuing to increase.

Companies in the Wind Power industry are expected to experience generally favorable market conditions over the next five years, buoyed by solid growth in demand for electricity and an ongoing focus on green energy. In addition, while not mandated, the US Department of Energy released a report that cites the possibility of 20% of total US energy demand being fulfilled by wind power by 2030, indicating a potential boon to industry operators over the coming five years<sup>16</sup>.



Most of Michigan's renewable electricity generation comes from wind, which became the state's largest source of renewable energy used for electricity generation in 2013, when it surpassed hydropower and biomass for the first time. In 2018, wind energy generated almost 5% of the state's electricity (the most of any alternative energy source). Estimates of Michigan's potential generating capacity from wind have increased with improved turbine technologies and greater turbine heights. Michigan is among the top 15 states in the nation in terms of both wind capacity and wind generation. The state has about two dozen utility-scale wind farms with a total generating

<sup>15</sup> IBISWorld

<sup>16</sup> IBISWorld

capacity of more than 1,900 megawatts. Many of Michigan's wind farms are located between Saginaw Bay and Lake Huron<sup>17</sup> (including in counties adjacent to Bay County and Hampton Township). This is likely because these areas have some of the highest average annual windspeeds in the state according to the National Renewable Energy Laboratory, making the area the most suitable for wind energy generation in the state of Michigan.

Key external drivers in both in wind and solar energy industry include tax credits for energy efficiency, electric power consumption, the price of electric power, the commodity price of coal and steel, and the price of semiconductor and electronic components.

### Key Findings

Recent investments are being made in solar farms in the state of Michigan including a 1,000-acre project in eastern Calhoun County which will be completed in 2021. Most of the existing land of the project was being used to grow soybean and corn.

Hampton Township and Bay County have significant amounts of existing farm acreage, which can be ideal for solar development (large, flat, and uninhibited from sunshine).

Hampton Township is home to a variety of existing energy distribution infrastructure and assets and is currently known for and identifies with the power generation and utilities industry due to the large historical presence of Consumers Energy.

Hampton Township and Bay County are home to some of the highest annual average wind speeds in the state according to the National Renewable Energy Laboratory (NREL)<sup>18</sup>, indicating that it may be positioned for and have capacity for significant future wind energy development.

Delta College (located within Bay County) is one of only 10 higher education facilities in the state to offer a degree program focused in alternative energy/wind turbine technology. This program aims at providing educations to students who pursue occupations such as wind turbine service technicians, wind energy engineers, wind energy project managers, and wind energy operations managers to name a few.

In 2019, Phase III of Consumers Energy Cross Winds Energy Park in Tuscola County (adjacent to Bay County) went into commercial operation with the addition of 33 new wind turbines. Consumers Energy highlights the following as being economic benefits of the overall project<sup>19</sup>.

150 construction-related jobs and eight operating and maintenance jobs created by Phase I of the project.

More than \$100 million of the \$250 million project investment in Phase I was directed to Michigan-based vendors or suppliers.

Millions of dollars in new tax revenue will be generated throughout the life of the project.

Landowners will be paid millions of dollars collectively pursuant to their easements. These annual payments will be an additional income stream into the area over the life of the project.

Millions of dollars per year of economic impact to Tuscola County will be accounted for during the project's lifetime.

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<sup>17</sup> U.S Energy Information Administration

<sup>18</sup> <https://windexchange.energy.gov/maps-data/60>

<sup>19</sup> <https://www.consumersenergy.com/company/what-we-do/electric-generation/renewables/cross-winds>

While both Bay County and the CSA are underrepresented in terms of target industry jobs, education and infrastructure assets currently exist in the area and could be leveraged in the region for future industry development activities

Of the top five national occupations within the Alternative Energy Production target industry, General and Operations Managers have the largest job presence in the CSA, followed by Electricians. Electricians have the most significant job concentration in the CSA.

Jobs in the top five national occupations within the Alternative Energy Production target industry have higher median hourly earnings than those in other target industries.

The target industry job trend table contains aggregated economic and job data for the Solar Electric Power Generation (NAICS 221114) and Wind Electric Power Generation (221115) industries, while the occupation table contains economic and job data for the top five national occupations in the aggregated industry set.

**Table 13**

<b>Alternative Energy Production Target Industry Job Trends, Regional Comparison (2014-2019)</b>					
	2019 Jobs	Job Change (2014-2019)	% Job Change (2014-2019)	Location Quotient	Average Earnings
<b>Bay County</b>	-	-	0%	0.0	\$0
<b>Bay-Saginaw-Midland CSA</b>	-	-	0%	0.0	\$0
<b>Michigan</b>	36	16	80%	0.1	\$101,938
<b>United States</b>	553,659	3,923	1%	1.0	\$153,119

Table 14

<b>Top 5 Occupations, Alternative Energy Production Target Industry (2019)</b>					
SOC	Occupation Title	2019 Jobs (Bay-Saginaw-Midland CSA)	Location Quotient (Bay-Saginaw-Midland CSA)	Median Hourly Earnings (Bay-Saginaw-Midland CSA)	Median Hourly Earnings (United States)
49-9080	Wind Turbine Service Technicians	<10	0.15	N/A	\$25.35
47-2110	Electricians	940	1.20	\$24.69	\$26.11
17-2070	Electrical and Electronics Engineers	227	0.66	\$46.49	\$47.65
49-9050	Line Installers and Repairers	152	0.60	\$38.15	\$30.95
11-1020	General and Operations Managers	1,939	0.78	\$40.20	\$48.30

### Typical Site and Space Needs

#### Solar Electric Power Generation

- ◆ Potential solar capacity
- ◆ Cost of existing electric and existing/future electricity demand
- ◆ Proximity to electric utility grid infrastructure
- ◆ Permitting/zoning barriers
- ◆ Gradient and size of site (large flat sites are preferred).
- ◆ Proximity to assets that may shade solar arrays reducing energy potential (trees, buildings, etc.)
- ◆ Community support for projects.



#### Wind Electric Power Generation

- ◆ Potential wind capacity/speed
- ◆ Cost of existing electric and existing/future electricity demand
- ◆ Proximity to electric utility grid infrastructure
- ◆ Permitting/zoning barriers
- ◆ Access to major transportation infrastructure (highways, ports, rail, etc.)
- ◆ Community support for projects



## 3.4 | SENIOR HOUSING AND CARE



Industries in the **Nursing and Residential Care Facilities** (NAICS 623) subsector provide residential care combined with either nursing, supervisory, or other types of care as required by the residents. In this subsector, the facilities are a significant part of the production process and the care provided is a mix of health and social services with the health services being largely some level of nursing services.

A key driver of performance in this subsector is the number of adults aged 65 and older. The expanding number of seniors has been brought about by a larger population base compounded by longer life expectancy, made possible by numerous advancements in the medical field. Additionally, there have been medical developments that can treat or combat conditions that previously did not exist, further adding to these expenditures. As a result, growth in the number of individuals aged 65 and older is a significant demographic driver of demand. Trends in Hampton Township and the surrounding region point to their general correspondence with these broader national trends<sup>20</sup>.

Another key driver of performance is per capita disposable income. As household income rises, consumers are more likely to purchase insurance and can afford out-of-pocket expenses. In addition, households become better able to pay for their elderly family members' stay in nursing facilities. Consequently, a rise in disposable income can result in greater demand for industry services.

Operators in the Nursing Care Facilities industry provide short-stay patients and long-stay residents with a full range of services in addition to basic skilled nursing and custodial care. Facilities typically supply rooms, meals, social activities, personal care, 24-hour nursing supervision and access to medical services when needed. In addition, most nursing facilities offer interim medical care (after a hospital stay) and respite care (short-term relief for those who are caring for family members).

<sup>20</sup> IBISWorld

### Key Findings

The region has an aging population that will drive senior housing demand in the future.

There is increasing demand across continuum of care spectrum including demand for independent living, assisted living, and memory care services and residences. Bay County’s older senior population will continue to increase through 2040, as the large Baby Boom generation continues to age.

The Senior Housing and Care target industry has recently expanded in Hampton Township (e.g. New Hope Bay).

There has been increasing demand for general health care services in the region, reflected by historic job growth trends in the health care and social services industry in the region.

Of the top five national occupations within the Senior Housing and Care target industry, Building Cleaning workers have the largest job presence in the CSA, followed by Nursing, Psychiatric, and Home Health Aides. Registered Nurses has the most significant industry concentration in the CSA.

Table 15

Bay County Population Growth Projections 2020-2040					
Age Group	2020	2025	2030	2035	2040
Approaching Retirement (55-64)	15,664	13,687	11,891	11,086	10,796
Younger Seniors (65-74)	12,769	13,747	13,550	11,819	10,251
Middle Seniors (75-84)	6,636	7,958	9,114	9,832	9,610
Older Seniors (85+)	2,753	2,917	3,249	3,813	4,264
All Seniors (55+)	37,822	38,309	37,804	36,550	34,921
Total Population (0-85+)	102,600	100,187	97,860	94,759	90,999

Source: Michigan Department of Technology, Management, and Budget

Table 16

Bay County Population % Growth Projections, 2020-2040				
Age Group	2020 - 2025	2025-2030	2030-2035	2035-2040
Approaching Retirement (55-64)	-13%	-13%	-7%	-3%
Younger Seniors (65-74)	8%	-1%	-13%	-13%
Middle Seniors (75-84)	20%	15%	8%	-2%
Older Seniors (85+)	6%	11%	17%	12%
All Seniors (55+)	1%	-1%	-3%	-4%
Total Population (0-85+)	-2%	-2%	-3%	-4%

Source: Michigan Department of Technology, Management, and Budget

The target industry job trend table contains economic and job data for the Nursing and Residential Care Facilities (NAICS 623) industry, while the occupation table contains economic and job data for the top five national occupations in the Nursing and Residential Care Facilities industry.

Table 17

<b>Senior Housing and Care Industry Job Trends, Regional Comparison (2014-2019)</b>					
	2019 Jobs	Job Change (2014-2019)	% Job Change (2014-2019)	Location Quotient	Average Earnings
<b>Bay County</b>	1,175	-133	-10%	1.5	\$31,545
<b>Bay-Saginaw-Midland CSA</b>	4,099	-333	-8%	1.2	\$34,172
<b>Michigan</b>	106,745	1,751	2%	1.1	\$37,802
<b>United States</b>	3,382,555	100,358	3%	1.0	\$40,651

Table 18

<b>Top 5 Occupations, Senior Housing and Care Target Industry (2019)</b>					
SOC	Occupation Title	2019 Jobs (Bay-Saginaw-Midland CSA)	Location Quotient (Bay-Saginaw-Midland CSA)	Median Hourly Earnings (Bay-Saginaw-Midland CSA)	Median Hourly Earnings (United States)
<b>31-1010</b>	<b>Nursing, Psychiatric, and Home Health Aides</b>	4,394	1.73	\$12.52	\$12.92
<b>39-9020</b>	<b>Personal Care Aides</b>	2,653	1.02	\$10.81	\$11.53
<b>29-2060</b>	<b>Licensed Practical and Licensed Vocational Nurses</b>	889	1.17	\$22.01	\$22.19
<b>29-1140</b>	<b>Registered Nurses</b>	4,411	1.42	\$35.02	\$34.46
<b>37-2010</b>	<b>Building Cleaning Workers</b>	5,397	1.28	\$11.80	\$12.15

**Typical Site and Space Needs**

- ◆ Sites typically host continuum of care options onsite or nearby.
- ◆ Often co-located within or adjacent to other health care facilities.
- ◆ Typically located in immediate proximity to shopping, retail, and dining.

- ◆ Sites are often services by direct shuttles or are in proximity to public transportation.

## 3.5 | HEALTH CARE, SOCIAL SERVICES, AND GOVERNMENT



The health care, social services, and government sector is a primarily local-serving sector with additional potential for filling existing and new commercial space. For the purposes of analysis we divide these sectors into medical office space users and traditional office space users.

### 3.5.1 MEDICAL OFFICE SPACE USERS

Nationally there has been strong and growing demand for medical and healthcare related office space, driven by positive overall industry growth in the Healthcare and Social Services industry. The majority of services offered by subsectors in the industry, which includes hospitals, ambulatory healthcare services, outpatient care centers, nursing and social assistance services are driven by demographic changes due to an aging total population, and increasing total health expenditure. Broadly speaking, an aging US population and longer life expectancies brought about by advancements in the medical field fueled sector growth. Rising total health expenditure and federal funding for Medicare and Medicaid were the principal drivers of sector performance over the last decade<sup>21</sup>.

Trends in Hampton Township and the surrounding region point to their general correspondence with these broader national trends. For example, population projections by the State of Michigan point to the total population increasing in age in both Bay County and the Bay-Saginaw-Midland CSA over the coming decades, although only slightly.

In addition, the Health Care and Social Assistance Industry represented a significant percentage of total jobs in Bay County (17% or 6,300 jobs) and the Bay-Saginaw-Midland CSA (16% or 27,600 jobs) in 2019. The industry is anchored by a variety of local and regional institutions, with the largest being McLaren Bay Regional Hospital.

<sup>21</sup> IBISWorld

Given these positive regional trends and knowing that the industry is currently underrepresented in Hampton Township, there may be future opportunities for industry development within the township.

**Key Findings**

The Health care, social assistance, and government industries are underrepresented in Hampton Township compared to the surrounding region.

There has been an increased demand for health care services among aging population in the region.

Service demand trends toward outpatient and ambulatory care services have increased in recent years and are projected to continue to rise.

The Health care, social assistance, and government industries could align as potential tenants for existing vacant commercial space in the township.

Of the top five national occupations within the target industry, Nursing, Psychiatric, and Home Health Aides have the largest job presence in the CSA, followed by Registered Nurses. Nursing, Psychiatric, and Home Health Aides has the most significant industry concentration in the CSA.

The target industry job trend table for medical office space focuses on the Ambulatory Health Care Services (621) industry economic and job data as subsectors in the industry are common users of medical office space. The occupation table contains economic and job data for the top five national occupations in the aggregated industry set.

**Table 19**

<b>Health Care, Social Assistance, &amp; Government Industry Job Trends (Medical Office Space), Regional Comparison (2014-2019)</b>					
	2019 Jobs	Job Change (2014-2019)	% Job Change (2014-2019)	Location Quotient	Average Earnings
<b>Bay County</b>	2,278	-141	-6%	1.3	\$53,021
<b>Bay-Saginaw-Midland CSA</b>	9,403	-235	-2%	1.1	\$63,398
<b>Michigan</b>	217,819	11,938	5%	0.9	\$73,936
<b>United States</b>	8,054,474	1,032,370	13%	1.0	\$76,974

Table 20

<b>Top 5 Occupations, Health Care, Social Assistance, &amp; Government (Medical Office Space) Target Industry, (2019)</b>					
SOC	Occupation Title	2019 Jobs (Bay-Saginaw- Midland CSA)	Location Quotient (Bay-Saginaw- Midland CSA)	Median Hourly Earnings (Bay-Saginaw- Midland CSA)	Median Hourly Earnings (United States)
31-9090	Miscellaneous Healthcare Support Occupations	2,457	1.5	\$14.12	\$16.58
31-1010	Nursing, Psychiatric, and Home Health Aides	4,394	1.7	\$12.52	\$12.92
29-1140	Registered Nurses	4,411	1.4	\$35.02	\$34.46
43-6010	Secretaries and Administrative Assistants	4,012	0.9	\$17.13	\$18.72
29-1060	Physicians and Surgeons	875	1.1	\$101.68	\$97.88

### Typical Site and Space Needs

- ◆ Proximity to patients and available workforce
- ◆ Accessibility via major roadways
- ◆ Often co-located with hospitals and other medical facilities

### 3.5.2 TRADITIONAL OFFICE SPACE USERS

Future demand for office space is dependent on growth in office-utilizing industries such as the Information, Finance and Insurance, Management of Companies and Enterprises, and Government industry sectors to name a few. As a whole, these industries are forecasted to realize overall decline in total jobs in Bay County over the next decade, while generally remaining stagnant in the Bay-Saginaw-Midland CSA, increasing by only 2% or 1,200 jobs. Knowing this, any new or renovated office space in Hampton County would likely need to be filled by an existing tenant in the region, or via a new tenant from outside of the region locating or expanding their office footprint.

### Key Findings

Traditional office utilizing industries are underrepresented in Hampton Township compared to the surrounding region.

There has been an increased demand for health care among aging population in the region.

Service demand trends toward outpatient and ambulatory care services have increased in recent years and are projected to continue to rise.

Traditional office utilizing industries could align as potential tenants for existing vacant commercial space in the township. This includes supporting office space for larger medical facilities in Bay County.

The Health Care, Social Assistance, and Government target industry have a significant job concentration in Bay County.

The target industry job trend table contains aggregated economic and job data for the Social Assistance (NAICS 624); State Government, excluding Education and Hospitals (NAICS 9029); and Local Government, excluding Education and Hospitals (NAICS 9039) industries as they have the highest potential for future office utilizing industry development in Hampton Township. The occupation table contains economic and job data for the top five national occupations in the aggregated industry set.

**Table 21**

<b>Health Care, Social Assistance, &amp; Government Target Industry Job Trends (Traditional Office Space), Regional Comparison (2014-2019)</b>					
	2019 Jobs	Job Change (2014- 2019)	% Job Change (2014-2019)	Location Quotient	Average Earnings
<b>Bay County</b>	3,339	-12	-1%	1.1	\$59,732
<b>Bay-Saginaw- Midland CSA</b>	10,332	230	2%	0.8	\$58,996
<b>Michigan</b>	290,116	16,614	6%	0.8	\$62,909
<b>United States</b>	12,541,443	840,843	7%	1.0	\$56,583

Table 22

<b>Top 5 Occupations, Health Care, Social Assistance, &amp; Government (Traditional Office Space) Target Industry, (2019)</b>					
SOC	Occupation Title	2019 Jobs (Bay-Saginaw-Midland CSA)	Location Quotient (Bay-Saginaw-Midland CSA)	Median Hourly Earnings (Bay-Saginaw-Midland CSA)	Median Hourly Earnings (United States)
39-9020	Personal Care Aids	2,653	1.02	\$10.81	\$11.53
33-3050	Police Officers	567	0.74	\$16.15	\$29.58
39-9010	Childcare Workers	1,954	1.59	\$9.59	\$15.96
33-3010	Bailiffs, Correctional Officers, and Jailers	563	1.26	\$18.31	\$21.34
25-2010	Preschool and Kindergarten Teachers	432	0.63	\$13.97	\$15.96

**Typical Site and Space Needs**

- ◆ Sites vary in size based on user(s)
- ◆ Proximity to available workforce
- ◆ Quality of life
- ◆ Proximity to amenities (food, fitness, convenience shopping)
- ◆ Ample parking availability



## 3.6 | RETAIL, RECREATION, ENTERTAINMENT, AND DINING



Hampton Township's retail landscape is primarily composed of small stores, pharmacies, grocers, and/or restaurants located along M-25 (Center Avenue) and Pine Road. These retail assets are utilized primarily by residents of Hampton Township and those who work in areas of the township immediately adjacent to them.

Bay City and Bangor Charter Township are the largest retail hubs immediately adjacent to Hampton Township. The area of Bay City east of the Saginaw River (Downtown Bay City) hosts a number of different small to mid-sized retail assets which include a variety of different restaurants, shops, bars, and other retail stores. Bangor Township is the regional retail hub for the Bay City region. The township hosts a similar mix of retail assets to those found in Bay City and Hampton Township, but with a larger presence of significant big box outlets and retail assets (in addition to the Bay City Mall) within its boundaries.

### Key Findings

There is a significant amount of spending leakage out of Hampton Township. This indicates that residents/consumers are purchasing goods and services outside of the township and may represent opportunities for new or expanding businesses.

There is existing commercial space within the township that could be leveraged by future industry tenants. There are existing natural amenities in Hampton Township that could be leveraged for future recreation activities.

The Retail, Recreation, Entertainment, and Dining target industry has a significant industry concentration in Bay County. Retail analyses point to sufficient demand for additional retail options in the township including a building material and supply store, clothing stores, and general merchandise stores.

Of the top five national occupations within the target industry, Retail Salespersons have the largest job presence in the CSA, followed by Fast Food Counter Workers.

The target industry job trend table contains aggregated economic and job data for the Retail (NAICS 44-45); Other Amusement and Recreation (NAICS 7139); and Food Services and Drinking (NAICS 722) industries while the occupation table contains economic and job data for the top five national occupations in the aggregated industry set.

Table 23

<b>Retail, Recreation, Entertainment, and Dining Target Industry Job Trends, Regional Comparison (2014-2019)</b>					
	2019 Jobs	Job Change (2014-2019)	% Job Change (2014-2019)	Location Quotient	Average Earnings
<b>Bay County</b>	11,144	-617	-5%	1.3	\$23,612
<b>Bay-Saginaw-Midland CSA</b>	35,390	-1,097	-3%	1.1	\$24,529
<b>Michigan</b>	864,795	30,515	4%	0.9	\$27,746
<b>United States</b>	29,934,018	1,793,878	6%	1.0	\$29,660

Table 24

<b>Top 5 Occupations, Retail, Recreation, Entertainment, and Dining Target Industry (2019)</b>					
SOC	Occupation Title	2019 Jobs (Bay-Saginaw-Midland CSA)	Location Quotient (Bay-Saginaw-Midland CSA)	Median Hourly Earnings (Bay-Saginaw-Midland CSA)	Median Hourly Earnings (United States)
41-2030	<b>Retail Salesperson</b>	7,380	1.60	\$11.02	\$11.65
35-3020	<b>Fast Food Counter Workers</b>	5,758	1.32	\$9.78	\$10.27
41-2010	<b>Cashiers</b>	4,221	1.13	\$10.39	\$10.79
35-3030	<b>Waiters and Waitresses</b>	2,732	1.02	\$9.54	\$10.47
35-2010	<b>Cooks</b>	2,377	0.92	\$11.24	\$12.14

Given the presence of a diverse mix of retail options located in municipalities immediately adjacent to Hampton Township in addition to other negative demographic and economic trends that have led to the closure of businesses in these industries in the township in recent years, it is unlikely that the township would be able to become a new retail/entertainment/recreation/dining destination in the immediate term. Knowing this, the focus of industry development and attraction efforts should keep in mind that these industries offer a variety of benefits that can either enhance existing or future development and business attraction efforts, or in some cases act as a catalysts for future development in the township. Specific benefits can include:

- ◆ Acting as an amenity for the local workforce who may be drawn to dine or shop in Hampton Township due to the convenience of these assets being located adjacent to their place of work.
- ◆ Improve the quality of life for existing and future Hampton Township residents.
- ◆ Help enhance the overall image and sense of place in the township leading to positive perceptions of the that can help attract future residents or businesses.

## 4 | DEVELOPMENT SITES & INCENTIVES

Identifying and preparing sites for development is an important component in any economic development strategy, as it ensures that sites are available when development opportunities come along. This plan includes 5 site intelligence reports that assess development potential based on physical characteristics and market conditions. The five sites were selected in collaboration with the Steering Committee in consideration of opportunity industries identified for Hampton Township and the following physical attributes:

- ◆ Site size and developable acreage
- ◆ Existing buildings
- ◆ Infrastructure availability and cost (electric, natural gas, water, sewer, telecommunications)
- ◆ Transportation accessibility (roads and highways, rail, waterways)
- ◆ Zoning / future land use plan

Priority sites were deemed to be those that would have the most impact on tax revenue generation and employment generation for Hampton Township. In general, these would be large sites that are served by infrastructure, located on major roads, have existing industrial or commercial zoning, can accommodate one or more of the target industries identified, and have motivated owners. The five sites that were ultimately selected are as follows. The locations of these sites within Hampton Township are shown in **Error! Reference source not found.**

- ◆ Site 1: Meijer-adjacent sites
  - Meijer Outlot A
  - Meijer Outlot B
  - 1590 W. Youngs Ditch Road
- ◆ Site 2: 1000 Knight Road
- ◆ Site 3: W Center Road between Burns and Finn
- ◆ Site 4: Former Hampton Towne Center Mall
- ◆ Site 5: Majestic Plaza (Kroger Plaza)

Table 25 on the next page summarizes key information about each site, including current zoning and infrastructure availability, a determination of highest and best use potential based on market conditions, conformity of these uses with existing zoning, and recommendations for increasing the marketability of the sites.

Please refer to Appendix C for the full site intelligence reports. These reports will be used by Hampton Township and partner organizations to market the sites and inform investors about development opportunities.

*It should be noted that while the Consumers Energy site will be a key redevelopment opportunity once the power plants are fully decommissioned, the site was ineligible for inclusion due to the conditions of the US EDA grant that funded this study. Collaborating with Consumers to determine a future for the site should be a priority action for advancing economic development in Hampton Township.*

Figure 5: Map of Hampton Township Opportunity Sites



Table 25

Opportunity Sites									
Site	Parcel	Site Name	Total Acreage	Buildable Area / Existing Building Space	Current Zoning	Highest & Best Use Potential	Highest & Best Use Potential - Conformity with Zoning	Infrastructure Availability	Recommendations to Optimize Marketability
1	A	Meijer Outlot A	18.06 acres	16.0 acres (undeveloped)	B-1 General Business	New development of: <ul style="list-style-type: none"> <li>▪ Retail</li> <li>▪ Restaurant</li> <li>▪ Recreation</li> <li>▪ Medical office</li> <li>▪ Assisted living</li> <li>▪ Multifamily housing</li> <li>▪ Combination of above uses</li> </ul>	<ul style="list-style-type: none"> <li>▪ Retail, restaurant, and medical office allowed by right.</li> <li>▪ Recreation and drive-through restaurants subject to special conditions.</li> <li>▪ Multi-family and assisted living require special use permit.</li> </ul>	Electric, gas, and water available for all three sites. Sewer available at A and B but NOT C. DSL and wireless available.	Extend sewer to site C. Allow for mixed use development on all three sites.
	B	Meijer Outlot B	2.96 acres	1.82 (undeveloped)					
	C	1590 W. Youngs Ditch Road (behind Meijer)	9.56 acres	7.82 acres (undeveloped)					
2		1000 Knight Road (north side of M-25)	41 acres	22.7 acres in B-2 district; 11.7 acres in R-3A district (undeveloped)	B-2 Ag/Business Transitional; R-3A Medium High Density Residential	New development of: <ul style="list-style-type: none"> <li>▪ Multifamily housing</li> <li>▪ Medical office</li> <li>▪ Assisted living</li> </ul>	<ul style="list-style-type: none"> <li>▪ Medical office allowed by right in B-2</li> <li>▪ Multi-family allowed by right in R-3A</li> <li>▪ Assisted living not allowed in R-3A but permitted with approved Special Use Permit in B-2</li> </ul>	Electric, gas, water, and sewer available. DSL and wireless available.	Allow assisted living as a use permitted through approval of Special Use Permit in the R3-A district.
3		W Center Rd between Burns and Finn (north side of M-25)	80 acres	63.7 acres (undeveloped)	I-1 – Planned Enterprise	New development of: <ul style="list-style-type: none"> <li>▪ Manufacturing/food processing</li> <li>▪ Warehousing or distribution</li> </ul>	<ul style="list-style-type: none"> <li>▪ Manufacturing, warehousing, and distribution permitted by right</li> </ul>	Electric, gas, water, and sewer available. DSL and wireless available.	Ensure adequate availability of clean water for food processing. Upgrade electrical infrastructure to support needs of higher demand user. Extend fiber broadband.
4		Former Hampton Towne Center Mall	26.1 acres	250,000 total SF of building space, of which 210,000 SF is vacant	B-1 – General Business	Redevelopment potential: <ul style="list-style-type: none"> <li>▪ Retail</li> <li>▪ Restaurant</li> <li>▪ Recreation</li> <li>▪ Office</li> <li>▪ Medical office</li> <li>▪ Assisted living</li> <li>▪ Multifamily housing</li> <li>▪ Manufacturing/food processing</li> <li>▪ Warehousing or distribution</li> <li>▪ Combination of above uses</li> </ul>	<ul style="list-style-type: none"> <li>▪ Retail, restaurant, office, and medical office allowed by right.</li> <li>▪ Recreation and drive-through restaurants subject to special conditions.</li> <li>▪ Multi-family and assisted living require special use permit.</li> <li>▪ Manufacturing, warehousing, and distribution allowed through rezoning to I-1.</li> </ul>	Electric, gas, water, and sewer available. DSL and wireless available.	Township Master Plan supports rezoning the property to I-1 Planned Enterprise to support potential development of manufacturing, warehousing and distribution.
5		Majestic Plaza (Kroger Plaza)	5.69 acres	50,000 total SF of building space, of which 45,485 SF is vacant	B-1 – General Business	Redevelopment potential: <ul style="list-style-type: none"> <li>▪ Retail</li> <li>▪ Restaurant</li> <li>▪ Recreation</li> <li>▪ Office</li> <li>▪ Medical office</li> <li>▪ Assisted living</li> <li>▪ Multifamily housing</li> <li>▪ Manufacturing/food processing</li> <li>▪ Warehousing or distribution</li> <li>▪ Combination of above uses</li> </ul>	<ul style="list-style-type: none"> <li>▪ Retail, restaurant, office, and medical office allowed by right.</li> <li>▪ Recreation and drive-through restaurants subject to special conditions.</li> <li>▪ Multi-family and assisted living require special use permit.</li> <li>▪ Manufacturing, warehousing, and distribution allowed through rezoning to I-1.</li> </ul>	Electric, gas, water, and sewer available. DSL and wireless available.	N/A

## ECONOMIC DEVELOPMENT INCENTIVE PROGRAMS

To increase the attractiveness of these sites relative to competing locations in other communities throughout the region, Hampton Township may wish to offer economic development incentives for certain types of development projects in key locations. These incentive programs are enabled by the State and typically offer some level of tax abatement (50% or 100%) for a period up to 10 or 12 years. The legislative body of the community must establish districts, within which individual projects would be eligible for the tax abatement.

It is recommended that Hampton Township assess the viability of each of these tools based on the type of development the community wishes to pursue and attract. Implementation of any of these programs should ensure that incentives offered by the Township are competitive with (but not overly generous compared to) those offered by surrounding communities.

While many view tax abatements as “giving up” much needed revenue, it is important to acknowledge that in many cases, but for the abatements, no development would occur. In other words, the Township is not “giving up” revenue because this revenue would have never otherwise materialized. With an abatement, it may take several years before the community sees significant net positive fiscal impacts, but such programs should be looked at as a long-term strategy for enhancing the community’s tax base. Once the abatement period has ended, the development will be paying its full share of taxes into the Township’s coffers. Certainly any increased municipal costs related to a potential new development (e.g. public safety or emergency services) should also be weighed to ensure that fiscal impacts on the township are neutral or better in the short term.

### PA-210 Commercial Rehabilitation Act

PA 210 encourages the rehabilitation of commercial property by abating the property taxes generated from new investment for a period up to 10 years. Before the property tax abatement can be granted to the commercial property owner, township by resolution of its legislative body, must establish a Commercial Rehabilitation District.

Such a district could make sense in the B-1 zoned area along Center Avenue where there are many underutilized properties in need of rehabilitation.

### PA-198 Industrial Property Tax Abatement

Industrial property tax abatements provide incentives for eligible businesses to make new investments in Michigan. These abatements encourage Michigan manufacturers to build new plants, expand existing plants, renovate aging plants, or add new machinery and equipment. High technology operations are also eligible for the abatement. Once an Industrial Development District or Plant Rehabilitation District is established, the company may apply for an abatement of approximately 50% of real property taxes for up to 12 years.

An Industrial Development District may be appropriate for the I-1 zoned area along West Center Road.

Please refer to Appendix D for fact sheets on each of these programs.



# DATA SOURCES

## **ECONOMIC MODELING SPECIALISTS INTERNATIONAL (EMSI)**

To analyze the industrial makeup of a study area, industry data organized by the North American Industrial Classification System (NAICS) is assessed. Camoin Associates subscribes to Economic Modeling Specialists Intl. (EMSI), a proprietary data provider that aggregates economic data from approximately 90 sources. EMSI industry data, in our experience, is more complete than most or perhaps all local data sources (for more information on EMSI, please see [www.economicmodeling.com](http://www.economicmodeling.com)). This is because local data sources typically miss significant employment counts by industry because data on sole proprietorships and contractual employment (i.e. 1099 contractor positions) is not included and because certain employment counts are suppressed from BLS/BEA figures for confidentiality reasons when too few establishments exist within a single NAICS code.

## **ESRI BUSINESS ANALYST ONLINE (BAO)**

ESRI is the leading provider of location-driven market insights. It combines demographic, lifestyle, and spending data with map-based analytics to provide market intelligence for strategic decision-making. ESRI uses proprietary statistical models and data from the U.S. Census Bureau, the U.S. Postal Service, and various other sources to present current conditions and project future trends. Esri data are used by developers to maximize their portfolio, retailers to understand growth opportunities, and by economic developers to attract business that fit their community. For more information, visit [www.esri.com](http://www.esri.com).

## **REFERENCEUSA**

ReferenceUSA's searchable database of U.S. businesses allows the user to identify businesses matching various criteria, including industry, geography, sales, employment count, and other characteristics. ReferenceUSA is useful for developing company lists for business attraction and retention activities, as well as gaining a more granular understanding of the businesses that make up a region's economy. ReferenceUSA is a division of Infogroup. For more information, visit <http://resource.referenceusa.com/>

## **CENSUS OF AGRICULTURE, U.S. DEPARTMENT OF AGRICULTURE (USDA)**

The Census of Agriculture provides a detailed picture of U.S. farms and ranches and the people who operate them. It provides uniform, comprehensive agricultural data for every state and county in the U.S. on topics including agricultural land, animal and crop production, employment, worker demographics, farm business operations, and the environment. and employment. It is conducted by the U.S. Department of Agriculture (USDA) every five years, in years ending in "2" and "7".

## **US BUREAU OF LABOR STATISTICS**

The Bureau of Labor Statistics (BLS) is a unit of the United States Department of Labor. It is the principal fact-finding agency for the U.S. government in the broad field of labor economics and statistics and serves as a principal agency of the U.S. Federal Statistical System. The BLS is a governmental statistical agency that collects, processes, analyzes, and disseminates essential statistical data to the American public, the U.S. Congress, other Federal agencies, State and local governments, business, and labor representatives. The BLS also serves as a statistical resource to the United States Department of Labor, and conducts research into how much families need to earn to be able to enjoy a decent standard of living. More at <https://www.bls.gov/>.



# APPENDICES

## **Appendix A: Community Survey Results**

Detailed question-by-question responses to the community survey.

## **Appendix B: Baseline Economic Analysis**

Analysis detailing Hampton Township's current economy, completed in March 2020.

## **Appendix C: Site Intelligence Reports**

Site intelligence reports prepared for five sites in Hampton Township.

## **Appendix D: Incentive Program Fact Sheets**

Fact sheets on the State incentive programs.



# APPENDIX A: COMMUNITY SURVEY RESULTS

The survey was posted online (in addition to being available in hard copy upon request), advertised through multiple online platforms, and 3,000 postcards were sent to all Hampton Township addresses that currently receive water bills from the Township in an effort to gain robust feedback and participation. The survey was open from April 22 until May 25, 2020 and received a total of 630 responses.

## Question #1: Which of the following applies to you?

### Summary of Responses (630 responses):

**I live in Hampton Township:** 78%

**I live and work in Hampton Township:** 13%

**I work in Hampton Township:** 5%

**I do NOT live or work in Hampton Township:** 4%

## Question #2: What is your ZIP code of residence (if known)?

### Summary of Responses (624 Responses):

**48732 (Essexville, MI):** 74%

**48708 (Bay City, MI):** 18%

**48706 (Bay City, MI):** 3%

**48747 (Munger, MI):** 1%

**Other ZIP code:** 4%

## Question #3: What is the ZIP code of your place of work (if applicable/if known)?

### Summary of Responses (342 Responses):

**48732 (Essexville, MI):** 36%

**48708 (Bay City, MI):** 27%

**48706 (Bay City, MI):** 14%

**48601 (Saginaw, MI):** 4%

**48640 (Midland, MI):** 3%

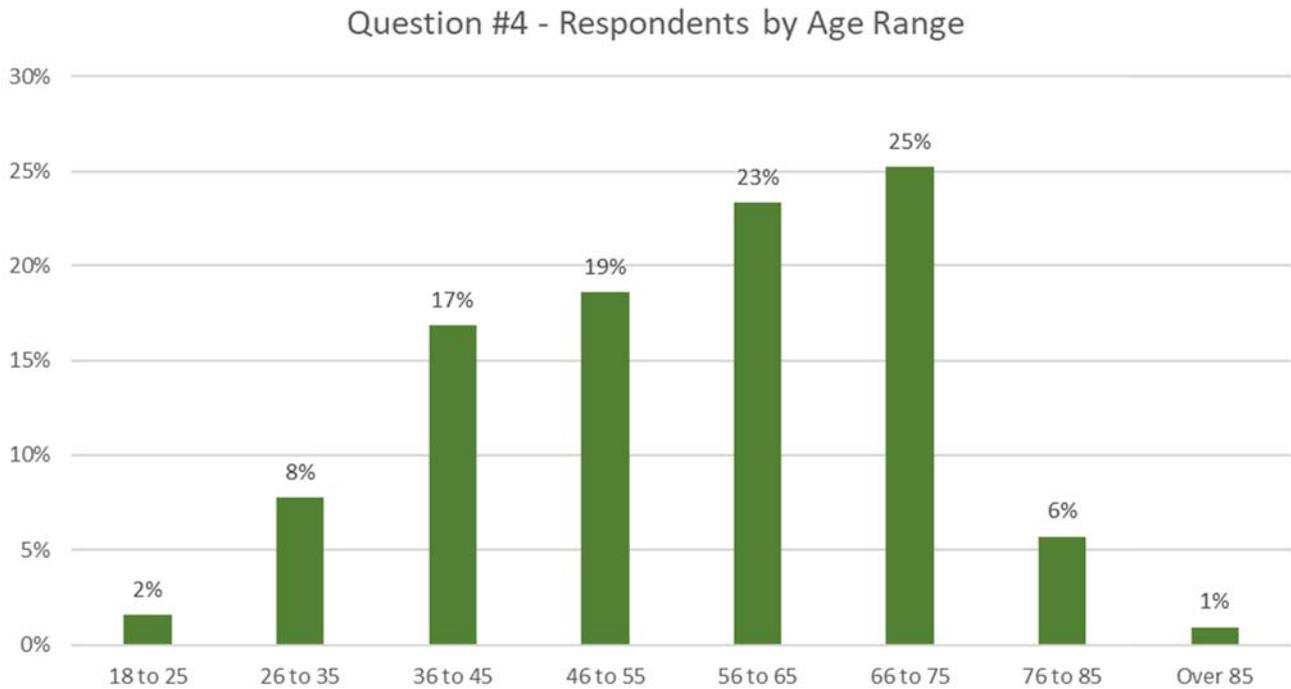
**48602 (Saginaw, MI):** 2%

**48642 (Midland, MI):** 2%

**Other ZIP codes:** 12%

**Question #4: Please indicate the age range that applies to you.**

*Summary of Responses (630 Responses):*



**Question #5: Which factors do you believe pose the greatest challenge to the future of Hampton Township’s economy?**

*Summary of Responses (629 Responses):*

**#1: Attracting New Businesses (82%)**

**#2: Retaining Existing Businesses (67%)**

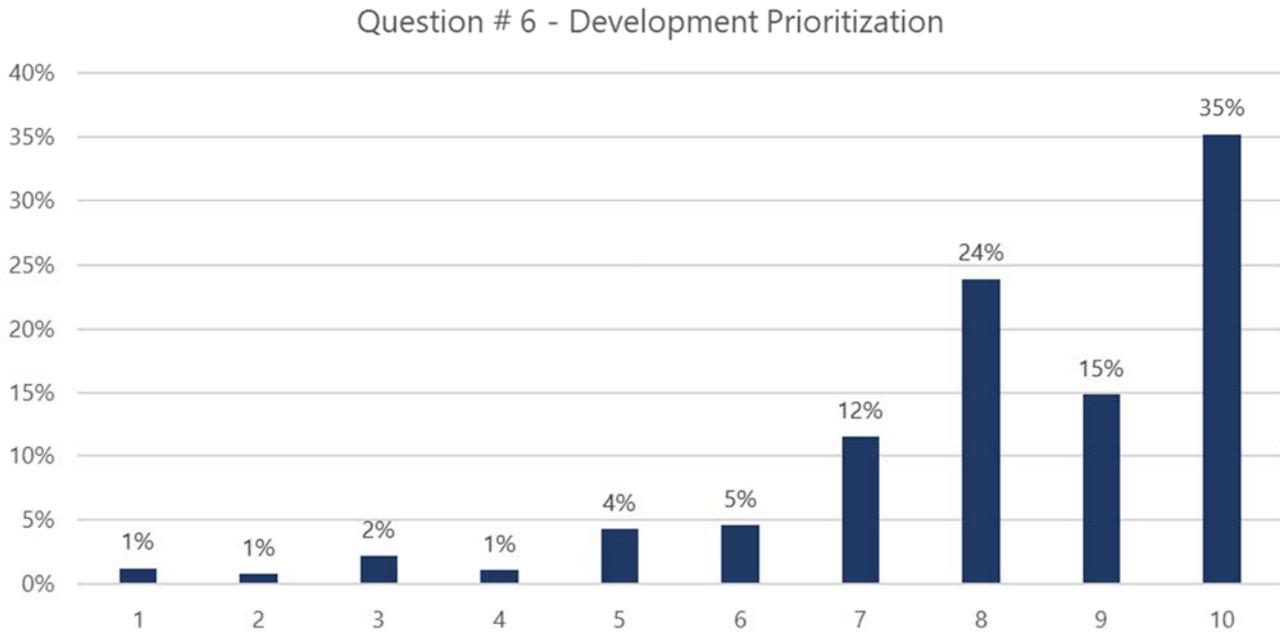
**#T3: Growing the Tax Base (54%)**

**#T3: Job Growth (54%)**

**#4: Developing Housing (14%)**

**Question #6: On a scale of 1-10, what priority should the Township give to attracting new development (i.e. construction of commercial, industrial, and/or residential uses) as a means of advancing the economic future of the Township?**

**Summary of Responses (624 Responses):**



**Question #7: Which of these statements BEST captures your attitude towards new development (i.e. construction of commercial, industrial, and/or residential uses) in Hampton Township?**

**Summary of Responses (626 Responses):**

I am supportive of certain types of development as long as they don't significantly impact the current character of the community: **42%**

Growing the tax base and creating jobs should be the Township's priority, and I therefore support most new development that accomplishes these goals, even if it comes with some negative impacts: **31%**

I am willing to accept some negative impacts (e.g. increased car or truck traffic, noise, air pollution, loss of farmland/green space) that could come with new development if it results in significant tax base growth and job creation: **23%**

Future development in Hampton Township should be kept to a minimum, even if it means higher property taxes, fewer Township services, and/or fewer employment opportunities: **3%**

**Question #8: Which of the following industry sectors do you believe present the highest potential for future economic growth in Hampton Township?**

**Summary of Responses (620 Responses):**

- #1: Agricultural Production** (53%)
- #2: Manufacturing** (49%)
- #3: Health Care and Social Services** (46%)
- #4: Energy/Utilities** (45%)
- #5: Retail** (38%)
- #6: Food Processing** (36%)

**Question #9: Which of the following retail options are most needed in Hampton Township?**

**Summary of Responses (623 Responses):**

- #1: Full Service/Sit-Down Restaurants** (68%)
- #2: Hardware/Building Material & Supply Stores** (51%)
- #3: Entertainment (movie theaters, mini-golf, bowling alleys, etc.)** (45%)
- #4: General Merchandise Stores** (42%)
- #5: Clothing Stores** (37%)
- #6: Limited Quick Service Restaurants** (24%)
- #7: Fitness (Fitness Studios, Gyms, etc.)** 14%
- #8: Grocery Stores** (11%)
- #9: No Additional Retail Options Needed** (8%)

**Question #10: Which age groups are most in need of additional housing options in Hampton Township?**

**Summary of Responses (542 Responses):**

- Age 25 to 44:** 68%
- Age 45 to 64:** 30%
- Age 65+:** 26%
- Age 18 to 24:** 22%

### Question #11: What types of new housing are most needed in Hampton Township

#### Summary of Responses (594 Responses):

- #1: For-Sale Single Family Homes (68%)
- #2: For-Sale Townhomes/Condos (37%)
- #3: Market Rate Rental Apartments (22%)
- #4: Senior Housing (22%)
- #5: Below Market/Affordable Rental Apartments (14%)

### Question #12: Are there any specific geographic areas within Hampton Township that stand out as having high potential for future economic development activity?

#### Summary of Responses (389 Responses):

- ◆ The Hampton Town Centre (formerly Hampton Square Mall)
- ◆ M-25 Corridor and Center Avenue
- ◆ Pine Street
- ◆ Areas Adjacent to Waterfronts
- ◆ Existing Consumers Energy Site
- ◆ Existing Farm Land

### Question #13: What do you feel are the greatest assets that should be leveraged to support a healthy economy in Hampton Township? Assets may include characteristics of the community, natural assets, infrastructure, existing buildings, organizations/businesses, etc.

#### Summary of Responses (391 Responses):

- ◆ The Hampton mall
- ◆ Waterfronts, Parks, Trails, and Open Space
- ◆ Existing Vacant Buildings
- ◆ The Close-Knit Community
- ◆ The Highly Ranked School System

### Question #14: What do you feel are the greatest challenges for future economic growth in Hampton Township?

#### Summary of Responses (435 Responses):

- ◆ Overcoming the gap that will be left by the closure of the Consumers Energy plant.
- ◆ Restrictions and opposition to change imposed by the Township Planning Board.
- ◆ Young professionals and families leaving the Township.
- ◆ Vacant storefronts.
- ◆ Overall resistance to change from older generations.
- ◆ Lack of quality, good paying jobs.
- ◆ Attracting new businesses
- ◆ Lack of amenities and attractions to appeal to new residents and businesses

### Question #15: Any other comments/feedback?

#### Summary of Responses (242 Responses):

- ◆ Consider conversion of Consumers Energy plant to a wind/solar power generation facility.
- ◆ Consider merging with Essexville and/or Bay City to reduce costs and realize other efficiencies
- ◆ Promote, market, and brand Hampton Township so that it is unique, has a better sense of place, and that overall perceptions change.
- ◆ General appreciation and thanks for outreach to the community through the survey.

# APPENDIX B: BASELINE ECONOMIC ANALYSIS



# APPENDIX C: SITE INTELLIGENCE REPORTS



# APPENDIX D: INCENTIVE PROGRAM FACT SHEETS





# Leading action to grow your economy

Saratoga Springs, NY  
Richmond, VA  
Portland, ME  
Boston, MA  
Brattleboro, VT

