



Great Lakes Bay Region Destination Assets Analysis

July 20, 2017

July 20, 2017

Annette Rummel, PhD/CEO

Great Lakes Bay Regional Convention and Visitors Bureau

515 N Washington Avenue 2nd Floor

Saginaw, Michigan 48607

Dear Ms. Rummel,

Great Lakes Bay Regional Convention and Visitors Bureau (GLBCVB) engaged the Hunden Strategic Partners Team (HSP or HSP Team) to conduct a tourism and quality of life destination development master plan for the Great Lakes Bay Region. The study analyzed the existing tourism attractions of the region and then identified gaps and opportunities in Saginaw County, Bay County and Midland County. Based on this analysis, HSP provided specific recommendations for each county to drive hotel room nights, fill gaps in the leisure calendar, and complement the existing assets of the region. Attached is our report.

This deliverable has been prepared under the following general assumptions and limiting conditions:

- The findings presented herein reflect analysis of primary and secondary sources of information that are assumed to be correct. HSP utilized sources deemed to be reliable, but cannot guarantee their accuracy.
- No responsibility is taken for changes in market conditions after the date of this report and no obligation is assumed to revise this report to reflect events or conditions occurring after the date of this report.
- HSP has no control over construction costs or timing of construction and opening of any recommended projects.
- Macroeconomic events affecting travel and the economy cannot be predicted and may impact the development and performance of any recommended projects.
- We have enjoyed serving you on this engagement and look forward to providing you with continuing service.

Sincerely yours,

Hunden Strategic Partners

TABLE OF CONTENTS

Executive Summary

Chapter 1: Regional Overview

Chapter 2: Bay County Analysis

Chapter 3: Midland County Analysis

Chapter 4: Saginaw County Analysis

EXECUTIVE SUMMARY

Executive Summary

The Great Lakes Bay Regional Convention & Visitors Bureau retained Hunden Strategic Partners (HSP) to perform a destination assets analysis (also known as a destination development or tourism master plan) for the Great Lakes Bay Region, encompassing three counties (Bay, Midland, and Saginaw), and the cities of Bay City, Birch Run, Chesaning, Frankenmuth, Midland, and Saginaw. Hunden Strategic Partners determined the area's assets and gaps in destination market segments including hotels, meetings, sports, entertainment, dining, retail, attractions and related developments/uses, as well as events/festivals.

While the analysis considered the assets and gaps of the three counties generally, the results of the analysis included recommendations on three focus areas, one within each county. However, HSP added other recommendations beyond these three sites/focus areas in order to provide a comprehensive assessment. The study is not meant to complete a full feasibility study on any particular development, but suggest the developments that *should* be studied in more detail for these sites/focus areas.

The focus areas include a site in the village of Birch Run, the city of Midland, and Bay City. HSP added recommendations for downtown Saginaw and rural areas of the counties. Finally, HSP provided an overview of other trending tourism assets and events that may be of interest to stakeholders in the area. Frankenmuth, which is a dominant force in tourism, was not a focus of this study. However, to the extent that Frankenmuth offered an asset that was missing nearby, HSP considered this so as not to recommend a project or further study of an asset that would duplicate existing strengths.

In total, the Great Lakes Bay Region offers a strong variety of tourism assets. There is a wide range of existing experiences that tourists can access and enjoy throughout the year, including urban and walkable options, natural and recreational activities in urban and rural areas and destination developments like outlet malls, waterparks, and sports and entertainment facilities. Historically, the region has been both a destination and a collection of pass-through attractions for those driving from the southern metropolitan areas to northern lower Michigan (including the Lake Michigan coast) and the Upper Peninsula. It has been difficult for the region's natural assets in Saginaw Bay and related rivers that flow into it to compete with the sandy beaches of Lake Michigan to the west. However, as the region has de-industrialized as part of a larger shift in the national manufacturing economy, the natural landscape, including the rivers and lakes, have been the focus of more attention, investment and revitalization. The region boasts new and underway nature trails for hiking and biking, rivers and the Saginaw Bay for canoeing, kayaking and boating. Yet with active and committed leadership, more can be done to advance these assets to both restore quality and allow for recreational use.

Executive Summary

The urban centers of Bay City, Midland and Saginaw have also been reinvigorated in recent years. All have developed substantially in terms of restaurants, sports and entertainment outlets and overall attractiveness and walkability. HSP believes that active, walkable downtowns are not a fad and that current and future generations will be attracted to these environments, just as they will seek recreation in the natural environments. For these reasons, the recommendations focus primarily on urban developments that help attract and retain visitors, residents and companies – fully realizing that residents and companies also act as visitation generators. The assets that are developed to attract tourists also act as local assets to attract and retain residents, talented employees and the companies seeking this talent.

HSP recommends that detailed studies be conducted for city-oriented developments in Bay City, Midland and Saginaw.

In Saginaw, the biggest opportunities appear to be leveraging existing assets. The Dow Event Center is a current center of activity, and it is joined by the Huntington Event Park across the street. Between the two, there is already some year-round activity. However, there are some missing elements that would greatly enhance the area's ability to attract and accommodate events, as well as encourage pre- and post- activity at street level and in restaurants. First, HSP recommends studying an expansion of the Dow Event Center to become a better entertainment and sports facility, and also add exhibit, ballroom and meeting space for true convention activity. Second, HSP recommends studying a convention headquarters hotel to be located adjacent or across the street, which would enable Saginaw to host larger events. Currently there are no hotels downtown. Third, HSP recommends studying enhancements to the Huntington Event Park to become a more active entertainment facility, potentially with fixed or raked seating and other creature comforts, amenities and production equipment. These could attract more and better events as well as encourage more attendance and higher ticket prices/spending in and around the event. The wide, mostly uninspiring streets at this key intersection can be favorably enhanced to create a destination district with better lighting, streetscaping, landscaping, benches and the opportunity for kiosks and other active assets on weekends and during events. This would create more of an atmosphere for people to gather before and after events in a safe environment, spend money and encourage the feasibility of restaurants, shops and bars nearby. Finally, HSP recommends moving the CVB's offices to a street-level presence as part of that enhancement in the event intersection in front of the Dow Event Center – and as a welcoming way to connect visitors with tourism ambassadors.

Executive Summary

Alternately, Birch Run has been a tourist-driven collection of assets for a generation, centered around the Simon Premium Outlets. Time and changes in the retail landscape suggest that more investment is needed to retain existing retailers, customers and induce new ones. Newer, more localized competition in Ann Arbor has removed some of the exclusivity that Birch Run had for many years. As a result, Birch Run must evolve to maintain its destination appeal. HSP recommends a deeper study of two major investments that would set Birch Run apart for the next generation: an indoor youth sports facility on land adjacent to the mall and a restaurant/entertainment district that would connect the elements of the existing mall. Competitive youth sports are exploding across the U.S. and the Great Lakes Bay Region has already established a strong reputation for primarily outdoor sports. However, indoor sports tournaments during the colder months of the year would help improve hotel occupancy, and induce traffic to the shops from October through April. A deeper study should be engaged. HSP also recommends a mix of dining and drinking options that allows for year-round activity that would feed and entertain the shoppers and youth sports visitors, complete with heated outdoor areas. The concept is a mix of two existing concepts: the urban entertainment district and the suburban lifestyle center. Essentially, people need and want places to eat and drink beyond the typical restaurant chain experience. If they are going to experience Birch Run for more than one afternoon, the restaurant district will provide the glue that enhances and extends the stay and spending experience. The youth sports facility will provide the activities that will induce demand to Birch Run during the cold months. During summer months, the facility may be usable for indoor consumer or other events that are too large for the existing privately-owned event venue. HSP notes other potential attractions for Birch Run, such as a wakeboard park and others.

Chesaning offers a great opportunity to enhance the farm-to-table and rural experience that many seek. Event venues that offer more of the “wedding barn” experience or other agricultural activities such as farming, picking, growing, plucking, milking, carving, baking, harvesting, canning or other related experiences are popular. The more these can be packaged, yet still be authentic, the better to enhance visitation. Rural accommodations that provide modern amenities in a rural environment, or even “glamping,” should be studied.

Executive Summary

In Bay City, the downtown area has become a hot destination and walkable past time with its restaurants, shops and nearby historical homes and neighborhoods. Access to the water has been a key focus and will continue to be for many years. The development of the DoubleTree By Hilton Hotel Bay City Riverfront enhanced the community's ability to host events throughout the year in a high quality venue. HSP recommends studying additional ways to allow the general public to access the Saginaw Bay itself, as well as the Saginaw River leading to it. People love to enjoy a water view and more eating and drinking establishments that enable this are recommended. HSP also recommends investigating an indoor/outdoor entertainment venue that will allow for year-round entertainment. During warmer months, the outdoor option will allow the public to enjoy music near the water. HSP also recommends investigating events that help attract visitors in the colder months. As a regional strategy, HSP recommends related events that encourage visitors to spend time in each location. Examples include craft beer or specialty food events, winter festivals and others that do not overlap existing festivals and events.

For Midland, HSP suggests investigating a small conference/convention facility and related hotel that would enhance the H Hotel and downtown's ability to accommodate groups that currently cannot fit into existing facilities. In addition, an "urban trail," similar to the Cultural Trail in Indianapolis, is recommended to connect the various assets in and around downtown Midland, including the Tridge, Dow Diamond and downtown's restaurants and shops. Additional events that extend the impact of the Santa theme in the winter would also extend tourist activity, especially in the winter months. Finally, connectivity between the city and the rural trails and rivers should be investigated. The local population is very active and wants to enhance their opportunities for recreation. These assets naturally become visitor enhancements.

Executive Summary

The matrix to the right summarizes HSP's findings for the focus areas of this analysis with regards to the existing market supply for each use. The color green represents a strong existing supply (dark green = strongest), considering both quantity and quality, for the category. Yellow, orange, and red (weakest), indicate limited or weak supply, suggesting a gap in the market.

Category	Saginaw - City/County	Saginaw - Birch Run	Saginaw - Frankenmuth	Bay	Midland
Convention/Conference/Meeting	Limited	Fair	Good	Limited	Limited
Arena/Sports/Culture/Entertainment	Good/Fair	Weak	Limited	Seasonal	Good/Fair
Youth/Amateur Sports Facilities	Outdoor	Weak	Limited	Weak	Limited
Hotel/Resort/Waterpark/Lodging	Limited	Fair	Strong	Limited	Fair
Other Attractions	Limited	Weak	Strong	Limited	Limited
Shopping/Dining	Limited	Strong	Strong	Downtown	Weak
Recreation/Parks/Nature	Improving	Limited	Good	Improving	Improving
Events/Festivals	Limited	Limited	Strong	Seasonal	Limited

Executive Summary

The table below summarizes HSP’s primary recommendations for Bay City, Birch Run, Midland, and Saginaw.

Market	Summary of Recommendations			
	Recommendation A	Recommendation B	Recommendation C	Additional Ideas for Consideration
Bay City	Indoor/Outdoor Concert Venue	Riverfront Dining and Entertainment	Water Activation - Harbor/Pier Development	Specialty Food Festivals
Birch Run	Indoor Youth Sports Complex	Dining/Drinking Connection District	Outdoor Attraction	Kids Playland
Midland	Flexible Conference Center	Attached or Adjacent Downtown Hotel	Urban Trail	Winter Events (Extension of Santa Theme)
Saginaw	Renovated and Expanded Dow Event Center	Headquarter Hotel	Destination/Events Street District	Enhanced Huntington Event Park, CVB Relocation, Winter Events

The study showcases all the great assets that the Great Lakes Bay Region offers, yet pinpoints a number of opportunities that should be studied further. In addition to the primary recommendations shown above, HSP also presents information on other concepts that could be considered for each market. The balance of this report provides background on all of these items.

Chapter 1

Regional Overview

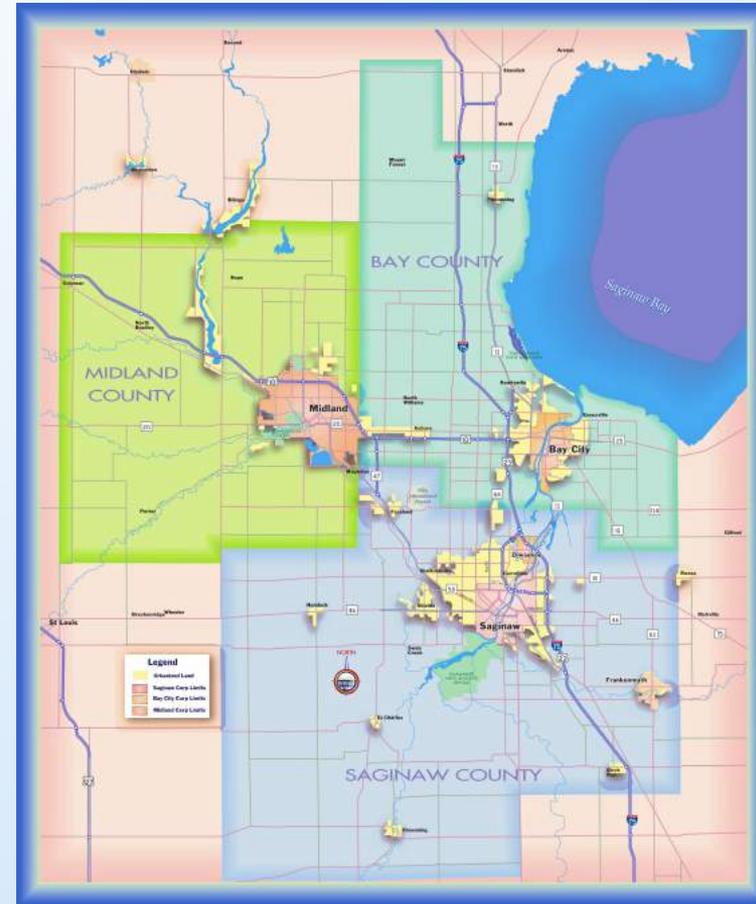
Regional Overview

The Great Lakes Bay Region includes three counties (Bay, Midland, and Saginaw) and the cities of Bay City, Birch Run, Chesaning, Frankenmuth, Midland, and Saginaw. Bay, Midland, and Saginaw Counties make up a Combined Metropolitan Statistical Area that totals 382,598 people in Mid/Central Michigan. For the millions of people that drive north for vacation recreation from such places as Metropolitan Detroit, Ann Arbor, and Toledo, Ohio, the Great Lakes Bay trio of counties and cities makes up the last true urban region on the way "Up North", and is the northernmost metropolitan area in Michigan. As such, it is a popular stopping point for travelers on I-75 to take time out to eat, shop, and rest. From either the northern suburbs of Detroit or Ann Arbor, Birch Run is about 70 miles away, as is Frankenmuth. The Cabela's store in Saginaw is a 90 mile drive, downtown Bay City is 95 miles, and Midland is 112 miles along this northerly trek. In all, the area is about a two hour drive from the over five million people in the Detroit and Ann Arbor metro area. The region is just under halfway to the popular tourist centers of Traverse City or the Mackinac area, which are each about a four hour drive time from suburban Detroit.

Population and Growth Rates

	Population				Percent Change 2000-2015
	1990	2000	2010	2015 Estimate	
United States	248,709,873	281,421,906	308,745,538	321,418,820	14.2%
Michigan	29,760,021	33,871,648	37,253,956	39,144,818	15.6%
Bay County	111,732	110,157	107,771	105,659	-4.1%
Midland County	75,651	82,874	93,629	83,632	0.9%
Saginaw County	211,946	210,039	200,169	193,307	-8.0%

Source: U.S. Census Bureau, Hunden Strategic Partners



Regional Overview

Together, the three communities share the MBS International Airport in Freeland, which opened a new \$55 million terminal in 2012. Once the third busiest airport in Michigan during a period of rapid growth in the 1980s and 90s (after Detroit and Grand Rapids), the airport lost flights to the Flint airport, which is a more convenient airport for the suburban fliers in Oakland County. Currently, two airlines serve the airport (Delta and United), but the commission is hopeful that more airlines commit to the airport to offer better service and more price competition.

In terms of communications, the Great Lakes Bay Region is also served by their own television and radio stations, and each city prints a daily newspaper.



Chapter 2

Bay County Analysis and Recommendations

Bay County

Bay County contains 25 miles of Lake Huron shoreline off Saginaw Bay. Much of the shoreline is utilized by parks and wildlife areas, such as the Quanicassee Wildlife Area, Bay City State Recreation Area, Tobico Marsh Nature Area, and Nayanquing Point State Wildlife Area. The north-south Interstate 75 is the way most visitors and travelers see the county. The county, despite its sizable area, features a few towns and cities, such as Pinconning, Linwood, Auburn, and Essexville. Bay City is by far the largest city with retail, employment, entertainment, and cultural offerings. Although Saginaw was the first settlement in the region, ships had difficulty traversing the shallow waters near Saginaw, and a new saw mill, lumbering and shipbuilding city called Lower Saginaw was formed downstream. Lower Saginaw, by 1865, became incorporated as Bay City. The city grew rapidly on both banks of the Saginaw River, with West Bay City being incorporated into Bay City in 1905. At that point, the city's population had reached 45,000, enjoying the robust industries surrounding the wealth of timber. The city's population grew to 53,604 in 1960, when thereafter, the city's population began to shrink with families moving to newer homes outside of the city limits. Bay City's industrial muscle took a hit with the closing of DeFoe Shipbuilding Company in 1975 and Industrial Brownhoist crane builders in 1983. Although the city's population is only 34,000 today, its urban area, including the city and the developed land around the city, stands at 70,000 and the entire county, which is also the metropolitan area, houses 107,110 citizens. Bay City's strong ties to naval history is showcased by the permanently-moored USS Edson at the Saginaw Valley Naval Ship Museum. Its location is within Bay City is at the Independence Park Boat Launch right next to the Independence Bridge.



Bay City

Bay City is actually comprised of two downtowns, one on each side of the Saginaw River. The east side is centered on the north-south Washington Avenue and features a variety of restaurants, shops, arts attractions, the DoubleTree Hilton Hotel Bay City Riverfront, Wenonah Park, and the Delta College Planetarium. Across the river is Veterans Memorial Park, with a marina, athletic fields, miniature golf, a waterside Hooters restaurant, a large swimming pool, the historic Trombley House, a pier, and the Kantzler Memorial Arboretum. A few blocks to the north is the six-block long Midland Street Historic District, which is home to the city's premier bar district. Water Street, part of the east-side downtown, has the largest collection of antique dealers in the state.



Convention, Conference, and Meeting Facilities

Bay County offers two event facilities with more than 3,000 square feet of total function space; the Bay Valley Resort and Conference Center and the DoubleTree by Hilton Hotel Bay City Riverfront. While Bay County offers significantly less venues with function space than Saginaw County, the county features only one less venue with walkable hotel rooms, a critical amenity to attracting events. The market is limited by a lack of event venues, but the quality of the spaces, specifically the DoubleTree by Hilton Bay City Riverfront, exceeds that of Saginaw and Midland Counties.

Bay County Meeting Market Analysis

Facility	City	Total Function Space (SF)	Exhibit Space (SF)	Ballroom Space (SF)	Meeting Space (SF)	Breakout Rooms	Walkable Hotel Rooms
Bay Valley Resort & Conference Center	Bay City	14,355	--	5,032	9,323	13	145
DoubleTree by Hilton Hotel Bay City - Riverfront	Bay City	12,750	--	7,630	5,120	8	150
Average	--	13,553	--	6,331	7,222	11	148

* Room sizes estimated off of room capacities
 Source: Various Event Facilities, Hunden Strategic Partners



Bay Valley Resort and Conference Center



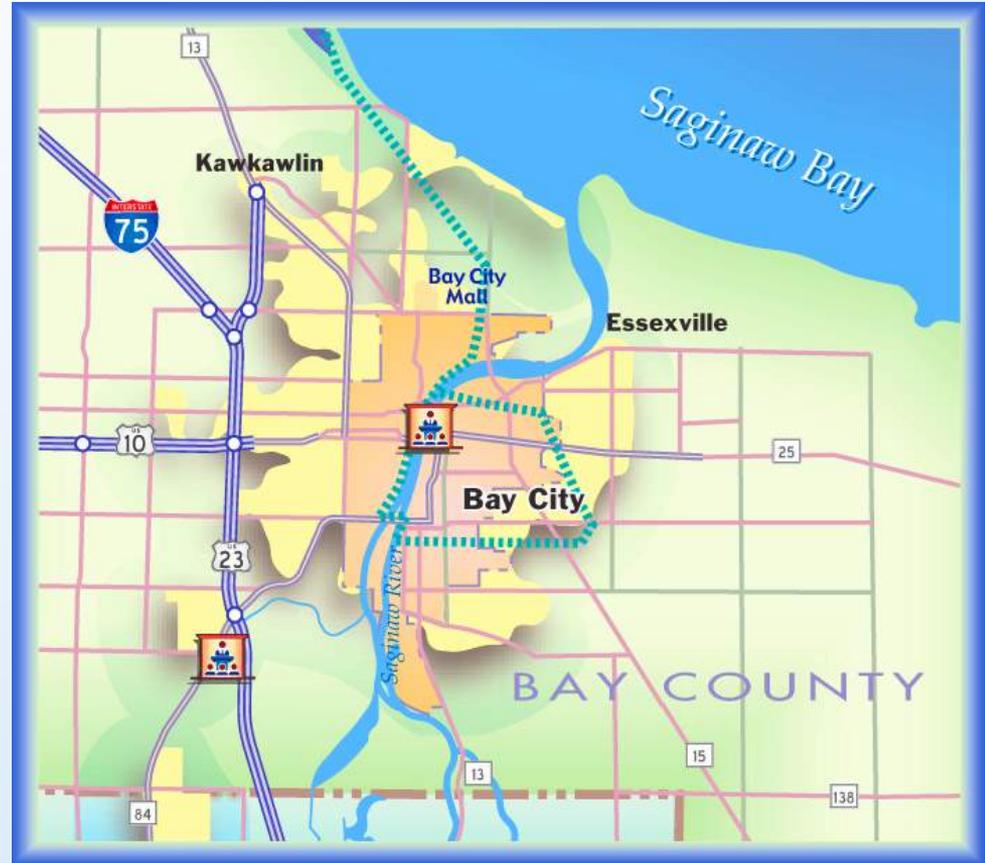
DoubleTree by Hilton

Convention, Conference, and Meeting Facilities

Located just south of downtown Bay City north of 7th street, the DoubleTree by Hilton Hotel Bay City Riverfront is considered one of the region's top meeting and event venues. Located on the banks of the Saginaw River, the hotel features a 7,600-square foot ballroom with eight breakout rooms combining to offer more than 5,000 square feet of meeting space. The 150-room hotel, which opened in 2004, also features the Riverfront Grille restaurant. It is the top selling venue in the market, and conversations with local representatives indicated that since opening, the hotel has had a significant positive impact on the community and has been received extremely well.



DoubleTree by Hilton



Arena, Sports & Entertainment Facilities

Bay County offers three primary entertainment venues, including the Tri-City Motor Speedway in Auburn, Michigan. The State Theatre in downtown Bay City, a 550-seat theater built in 1908, is generally well-received within the local community, but conversations with stakeholders indicated that the community lacks a sizeable entertainment complex. While Saginaw offers the Dow Event Center and Midland offers Dow Diamond and the Midland Center for the Arts, to date Bay County is unable to attract major entertainment acts due to the lack of a large, multipurpose entertainment complex. A 5,000-square foot pavilion development within Wenonah Park has been approved and will likely begin construction in September of 2017. While the new space will be able to host some outdoor events, the venue will not be able to attract and accommodate large major entertainment acts.

Bay County - Entertainment Venues

Facility Name	Venue Type	Capacity
State Theatre	Theater - Music	550
Bay City Players	Theater - Music	297
Tri-City Motor Speedway	Racing	N/A
Average		424

Source: Hunden Strategic Partners



State Theatre



Tri-City Motor Speedway

Arena, Sports & Entertainment Facilities

The two theaters, State Theatre and the Bay City Players, are located in downtown Bay City, while the Tri-City Motor Speedway is located in Auburn. In speaking with local stakeholders, HSP understands there is a lack of signage steering people toward the speedway. HSP believes there is an opportunity for Bay County to develop an additional outdoor entertainment venue, capitalizing on either river or lakefront access.



Tri City Motor Speedway



Hotel, Resort, Waterpark and Other Lodging

Analysis of the Bay County lodging supply suggests a positive overall trend in development. The upscale Courtyard by Marriott Bay City opened in the summer of 2016, and the 91-room upper midscale Hampton Inn & Suites Bay City is currently under construction. Strong performance of the hotel market and increasing unaccommodated demand has attracted developers to the market, a positive sign for the local tourism industry. In total, the county offers 985 total hotel rooms, with an average opening year of 1983.



Courtyard Bay City

Bay County Lodging

Property	Distance from Bay City	Rooms	Chain Scale	Open Date
Comfort Inn Bay City - Riverfront	0.1	100	Upper Midscale	Apr-68
DoubleTree Hilton Hotel Bay City Riverfront	0.2	150	Upscale	Jun-04
Courtyard by Marriott Bay City	0.3	100	Upscale	Jun-16
The Historic Webster House	0.5	6	Indep	Jun-40
Budget Inn	0.6	37	Indep	--
Bay Motel	1.4	18	Indep	Jun-66
Delta Motel	1.4	19	Indep	--
Euclid Motel	1.8	36	Indep	--
Travel Inn	1.9	21	Indep	Mar-81
Fairfield Inn Bay City	2.1	64	Upper Midscale	Jun-97
Holiday Inn Express & Suites Bay City	3.1	77	Upper Midscale	Dec-08
Hampton Inn & Suites Bay City	3.2	91	Upper Midscale	U/C
AmericInn Hotel and Suites Bay City	3.8	65	Midscale	Jun-98
EconoLodge Bay City	4	54	Economy	Jun-66
Bay Valley Resort & Conference Center	4.1	147	Indep	Jun-73
Crystal Inn Hotel & Suites	12.1	NA	Indep	--
Total/Average	1.9	985	--	Oct-83

Source: STR, Hunden Partners

Hotel, Resort, Waterpark and Other Lodging

Bay City offers three high-quality lodging facilities within walking distance, the Comfort Inn Bay City Riverfront, DoubleTree by Hilton Bay City Riverfront, and Courtyard By Marriott Bay City, totaling 350 rooms. Conversations with market representatives indicated that downtown lodging options are a strength of the market. This downtown lodging has enhanced the attractiveness of downtown Bay City and allowed the market to attract events and other activity.

Average daily rate and occupancy for Bay county hotels peak in the summer and reach their lowest point in January, consistent with many seasonal northern cities.



Youth & Amateur Sports Facilities

Although Bay County does not offer the extent of the youth and amateur sport facilities offered in Saginaw County, analysis suggests that Bay County is adequately supplied with facilities. The Dow Bay Area Family YMCA, which was completed in 2011, features a full gym in addition to two basketball courts, one pool and an indoor track. Defoe Park offers Bay County residents the most contiguous baseball/softball facilities and serves as home to Northwest Little League. Additionally, the Bay County Civic Arena offers two sheets of ice for hockey and skating purposes.



Defoe Park



Dow Bay Area YMCA



Bay County Civic Arena

Bay County - Youth Sport Facility Supply

Facility Name	Indoor / Outdoor	Diamonds	Multi-Purpose	Ice Sheets	Basketball	Volleyball	Tennis	Pool	Multi-Purpose (Indoor)	Track	Total
Dow Bay Area Family Y	Indoor	--	--	--	2	--	--	1	--	YES	4
Bay County Civic Arena	Indoor	--	--	2	--	--	--	--	--	--	2
Bay County Community Center	Indoor	1	--	--	--	--	--	1	--	--	2
Tri-City Sports Complex	Indoor	--	--	--	--	--	--	--	1	--	1
Veterans Memorial Park - Bay City	Outdoor	--	6	--	--	--	--	--	--	--	6
Bay Area Soccer Association Soccer Complex	Outdoor	--	5	--	--	--	--	--	--	--	5
Defoe Park	Outdoor	5	--	--	--	--	--	--	--	--	5
Carroll Park	Outdoor	--	--	--	--	--	4	--	--	--	4
Herbert Steih Park	Outdoor	4	--	--	--	--	--	--	--	--	4
Hewitt Park	Outdoor	1	--	--	1	--	2	--	--	--	4
Auburn City Park	Outdoor	2	--	--	--	--	--	--	--	--	2
Sovereign Field	Outdoor	1	--	--	--	--	--	--	--	--	1
Total		12	14	11	2	3	0	6	2	1	40

Source: GoGreat, Hunden Strategic Partners

Youth & Amateur Sports Facilities

The majority of youth and amateur sport facilities found in Bay County can be found in, and around, downtown Bay City. A few facilities, including Auburn City Park and the Tri-City Sports Complex are located west of Bay City in Auburn. The facilities in Auburn are not of tournament quality and size, however, these facilities are serviced by US 10 and halfway between Midland and Bay City. As both Midland and Saginaw Counties boast robust youth and amateur sport facilities, HSP does not believe there is major opportunity to bolster those offered in Bay County.



Tri City Sports Complex



Other Attractions

Bay City is home to the Antique Toy and Fire Truck Museum. Located 11 minutes north of Downtown Bay City, the museum features the largest collection of Tonka toys and trucks in the world. The museum also features 60 motorized fire trucks and the largest land-based fire trucks ever built. While the museum is a favorite among kids, conversations with local representatives indicated that the museum is hindered by accessibility. Signage for the property is not ideal and many visitors are not able to find the property.



Antique Toy and Fire Truck Museum

Bay County - Other Attractions

Name	Description
Antique Toy and Firetruck Museum	Largest collection of tonka toys and trucks in the world
Bay County Fairgrounds	Widely used recreation facility
Bay County Farmers Market	Farmers Market
Buoy 18 Miniature Golf, Arcade & Ice Cream Shop	Offers private parties
Delta College Planetarium and Learning Center	Features 11,000 SF of event space
Downtown Bay City Farmers Market	Farmers Market
Monitor Lanes	40 lane bowling center featuring 2 cocktail lounges, snack bar, pro shop
Painterly Pottery & Mi Art Studio	Features mosaic designing, fused glass design, and the region's largest pottery studio
Saginaw Valley Naval Ship Museum	Features USS Edson Destroyer
Studio 23 The Arts Center	Offers educational activities around the arts
Wenonah Park	Waterfront amphitheatre - and Santa's destination for the festival of lights
Wizgall Apple Orchard	Over 40 different types of apples

Source: HSP, GoGreat



Delta College Planetarium



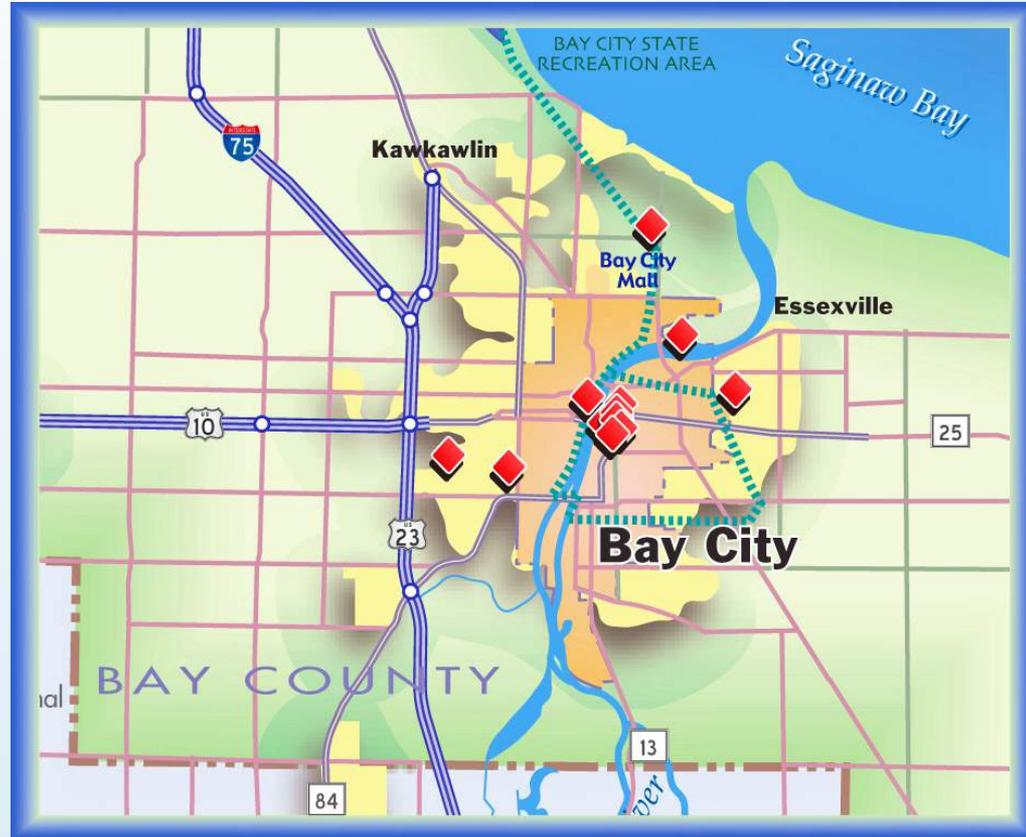
Naval Ship Museum

Other Attractions

Analysis of Bay County attractions, as well as conversations with local market stakeholders, suggests an opportunity to better utilize the water assets of the community. Bay County's greatest strength is the water and it should be maximized to its greatest potential. Local citizens are frustrated with lack of access to the Saginaw Bay as well as the Saginaw River. Development along the riverfront and bay presents an opportunity to increase visitation and tourism to the market.



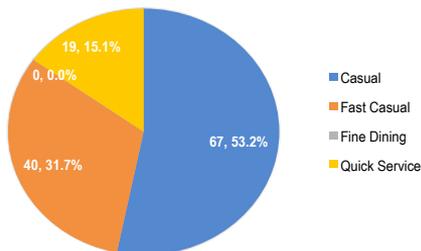
Saginaw River



Restaurant Supply

Analysis of the existing restaurant supply and conversations with local market representatives indicates that the collection of dining options offered by the market, specifically downtown, is a strength of the local market. Downtown Bay City has been able to establish itself as a destination for nightlife and activity for young professionals, more so than than Saginaw and Midland. The collection of unique, homegrown establishments has resulted in a vibrant downtown. Feedback from stakeholders indicated that while there are unique establishments in the market, there is significant opportunity to better utilize the area along the river for new dining and nightlife options.

Bay County Restaurant Inventory Breakdown



Source: GoGreat, Various Sites, Hunden Strategic Partners

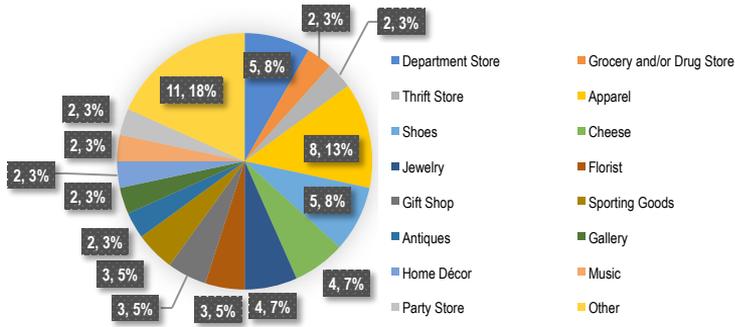


Retail Supply

Located just outside of the city limits near the intersection of Wilder Road and State Street Road is the main hub of suburban retail activity, anchored by the Bay City Mall, which opened in 1991 with Sears, Target, and Younkers. Due to competition from the larger Fashion Square Mall in northern Saginaw, which is only a 15-minute drive away, the Bay City Mall has struggled to keep some of its tenants but has added a few national retailers, even as Sears closed its doors. Bay City Mall replaced the 1975 Hampton Square Mall, which was vacated by most retailers in the 1990s and closed completely by 2010.



Bay County Retail Breakdown



Source: GoGreat, Various Sites, Hunden Strategic Partners

Recreation, Parks, and Nature Oriented Assets

Analysis of the parks and nature oriented assets of Bay County suggests a diverse supply of trails, parks, and recreation areas. Conversations with local representatives indicated that outdoor activities are generally well received within the community. The major hurdle facing Bay County, according to feedback from local stakeholders, is the lack of water access. There are minimal access points to the beaches and it is very difficult to rent boats on the bay. Already a summer destination due to the water and vibrant downtown, improving the water access is a vital next step to enhancing the destination appeal of Bay City, according to conversations with local stakeholders.

Bay County Parks, Nature, and Recreation Assets

Name	Description
Bay City Area Riverwalk/Railtrail	17.5-mile looping trail along west bank of Saginaw River
Bay City Boat Lines	Narrated Tours and private charter service
Bay City State Recreation Area	One mile of shoreline, campground, mini cabin, access to Tobico Marsh
Cattail Kayak Rental LLC	Recreational Kayak Rental on Saginaw Bay
Edward M. Golson Boat Launch	43 acres - nature area, two platforms, large gazebo
Infinity Skate Park	17,000-square foot skate park
Fraser Township Rail Trail	4-mile stretch of nonmotorized trail
Nayanqing Point	14,000-acre coastal wetland - hiking, fishing, birding
Pinconning Park	206-acre preserve - campsites, beach, kayaking, fishing
Quanicassee State Wildlife Area Habitat Management	1,922 acres - fishing
Saginaw Valley Public Golf Course	Open to public
Tobico Marsh	2,000 acres of wetlands, wet meadows, and marshlands
Veterans Memorial Park	Central park - Liberty Harbor Marina, Kantzler Arboretum, Santa House, and Trombley House

Source: Hunden Partners, GoGreat



Bay City Boat Lines



Pinconning Park

Recreation, Parks, and Nature Oriented Assets

The Bay City Recreation Area includes over 2,000 acres of land featuring woodlands, wetlands, marsh ponds, dunes and miles of shorelines. Currently the recreational opportunities which are offered include swimming, picnicking, camping, hiking, fishing, and bicycling. The park is a haven for migratory birds and wildlife, but pollution on the beaches bordering Saginaw Bay has presented issues in recent years. Enhancing these waterfront recreation areas should be a top priority for the market as it looks to improve its destination assets.



Festivals and Other Major Events

Bay City has hosted the Tall Ship Celebration, a series of races and rallies organized by Tall Ships America, six times since the year 2001, the most recent being 2016. Due to their success hosting the three-day event, Bay City has been awarded “Port of the Year” more times than any other community in the country.

Held annually on the Saginaw River near the Veterans Memorial Bridge in Bay City, the Bay City Fireworks Festival is an annual Independence Day celebration that features several days of fireworks, concerts, a carnival, boat tours, and other activities throughout the city.

Bay County Festivals and Other Events

Name	Description
St. Patrick's Day Parade Festival	March - features floats, marching bands, and leprechauns
Bay City River Roar	June - powerboat racing on Saginaw River
Bay City Fireworks Festival	July - 3-day event with carnival and live entertainment
Tall Ship Celebration	3-day festival, not annual
Hell's Half Mile Film and Music Fest	September - Indie films and live music over four days

Source: HSP, GoGreat



Tall Ship Celebration



Bay City Fireworks Festival

Conclusion and Recommendations

Based on an analysis of existing quality and supply of tourism generators throughout the local market, as well as conversations with community leaders and stakeholders throughout the county, HSP determined the following about the strengths, weaknesses, opportunity and threats of Bay County as it relates to the current tourism appeal of the county:

STRENGTHS:

Restaurant, Retail, Bar, Nightlife: Downtown Bay City has been able to organically create a destination of unique bars, restaurants, and nightlife that is a center of activity for visitors and residents alike.

Event Space Quality: The development of the flexible, high-quality DoubleTree by Hilton Bay City Riverfront in 2004 established Bay City as the destination for events in the Great Lakes Bay Region. The space is widely considered the top event venue in the market.

Events: While Bay City may not offer as many annual events as other counties in the region, the market has demonstrated a track record of success with major events, including the Bay City Fireworks Festival and Tall Ship Celebration.

WEAKNESSES:

Beaches/Bay Access: The primary frustration expressed from local stakeholders is the lack of access to the beaches and the Saginaw Bay. The water should be leveraged as the market's greatest asset, but is currently underutilized.

Waterfront Restaurants/Entertainment: Bay City offers a unique collection of dining options in various nodes throughout the city, but the city has failed to develop along the waterfront.

Lack of Major Event Venue: While Saginaw offers the Dow Event Center and Midland features Dow Diamond, Bay City does not offer a true entertainment venue capable of seating more than 600 attendees. The city has the infrastructure to support larger entertainment events, including hotels and walkable restaurants, but does not currently offer the facility to accommodate them.

Conclusion and Recommendations

OPPORTUNITIES:

Entertainment Venue: Analysis of the existing supply in the local and regional market indicates an opportunity for a flexible entertainment venue that can host concerts and other events.

Beach/Bay Development: Access to the Saginaw Bay could present a multitude of opportunities for new events or developments that could generate tourism and economic impact to the market.

Additional River Activity: By maximizing the riverfront, Bay City can enhance its already unique collection of restaurants and nightlife.

THREATS:

Water Quality: In addition to access, the water quality, both in the river and in the bay, has presented issues to residents of Bay City. This should be considered as future waterfront development occurs.

Conclusion and Recommendations

Based on the analysis provided in this chapter, HSP recommends that the following projects be considered for development to enhance the destination appeal and tourism visitation to Bay County. HSP also provides *aspirational* examples of similar to relevant development that have occurred throughout the country on the following slides.

Indoor/Outdoor Entertainment Venue: HSP recommends a dual indoor/outdoor concert and entertainment venue along the Saginaw River in Bay City. The water backdrop provides a unique setting for a multitude of events. The existing collection of restaurants and bars will support and benefit from increased visitation from events. The indoor/outdoor design of the complex will also allow the market to leverage its weather in the summer months, but also escape the colder climate throughout the winter. (See: Stage AE – Pittsburgh, PA)

Waterfront Restaurant Development: HSP recommends a riverfront development concept that includes bars, restaurants, and activity along the river in downtown Bay City. Residents and visitors enjoy a waterfront experience while dining or relaxing, and development along the river will enhance the attractiveness of downtown. (See: Chicago Riverwalk)

Water Activation/Harbor Concept: In addition to developing a water activation/harbor concept along the river, HSP recommends a water activation concept that enables greater access on the shoreline of the Saginaw Bay by both people and recreational equipment. This can be achieved through a pier concept, additional rental boating opportunities, water taxis, cruises, or harbor features that allow the public to interact and play on the water, both in the bay and on the river. (See: Baltimore Harbor – aspirational concept)

In addition to the primary recommendations above, HSP also recommends that the market focus on creating new, winter-themed events to extend the tourism season and drive room nights in non-peak months. This could include winter festivals that occur throughout the region and encourage visitors to frequent the various destinations in the Great Lakes Bay Region.

Stage AE – Pittsburgh, PA

Opened: 2010

Construction Cost: \$12 million

Indoor Capacity: 2,400

Outdoor Capacity: 5,500

Owned by: Pittsburgh Steelers & Continental Real Estate Cos.

Operated by: Promo West Productions & PGH Live Music

City of Pittsburgh Population (2015): 304,391

Allegheny County Population (2015): 1,230,459

Stage AE in Pittsburgh, PA is a multipurpose entertainment venue that doubles as both an outdoor amphitheater and indoor concert hall / club. The venue was developed in 2010 and sits adjacent to Heinz Field, home of the NFL's Pittsburgh Steelers. It is modeled after Express Live! which is located in Columbus, OH. Annually, the venue hosts more than 110 live music events as the indoor portion is open throughout the year while the outdoor amphitheater is open between May and November. The venue was developed at a cost of \$12 million, with approximately \$2.5 million coming from state tax revenue. Notable performers include Motley Crue, The Avett Brothers, Alice Cooper, Marilyn Mason, Wiz Khalifa, Mac Miller, Fall Out Boy and Lyle Lovett.

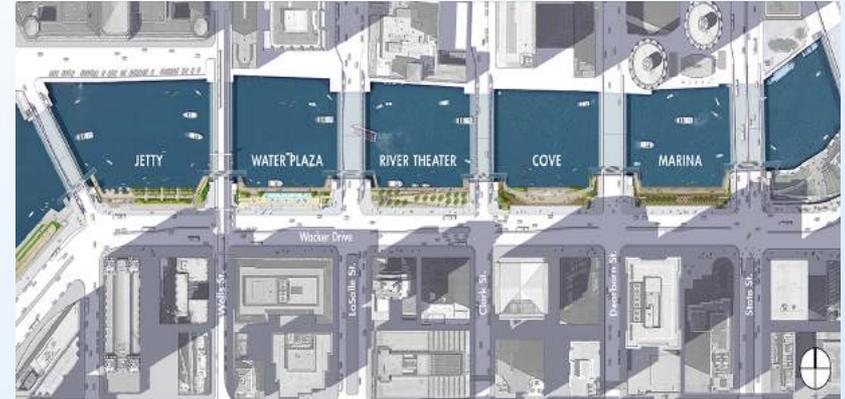


Chicago River Walk – Chicago, IL

The Chicago Riverwalk was initially part of the larger Wacker Drive Reconstruction Project, which was completed in three phases (I, II & III). The initial idea behind the project was to bring pedestrians down to the river, allowing them to walk continuously along it.

Phase I of the Chicago Riverwalk was completed in 2009 and runs west from Michigan Avenue to the east side of the State Street Bridge. This segment includes the Vietnam Veteran's Memorial as well as a limited number of restaurants and vendors.

The Riverwalk Extension, known as Riverwalk Phases II and III, was designed along a six-block section of Lower Wacker Drive along the southern bank of the Chicago River, running west from State Street to Lake Street. The project now offers pedestrians an alternative pathway that includes recreational, educational, retail and restaurant opportunities. Prior to the completion of the Riverwalk, there was not a continuous walkway along the river. Pedestrians were required to climb a flight of stairs, cross the street at Upper Wacker Drive and then descend another staircase to return to river level. Phase II of the Riverwalk was completed at the end of 2014 while Phase III was completed in 2015. Now, the Riverwalk provides a continuous pathway from Lake Street to the point where the Chicago River joins Lake Michigan.



Baltimore Inner Harbor – Baltimore, MD

The Inner Harbor Riverwalk is located in south-central Baltimore in the Inner Harbor neighborhood. Once an industrial port, the Inner Harbor development began after a successful urban renewal project in mid-town that led to the need for more transformative developments throughout the city. In 1963, the City of Baltimore, the Greater Baltimore Committee and Wallace-McHarg partnered to develop the 240-acre Inner Harbor into what it is today, with development funds consisting of two bonds of \$52 million and \$14 million, respectively; and \$47 million in federal funds. The Inner Harbor operates on a \$1 million annual budget, comprised of 40 percent public and 60 percent private funding. It is primarily managed, leased funded and marketed by a Business Improvement District, which was consolidated in 2007 at the recommendation of the Mayoral Advisory Commission.

Retail and dining at the waterfront are also two activities that have popularized the area among locals and visitors. On Pratt Street, Harborplace and The Gallery are two malls that offer national brand shopping, chain and independent dining and entertainment while along the river there are options that include gourmet dining. Baltimore's Inner Harbor also features a water taxi option that transports riders to 17 of the city's attractions including the aquarium, Pier Five, Fells Point and Canton Waterfront Park, among others.

Baltimore's example of mixing many attractions, museums, office, shopping, sports, convention halls, restaurants and entertainment along a common waterfront allows for visual sightlines to all the attractions from many locations. Baltimore congregated its many tourist attractions along the Inner Harbor where people would be naturally attracted and build off each other's success.



Additional Concepts – Bay County

Foodie Pop-Up Pedestrian Bridge

A downtown, multi-level pedestrian bridge with cafe tables, colored lights, food trucks, waterfalls that fall off ledges into lower levels or the river itself, and life-sized interactive sculptures could be considered. A wide bridge could be the home of many downtown festivals and special occasions, followed by fireworks. This urban foodie paradise could work well with any other attraction nearby. As a starter, a current bridge (photo below) could be used as a foodie-bridge, if closed to vehicular traffic. The following bridges are meant for inspiration. Photos of the other more elaborate bridges follow, and are located in Providence, RI, Cairo, Egypt, Gateshead, England, and Copenhagen, Denmark.



Sailboat / Powerboat Racing

A tall platform of bleachers and/or earthen berm or a large dock for witnessing races could be built on the shore. A Class 1 and Powerboat GPS Championship is not likely to come to Bay City, however, Michigan City, Indiana, hosts the Great Lakes Grand Prix. The Great Lakes Grand Prix is part of the Super Boat International offshore powerboat racing schedule and features many of the world's fastest and most powerful offshore power boats, speeding past spectators on the city's Washington Park beach at speeds nearing 150 miles per hour. A boat parade, block party, and Taste of Michigan City fill out the weekend, with beach activity being very popular.



Apple, Cherry & Blueberry Harvest Festival

As part of the festivities, arts and crafts using the fruits can have their own showings as part of the fair-like atmosphere. For fun, if the festival is in a rural area, it can sport an apple cannon, apple throwing, juggling exhibitions, and include a pair of mazes (possibly a corn maze), and live music. A neat gimmick: Give hot air balloon rides in a hot air balloon that looks like an apple or cherry.



FlowRider

The FlowRider experience is still new and uncommon in most of the U.S., particularly in cold climates. This can be operated in summer as an outdoor experience, or as an indoor year-round activity. The image below shows a 2015 model that is not installed in North America: the 180-degree wave. The FlowRider Double is more common and an economical use of space. The top photo to the right is the new FlowBarrel, which packs a visual punch and attracts lots of attention. Wave House is a company that creates entire off-beach surfing facilities, including restaurants, bars, and a gift shop. The only one that exists in the U.S. is in San Diego. This attraction would best be developed near a beach, adjacent to a water park or whitewater course.



Top Golf

Another cutting edge concept is Top Golf, a golfing destination that combines alcohol, food, golf and social interaction. Currently, Top Golf has 29 facilities operating in 15 states, with 11 facilities currently under construction and set to open within the next year. The idea behind this concept was to make golf “more fun.” In order to accomplish this, players hit microchipped golf balls into designated targets. The golf ball will immediately report statistics like distance and accuracy, allowing players to compete with one another. According to Top Golf, more than 26,000 people visited a given facility per day in 2016, with an average stay of two hours and an average party size of four people. The 18-34 age bracket made up more than 53 percent of all visitors with the 35-44 age bracket making up 16 percent of all visitors. Additionally, 68 percent of visitors were male and 32 percent were female. Perhaps the most telling statistic is that 37 percent of visitors are non-golfers, showing that Top Golf is effectively appealing to those with no golfing background or experience. Conversations with Top Golf representatives indicate that the company has very specific development site requirements, from both a location and demographic perspective. Competitive concepts are beginning to enter the market, thereby, suggesting additional opportunity for the market.



Cross Country Urban Skiing Festival and Lighted Ice Sculptures

Winter nighttime urban parks-and-street cross-country skiing and lighted ice sculptures festival, including a walk-through castle or ice cave, are popular visual experiences in the dark winter months. Several northern cities in Europe and North America have their own versions of this, and the Great Lakes Bay Region could organize their own as well. Fireworks, food, and a parade are common components of the attraction.



Interactive Sculpture Park

Some of the best attractions for families are those that are free of charge. Art and sculpture gardens are distinct, open, park-like settings for picnics, relaxing and playing. In addition to generating visitation, these parks present opportunities to get photos of your city out into the world through visitors' pictures on social media. Many parks are home to outdoor entertainment events and concerts, especially throughout the summer months.



Axe Throwing

Recreational axe, archery and knife throwing facilities are growing and gaining in popularity. Many facilities have opened in cities across the nation, and most recently two new facilities opened in Chicago. Axe throwing is being called the “modern day bowling” and also “like darts, but on steroids.” The room for a venue is set up like a miniature bowling alley with throwing lanes separated by chain link fences. The facility provides the axes as well as the training. They have no age limit, and the chain claims that the youngest patron so far has been between 9 and 11 years old. Axe throwing is quickly gaining in popularity with leagues forming around the country. The advantage of such a sport is that it can be played year round as well as combined with other sports such as archery and knife throwing. As this sport is in its infancy and growing, the Great Lakes Bay Region could be a pioneer by hosting local, regional and national competition events in order to also boost tourism. It could eventually be expanded to include an international competition.



Archery Tag

Created in 2011, Archery Tag is a new dodge-ball type of combat game in which two teams of five people play opposite one another in an arena separated by a “safe zone.” The game is played similar to dodgeball, but with bows and patented foam-tip arrows instead of balls. Arrows feature soft foam tips on the ends that look like giant marshmallow puffs to avoid injury. Five-spot targets are being defended by each team and scoring occurs when these spots are knocked out or when players are hit by an arrow. Typically located at churches, recreation centers, or archery complexes, Archery Tag currently has hundreds of locations throughout the United States and Europe.



Microbreweries

A microbrewery is defined as any independent brewer that produces less than 15,000 barrels of beer per year. Microbrewers generally serve their local market by providing craft beer to local distributors, retail storefronts and restaurants. In 2015, the number of operating breweries within the United States grew by 15 percent, totaling 4,269 breweries. Of those 4,269 breweries, more than 2,390 are microbreweries. Additionally, beer trails are becoming more popular throughout the United States as states seek ways to increase tourist visitation. Although no formal “beer trail” has been established in Michigan, such trails have appeared in cities across the country such as San Diego, Denver, Philadelphia, Brooklyn and St. Petersburg.



Chapter 3

Midland County Analysis and Recommendations

Midland County

Named for being near the center of the Lower Peninsula, Midland County became organized in 1855 and was established as a fur trading post of the American Fur Company. The area was home to trappers and small farming communities. The Dow Chemical Company was formed in 1897 in the city of Midland, where its world headquarters still reside as of today. Spinoffs Dow Corning Corporation and Chemical Bank are also headquartered in Midland. These companies were largely responsible for nearly doubling the population of the county between 1950 and 1975. The Dow family has been a leader in nurturing the city's cultural growth to help offer a high quality of life to the city, for the purposes of attracting the best and brightest candidates for employment, and then keeping them in Midland. The Dow family has assisted the city with building Dow Gardens and 72 city parks, seven of which are over 200 acres each, the new Civic Arena with three ice rinks, Dow Diamond ballpark, home of the area's only minor league baseball team, the Midland County Historical Society's Heritage Park, Dow Historical Museum, and the Midland Center for the Arts. The Midland Center for the Arts offers science, arts, and technology exhibits at the Alden B Dow Museum of Science and Art. Adjoining the center are two auditoriums housing the Midland Symphony Orchestra and Center Stage Theatre. The 5,500-seat Dow Diamond Ballpark in downtown Midland, opened in 2008.



Midland

A skate park, a unique three-ended pedestrian bridge, or “The Tridge”, annual festivals, a farmers market, renovated historic buildings along with new mixed-use projects and streetscaping have brought new life to the historic city core. As a result of efforts to revitalize downtown by the Downtown Midland Development Authority in the 1990s, downtown Midland won a 2005 statewide competition called Cool Cities, and earned a grant towards the revitalization of its downtown district. These efforts have been noticed by national media. Forbes Magazine rated Midland the 4th Best Small City to raise a family in 2010. The population of the city of Midland has plateaued at 42,200 for the past two decades, while the county's population has also leveled off at 83,600. Geographically, the county's residents outside of Midland live mostly in Beaverton, Coleman, and residential communities along Sanford Lake and Wixom Lake. U.S. 10 is the county's primary access highway, running northwest to southeast. State highway 20 connects westward to Mount Pleasant. The county is home to many parks, including the Pere Marquette Rail-Trail, which now connects Clare, Michigan to downtown Midland, runs 30 miles across the county and features a Solar System sculpture. Sanford Lake Park has a popular beach, with forested picnic pavilions and a disc golf course.



Convention, Conference, and Meeting Facilities

Analysis of the Midland meetings and events supply indicates a lack of event space in downtown Midland. Located six miles east of Midland, the Great Hall Banquet and Conference Center is the largest event venue in the market, featuring 9,000 square feet of ballroom space and five breakout meeting rooms. According to conversations with local stakeholders, the H Hotel, located in downtown Midland, is the primary meeting and event venue in the market. The Midland Center for the arts, profiled later in this chapter, also provides unique event venues to the market.

Facility	City	Total Function Space (SF)	Exhibit Space (SF)	Ballroom Space (SF)	Meeting Space (SF)	Breakout Rooms	Walkable Hotel Rooms
Great Hall Banquet & Convention Center	Midland	12,657	--	9,942	2,715	5	151
Midland Country Club*	Midland	6,330	--	4,500	1,830	5	--
Holiday Inn Midland	Midland	6,166	--	5,760	406	1	180
The H Hotel	Midland	6,155	--	3,900	2,255	8	131
Midland Center for the Arts*	Midland	--	--	--	--	--	--
Average	--	7,827	--	6,026	1,802	5	154

* Room sizes estimated off of room capacities
 Source: Various Event Facilities, Hunden Strategic Partners



Great Hall Banquet and Convention Center



Midland Center for the Arts

Convention, Conference, and Meeting Facilities

Located on Main Street and overlooking the Tittabawassee River, the 131-room H Hotel features 3,900 square feet of ballroom space and 2,200 square feet of meeting space. Considered to be the highest quality event venue in the market, conversations with local stakeholders indicated that not only is the complex limited by its size, but availability is very difficult to come by due to consistent demand generated by Dow Chemical at the property. Analysis of the meeting and event supply suggests a market opportunity for additional function space in the Midland market.



Arena, Sports & Entertainment Facilities

Midland County's largest entertainment venue is Dow Diamond, a minor league baseball stadium. The MLB's Great Lakes Loons are the anchor tenant at the Dow Diamond and annually draw more than 200,000 fans. Feedback from local stakeholders indicated that the facility is very well received within the community, but suffers from a lack of connectivity to downtown. Additionally, the Midland Center for the Arts (MCFTA) is located in Midland County. Located just north of downtown Midland, the MCFTA offers a 1,500-seat auditorium that is utilized for Broadway shows, choirs, symphonies, and dance events. The center also offers a 400-seat theater that is typically utilized for center stage events. The MCFTA, which also features the Alden B Dow museum of Science and Art, is considered the top overall performance venue in the market. While the venue is the hub of the performance and artistic community, conversations with local representatives indicated that the building would benefit from aesthetic improvements.

Midland County - Entertainment Venues

Facility Name	Venue Type	Capacity
Dow Diamond	MiLB Baseball	5,200
Currie Stadium	Softball	2,717
MCFTA - Auditorium	Theater - Music	1,500
MCFTA - The Little Theater	Theater - Music	400
Average		2,454

Source: Hunden Strategic Partners



Midland Center for the Arts



Dow Diamond

Arena, Sports & Entertainment Facilities

Feedback from conversations with local groups indicated that the arts and cultural assets of the community, including the Midland Center for the Arts, present a competitive market strength relative to its peers and should continue to be leveraged more consistently moving forward.

Analysis of the existing entertainment venues in the Midland market suggests a strong supply of dynamic indoor and outdoor venues. HSP believes that there is no major market gap for a new entertainment development in Midland at this time.



Currie Stadium



Hotel, Resort, Waterpark and Other Lodging

Similar to downtown Saginaw, Midland suffers from a lack of lodging options downtown. Other than the H Hotel, the closest properties of significant quality are nearly three miles away. In addition to being the primary destination for meetings and events in the market, the H Hotel, a Dolce conference hotel built in 1993, is the highest quality lodging option in the area. The only two other upscale properties in the Midland market are the SpringHill Suites and Residence Inn Midland, located three miles from downtown. The average age of the properties in Midland county is 27 years, and no properties have opened in the last five years. Consistent with the event demand, the H Hotel is the primary home for The Dow Chemical Company's overnight guests.

Midland County Lodging

Property	Distance from Downtown Midland	Rooms	Chain Scale	Opened
The H Hotel	0.2	130	Upper Upscale	Jul-93
Midland Inn	1.8	73	Indep	Jun-64
Nada Hotel & Conference Center	1.9	31	Indep	Jan-71
Sleep Inn Midland	2.7	77	Midscale	May-97
Baymont Inn & Suites Midland	2.8	91	Midscale	Sep-86
Holiday Inn Midland	3	180	Upper Midscale	Jun-09
Hampton Inn Midland	3	87	Upper Midscale	May-98
SpringHill Suites Midland	3.1	96	Upscale	Jul-08
Residence Inn Midland	3.2	67	Upscale	Dec-11
Days Inn Midland	4	60	Economy	Jun-85
Best Western Valley Plaza Inn	4.1	151	Midscale	Jun-65
Total/Average	2.71	1,043	--	Mar-90

Source: STR, Hunden Partners



SpringHill Suites Midland



Residence Inn Midland

Hotel, Resort, Waterpark and Other Lodging

Other than the H Hotel, the primary node of hotel properties surround the Midland Mall, located three miles north of downtown Midland at the intersection of US-10 and Eastman Road. Conversations with local stakeholders indicate that the walkability of Midland presents challenges. There are various pockets of activity throughout the market, but the area feels disconnected and does not offer the sense of place that Bay City features. In addition, the lack of a true headquarters hotel was expressed as a frustration by local stakeholders. The lack of available lodging options downtown prevents the market from potentially attracting impactful events to Midland.



H Hotel Midland



Youth & Amateur Sports Facilities

Known as a youth softball and baseball destination, Midland County boasts some of the finest youth and amateur athletic complexes in the region. The 12 field Midland Soccer Complex allows large scale soccer tournaments to be hosted within the region and the 10 diamond Redcoat Softball Complex allows the region to host large scale softball tournaments throughout the season. Midland County is also home to two ice sheets within the Midland Civic Arena. Midland County is also appealing to the tennis enthusiast as the Greater Midland Tennis Center houses 32 courts. The area has been named USA's First Tennis Town.



Midland Soccer Complex



Redcoat Softball Complex



Midland Civic Arena

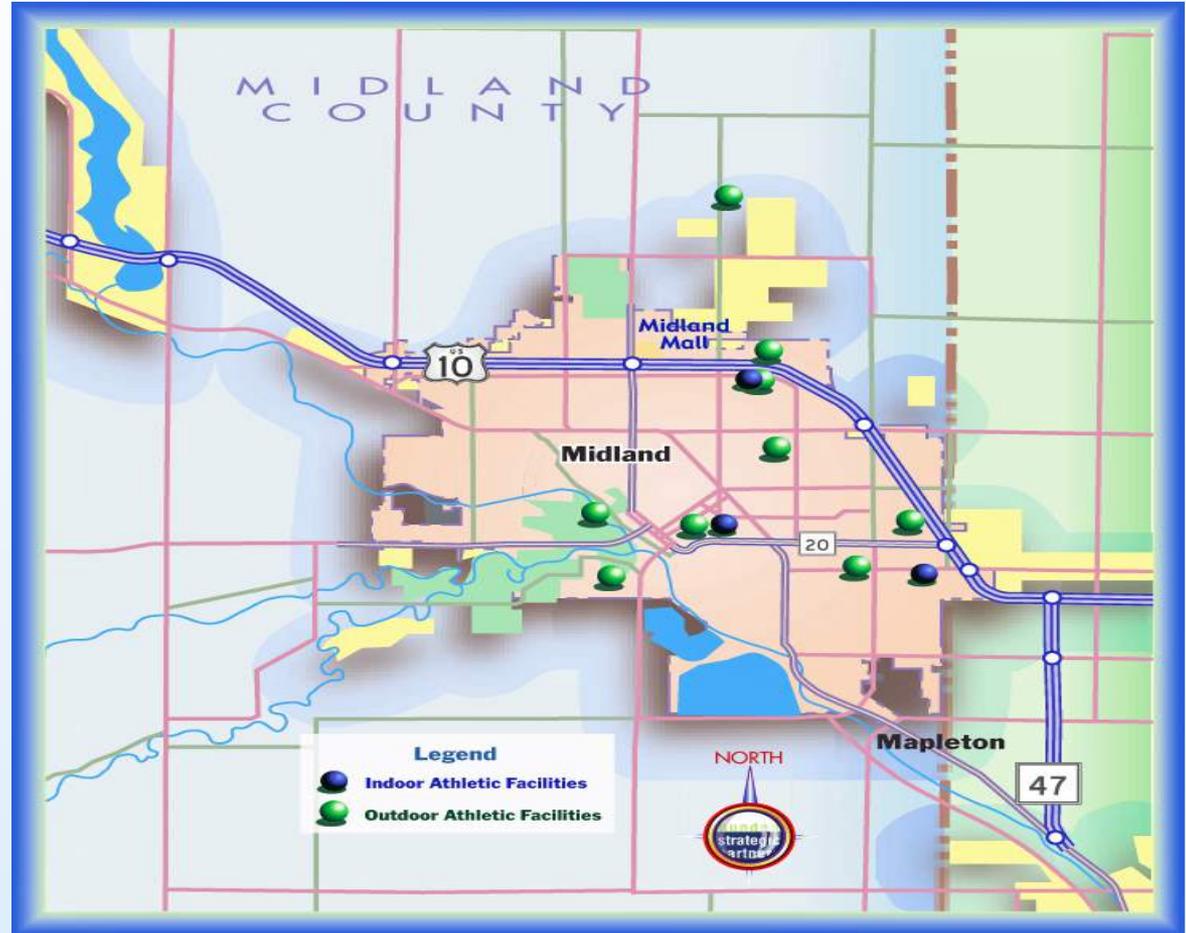
Midland County - Youth Sport Facility Supply

Facility Name	Indoor / Outdoor	Diamonds	Multi-Purpose	Ice Sheets	Basketball	Volleyball	Tennis	Pool	Multi-Purpose (Indoor)	Track	Total
Greater Midland Tennis Center	Both	--	--	--	--	--	32	--	--	--	32
Greater Midland Community Center	Indoor	--	--	--	3	6	--	2	--	YES	12
Midland Civic Arena	Indoor	--	--	2	--	--	--	--	--	--	2
Midland Soccer Complex	Outdoor	--	12	--	--	--	--	--	--	--	12
Redcoat Softball Complex	Outdoor	10	--	--	--	--	--	--	--	--	10
Central Park	Outdoor	--	--	--	--	--	7	--	--	--	7
Emerson Park	Outdoor	3	--	--	--	1	--	--	--	--	4
Stratford Woods Park	Outdoor	--	--	--	--	4	--	--	--	--	4
Sunrise Optimist Park	Outdoor	4	--	--	--	--	--	--	--	--	4
Northwest Little League Complex	Outdoor	3	--	--	--	--	--	--	--	--	3
Northeast Little League Complex	Outdoor	2	--	--	--	--	--	--	--	--	2
Total		11	22	12	2	11	39	2	0	1	92

Source: GoGreat, Hunden Strategic Partners

Youth & Amateur Sports Facilities

Midland County sits in an attractive location for all youth and amateur sport participants as the city of Midland is bisected by US 10. Such highway access allows for easy access to all of the sports facilities in Midland. A high concentration of facilities are located just off US 10. Additionally, some facilities are located in, or around, the downtown area including the Greater Midland Community Center and Emerson Park.



Other Attractions

Midland features a collection of unique attractions, including the Santa House. The largest Santa house in the world, the house is part of a variety of Santa and Christmas-themed activities that occur in Midland throughout the holidays.

The Dahlia Hill Society of Midland is a protected garden area that encompasses 1.4 acres of terraced gardens in Midland. Each year, the non-profit organization that runs the venue plants more than 3,000 dahlia plants of more than 250 varieties. There is no honorary fee associated with membership to the society, but members must commit to work at least 15 hours at the garden and attend bi-annual meetings. The goal of the society is to educate others about dahlias and showcase them in a garden setting.

Midland County - Other Attractions

Name	Description
Alden Dow Home & Studio	Mid 20th century architecture building
Dahlia Hill Society of Midland	Facility showcasing a variety of dahlias that are planted annually
Midland Center for the Arts	Great Lakes Bay Region's home for the arts
Midland County Fairgrounds	100 acres of indoor and outdoor facilities
Santa House	Leased by Santa school every October
The Roll Arena	One of Michigan's premier rinks

Source: HSP, GoGreat



Dahlia Hill



Santa House

Other Attractions

The Alden B. Dow Home and Studio, the former home and studio of 20th century Architect Alden Dow, is located adjacent to Midland Center for the Arts and Dow Gardens. Declared a National Historic Landmark in 1989, the home is listed as one of the top 25 best historic homes in America by Traditional Home Magazine. The home exemplifies how this masterful architect weaved structure and nature into the living environment.

Conversations with local stakeholders indicated that Midland offers a unique collection of natural and artistic assets, but there is opportunity in the market for additional water access and activity, specifically attractions on Sanford Lake.



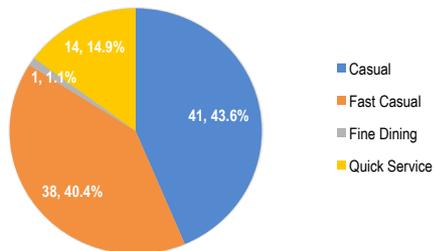
Alden B. Dow Home and Studio



Restaurant Supply

Analysis of the Midland restaurant supply and conversations with local stakeholders suggests a significant opportunity for an improved dining district downtown. Midland currently lacks the unique, homegrown collection of dining options that Bay City offers. The market does not offer the nightlife, activity, and walkability that young professionals and leisure travelers are looking for. Conversations with local stakeholders indicated that residents are leaving the market and heading to Detroit or East Lansing on the weekends to find food, beverage, and entertainment.

Midland County Restaurant Inventory Breakdown



Source: GoGreat, Various Sites, Hunden Strategic Partners

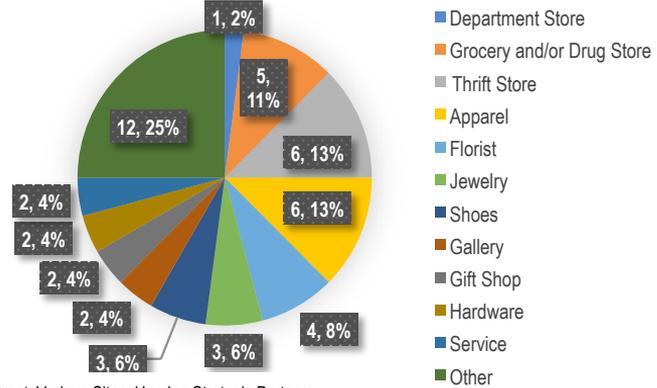


Retail Supply

There is a suburban shopping district with a 50-store indoor shopping mall, anchored by JCPenney, Younkers and Target on the northern side of the city near the U.S. 10 freeway interchange with Eastman Avenue. It is the smallest of the three malls in the Great Lakes Bay Region and uncertainty surrounds the future of the property, according to conversations with local stakeholders. There is frustration among the local community regarding the current shopping options in the market, specifically in downtown Midland.



Midland County Retail Breakdown



Source: GoGreat, Various Sites, Hunden Strategic Partners

Recreation, Parks, and Nature Oriented Assets

According to conversations with local stakeholders, nature and outdoor recreation are considered to be the foundation from which Midland's tourism appeal is built on. The market provides a variety of unique natural assets, including Dow Gardens, the Chippewa Nature Center, and the Pere Marquette Rail Trail.

The Tridge is the name of a three-way wooden footbridge spanning the confluence of the Chippewa and Tittabawassee Rivers in Chippewa Park in Midland. It is considered an iconic part of the local market and a key tourist attraction within the city; the Tridge opened in 1981.



The Tridge

Midland County Parks, Nature, and Recreation Assets

Name	Description
Chippewa Nature Center	120 acres - 15 miles of trails, visitor center, wetlands
City Forest	520 acres - two trail systems
City Loop Trail	2.8 mile trail
Dow Gardens	110-acre botanical garden - walking trails and greenhouse
Fasan Jager Upland Preserve	Hunting and dog training
Ike's Mobile Kayak Rentals	Guided or on-your-own tours
Pere Marquette Rail Trail	30-mile long, 14-foot wide trail
Pine Haven Recreation Area	325 acres - skiing, hiking, mountain biking
Sanford Lake Park	Disc golf course, spray park, swimming, boating
The Tridge	Three-legged footbridge spanning the Forks

Source: Hunden Partners, GoGreat

Recreation, Parks, and Nature Oriented Assets

Dow Gardens is a 110-acre botanical garden located just north of downtown Midland. The garden, open to the public, features a multitude of walking trails, greenhouses, and more than 1,700 varieties of plants. In 2018, the Whiting Forest will be opening as part of the garden. The 54-acre forest will include a 2-acre orchard as well as a 1,400-foot canopy walk, the longest in the nation. Conversations with market stakeholders indicated that Dow Gardens is the primary destination asset of Midland. HSP analysis suggests that the entrance to the garden, somewhat hidden, should be welcoming to the general public. The garden is a unique asset that establishes Midland as a destination for nature and outdoor recreation.



Dow Gardens



Festivals and Other Major Events

Northwood University International Car Show is the largest outdoor new car show in North America. The event features both domestic and imported vehicles and also includes an after-market display of vehicle accessories and components. The event is free of charge to the public and the show attracts over 60,000 visitors. The event is celebrating its 53rd year.

The Michigan Antique Festival is held three times a year and includes nearly 1,000 antique dealers showcasing vintage goods, antiques, collectibles and more. It is held at the Midland County Fairgrounds.

Analysis of the existing events and conversations with local stakeholders indicated that there is additional opportunity for more organic events in Midland, as well as events in the winter months.

Midland County Festivals and Other Events

Name	Description
Maple Syrup Day	March - pancake breakfast and tree-tapping
Michigan Antique & Collectibles Festival	June/July/September - more than 80 acres and 1,000 vendors
Northwood University International Auto Show	October - run by students, more than 500 vehicles
Midnight on Main	December - New Year's Eve Celebration - ball drop

Source: HSP, GoGreat



Northwood International Car Show



Michigan Antique and Collectibles Festival

Conclusions and Recommendations

Based on an analysis of existing quality and supply of tourism generators throughout the local market, as well as conversations with community leaders and stakeholders throughout the county, HSP determined the following about the strengths, weaknesses, opportunity and threats of Midland County as it relates to the current tourism appeal of the county:

STRENGTHS:

Corporate Presence: The presence and community involvement of a major corporation such as The Dow Chemical Company presents a strong economic foundation from which to build. The Dow Chemical Company has continued to enhance the area's growth, specifically culturally and artistically, to attract and retain talent, and this has benefitted the community at large.

Outdoor Entertainment: Dow Diamond offers a dynamic outdoor entertainment venue that is well-received within the local community. The size and scope of the complex complements the more intimate indoor entertainment options at the Midland Center for the Arts.

Arts and Culture: The Midland Center for the Arts, Dow Gardens, The Tridge, and Alden B. Dow Home and Studio form a package of unique cultural and artistic assets that have come to define tourism in Midland. These assets should continue to be leveraged as Midland establishes itself as a cultural destination.

Outdoor Sports: Considered a destination for softball and soccer events, Midland offers venues of the size and quality of to attract events and tournaments that generate room nights and economic impact in the community.

WEAKNESSES:

Connectivity of Assets: While Midland offers a collection of unique assets that, by themselves, generate tourism and visitation to the area, the nodes of activity are disconnected. This can present challenges to both visitors and residents of the community.

Restaurants/Bars/Entertainment/Nightlife: Downtown Midland does not currently offer the collection of restaurants, bars, nightlife, entertainment, and lodging in a downtown walkable environment that young, 25 to 35 year old leisure travelers are looking for. Young professional are leaving the market to find entertainment options.

Conclusions and Recommendations

WEAKNESSES (cont'd):

Lack of Event Space and HQ Hotels: The H Hotel is the only significant quality meeting space or hotel in downtown Midland. Consistently booked by The Dow Chemical Company, the venue lacks the size and availability to truly impact the market. Due to the lack of a sizeable venue and lodging option, Midland is not able to attract events to the market that generate foot traffic and support local restaurants and nightlife.

OPPORTUNITIES:

Impactful Events: Midland offers a unique collection of assets that meeting planners are looking for in a destination for events, but does not offer the venue or headquarters hotel. This is a significant opportunity for the market.

Leisure Travel: Midland is not currently viewed as a destination for activity and entertainment. Pockets of attractive destinations exist, but the market lacks the critical mass of options to generate significant visitation. Connecting and enhancing these nodes will improve the appeal of Midland and enhance the ability to efficiently visit and tour the area.

Sanford Lake: Feedback from local stakeholders in the community indicated that Sanford Lake, a man-made reservoir located 15 minutes northwest of downtown, is underutilized. This presents an opportunity for enhanced water recreation in the community.

THREATS:

Dow Chemical: While the presence and involvement of Dow Chemical Company has provided immeasurable benefits to the community, the dominance of one corporation in a community presents significant risk if there is a relocation or industry downturn.

Midland Mall: The uncertainty surrounding the Midland Mall presents concerns to the community about the future of retail and shopping in the market.

Conclusions and Recommendations

Based on the analysis provided in this Chapter, HSP recommends that the following projects be considered for further analysis to enhance the destination appeal and tourism visitation to Midland County. HSP also provides *aspirational* examples of similar to relevant development that have occurred throughout the country in the following slides

Downtown Conference Facility: A flexible, flat-floor conference facility featuring a large ballroom space and breakout meeting rooms would allow Midland to attract events that generate room nights, support downtown retail and restaurants, and generate economic impact. A new facility would complement the H Hotel and potentially allow The Dow Chemical Company to host larger events in the market. (See: Durham Convention Center).

HQ Hotel Development: In order to enhance the event package of Midland, a new event complex must be developed with an adjacent or connected hotel. Downtown Midland does not currently offer the lodging supply to support a new event facility development and meeting planners will expect available, walkable lodging options. (See: Hilton Garden Inn and Bancorp South Conference Center).

Connecting Cultural Trail: HSP recommends the consideration of a connecting cultural trail in Midland. Enhancing the walkability and ease of access between nodes of activity in the market will increase the destination appeal of the market, as well as provide Midland with another outdoor recreation option. (See: Indianapolis Cultural Trail).

In addition to the primary recommendations above, HSP recommends the consideration of development on Sanford Lake to better utilize the water assets of the community. This could be achieved through a marina development or an attraction, such as a floating Aqua Park Concept. In addition, Midland is home to a variety of cultural and artistic attractions, but there is frustration among residents that there is a limited opportunity to market their skills. HSP recommends that Midland consider artistic events to provide more outlets for local artists to showcase their talents. Finally, additional events throughout the winter are recommended to extend the tourist season. These events could leverage the existing Santa House in the community.

Durham Convention Center – Durham, NC

Opened: 1987

Total Square Feet: 33,000

Construction Cost: n/a

Owned by: City of Durham

Managed by: Spectra

City of Durham Population (2015): 257,636

Durham County Population (2015): 300,952

The Durham Convention Center is located in downtown Durham, NC and is part of the larger Durham Civic Center Complex that also includes the Carolina Theater, Durham Armory, Durham Arts Council Building and the 190-room Durham Marriott City Center. The convention center offers 33,000 square feet of function space including the 15,000 square foot Grand Ballroom, 11,500 square foot Junior Ballroom, 3,800 square feet of meeting rooms and 877 square feet of boardroom space. The center offers on-site catering services as well as audio, visual and sound equipment. In 2005, the city approved a \$110 million bond referendum to renovate Durham's public facilities. The convention center, being one recipient, received \$9.7 million toward renovations. Primarily, renovations to the facility included the replacement of old systems such as air conditioning, added functionality such as new ballroom divisions, as well as added new finishes and décor inside of the building.



Hilton Garden Inn and Bancorp South Conference Center - Tupelo, MS

Opened: 2006

Construction Cost: \$22 million

Owned by: City of Tupelo

Operated by: BancorpSouth Conference Center & Arena

City of Tupelo Population (2015): 35,680

Lee County Population (2015): 85,300

The BancorpSouth Conference Center is located between the 10,000-seat BancorpSouth Arena and the 158-room Hilton Garden Inn in Tupelo, Mississippi. The hotel and conference center were developed simultaneously as part of a larger \$22 million downtown revitalization project that also included a new City Hall and the Tupelo Automobile Museum. The Hilton Garden Inn owners have also leased the conference center from the City and control the booking of that facility. The existence of the conference facility makes the Hilton Garden Inn effectively a full-service hotel, although it does not include a full-service restaurant or room service.

The conference facility features one large conference hall spanning 10,232 square feet and although there are no stand-alone meeting rooms, the ballroom is divisible into six smaller rooms allowing for the venue to be formatted to include breakout meeting rooms



Indianapolis Cultural Trail, Indianapolis, IN

The Indianapolis Culture Trail is an eight-mile urban bike and pedestrian path located in downtown Indianapolis. The trail intends to connect neighborhoods, cultural districts and entertainment districts while doubling as a hub for Central Indiana's greenway system, which is an initiative to revive Indiana's hiking, biking and walking trails.

The Cultural Trail was funded through a public-private partnership between the Federal Government, Central Indiana Community Foundation and the City of Indianapolis, as well as several not-for-profit organizations geared toward the betterment of the City of Indianapolis. The trail is managed by the Indianapolis Cultural Trail, Inc. (ICT, INC.), which is a nonprofit organization.

Development of the Cultural Trail first took off in 2007 after \$15 million had been donated by Eugene and Marilyn Glick. Additional funding came in the form of a \$20.5 million grant from the US Department of Transportation in 2010. This \$20.5 million was awarded through the Transportation Investment Generating Economic Recovery Grant (Tiger Grant). The seven year process culminated with the opening of the Indianapolis Cultural Trail in May 2013.



Additional Concepts – Midland County

Artificial Whitewater Course

Complimenting Michigan's outdoor natural sports enthusiast brand, a man-made whitewater course for both team training and public enjoyment would be a way for the Great Lakes Bay Region to insert itself into the state's natural extreme sports agenda. If this whitewater stream were opened and built along with other attractions, such as a refrigerated toboggan and bobsled-style run (for winter), zipline and treetop aerial adventure, then a remarkable exciting attraction would set this area apart from other attractions in other cities. Midland already has toboggan runs, so this could be a fit if it were placed within walking distance.

There are two kinds of courses: the linear course and the circular course. A long linear course is recommended, however, a circular course works well on a more level landscape.

In the U.S. there are only seven artificial whitewater raceway courses. The nearest is in South Bend, IN, and in Wausau, WI. The East Race Waterway in South Bend is powered by a diversionary channel of the St. Joseph River and allows for 500 cubic feet per second of water to flow through the course. Wausau is actually part of the Wisconsin River and is released by a dam and allows for 650 cubic feet per second. If no sufficient river elevation change is available, pumps can create loop courses, which are how Olympic whitewater centers typically are built.



Floating Water Park

A new concept in water activities, developed by a German company called Wibit, is building floating waterparks, using interchangeable floating pieces. The inflatable waterparks include a walkable course that has slides, tunnels, trampolines, half pipes and other unique parts. The entire park would be accessible to people of all ages, including toddlers. Wibit has built similar parks throughout Europe, South America, Africa and Asia. Currently there are new parks located off various coasts of Florida, including the Gulf Coast, however, the only one in the remainder of North America is being constructed for \$300,000 in Whiting, Indiana on Lake Michigan. The different pieces can be reorganized each year, as they would be anchored to the bottom of the lake. They are similar to obstacle courses with components like monkey bars, wobble bridges, and inflatable domes people can bounce off of, launching themselves into the lake. Kayaks and paddleboats can accompany these floating waterparks.

A typical park would be able to accommodate 120-140 people at a time with an all-day pass likely to cost \$10 to \$12. This concept could be considered to activate Sanford Lake in Midland County.



Household Items Art & Fashion Quest

Midland could stage festivals that have fun with some of the products that are/were iconic staples of The Dow Chemical Company. A plastic water bottle boat exhibition and paddle race, an art show and a fashion show featuring Saran Wrap or bubble wrap, and other clever re-uses for Dow products would be the common theme.



Large-scale Open Studio Tour Weekends

Similar to makerspaces, artists lofts and studios can be fairly inexpensively (compared to conversion to offices or residential units) sealed and converted from old schools, warehouses and factory buildings. A typical artist studio maybe 500 to 1,500 square feet, have a window(s) for lighting, heat and electricity. Otherwise it is an open space for creating.

An urban trend that has been around for 30 years and is still gaining popularity is the Open-Studio Tour. Tours can be monthly, such as a “First Friday Nights” series, or seasonal, with a special weekend each year organized as the open-studio weekend. Northeast Minneapolis currently operates the largest annual open-studio tour in the U.S., called Art-a-Whirl, and over a three-day weekend, tens of thousands of people visit the studios of over 700 artists’ lofts in dozens of buildings. Artists that do not have their own spaces may rent space from another artist that is already in the building, or show their works in the hallways or in trucks outside of the buildings. Food trucks are parked outside the buildings and vendors and musicians line the hallways in strategic areas, all organized by an association of the artists and building managers. Local craft beer pop-up sites can also be popular at these open-studio tours.



Mini-Golf: Can Can Wonderland

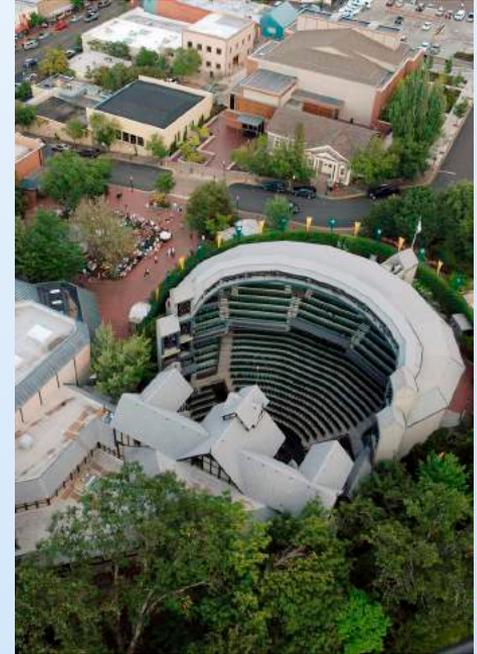
Mini-golf by itself is not an attraction that will induce long-distance visitation. However, inventive new takes on miniature golf, bolstered by new theming, shows, food, and clever colorful moving parts, are generating tourism and visitation throughout the country. Located inside a repurposed two-level warehouse in an industrial part of St. Paul, Minnesota, Can Can Wonderland uses old metal barrels, local theming, waterways, working models of things like Ferris Wheels, robots, and buildings in its mini golf design. The building also features a large eating area, creative and colorful adult cocktails, craft beers, a stage for nightly entertainment, and a wall of old-school pinball machines. The building offers space specifically designated for local artists to display new pieces and ideas. Everything within the complex is unpretentious, humorous, artsy, smart, and accessible. Can Can Wonderland is a one-of-a-kind project that could be done in the Great Lakes Bay Region in an old warehouse or factory building with its own unique local flair. The attraction is whimsical and word is spreading fast through the artistic community, despite only having been open since February 2017.



Shakespeare Festival

In Ashland, Oregon along Interstate 5 and in the mountains of the southern part of the state, the Oregon Shakespeare Festival is a regional repertory theatre producing 11 productions on three stages between mid-February and early November. It began in 1935 and produces not only Shakespeare productions, but over 340 non-Shakespeare plays since 1960. From 2001 to 2015, over ten million visitors attended plays held in one outdoor theater and two indoor venues. Each year the trio of theaters see about 410,000 patrons witness 750 to 800 performances. In 2013, 108,388 individuals bought 407,787 tickets, seeing an average of 3.76 plays each. Of these, 92,234 people were visitors to the area spending \$54,534,565, excluding their theater tickets. Added to the \$32,233,543 in actual festival expenditures, the direct contribution to the local economy in 2013 was \$86,768,108. The theaters campus sits on about four acres adjacent to a city park. The Allen Elizabethan Theatre is the large outdoor facility that resembles Shakespeare's Globe Theatre in 1599 London, where a covered multi-story section of seating surrounds an open seating courtyard and thrust stage. The two indoor theaters are smaller, however they allow for a variety of plays each day and at many times throughout the day, thereby increasing the festival's capacity significantly.

Midland could capitalize on its arts heritage by presenting a similar multi-month festival. The Midland Center for the Arts could be a venue for such a festival. However, something that the Oregon site does, which is very popular, is stage outdoor plays at dusk on a special landscaped plaza that is open and free to the public. This is done most evenings of the week. This type of open-to-all stage experience could bring people into the downtown area by placing this plaza in the park near downtown just one block from Main Street. The plaza hosting the free plays can be seen in the aerial photo of the theater campus.

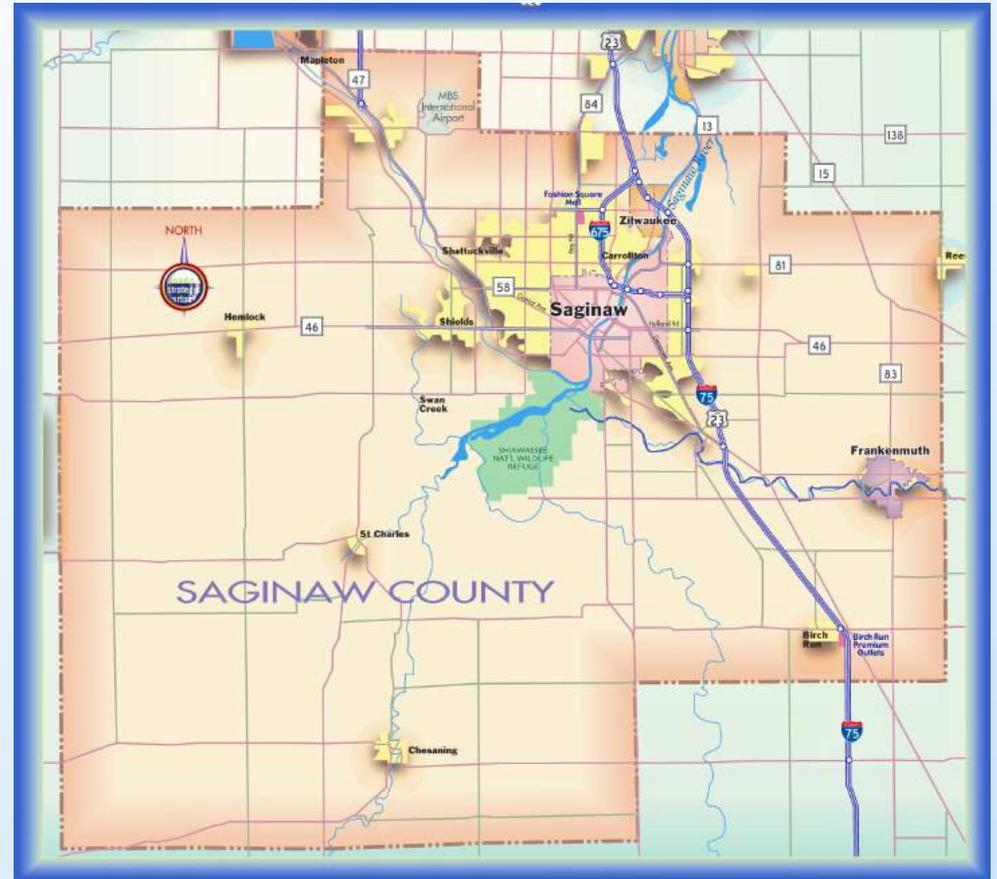


Chapter 4

Saginaw County Analysis and Recommendations

Saginaw County

Saginaw County is the most populated county of the three in the Great Lakes Bay Region with just under 200,000 people, or just over half of the total for the area. Interstate 75 is the primary transportation route, however, Michigan Highway 46 runs east/west through the county. The Shiawassee National Wildlife Refuge is situated where the Saginaw River is created by the confluence of the Shiawassee River, Tittabawassee River, Bad River, Cass River, and Flint River. Saginaw Valley State University, with 10,220 students, Delta College, with 17,000 students, and Northwood University, with 5,000 students, are the largest institutions of higher learning in the area. The county is also home to MBS International Airport.



Saginaw

Saginaw is the northernmost significant industrial city in Michigan. It is also the largest city in the metropolitan area with about 50,000 people within the city limits and 126,000 in the urbanized area. The area was organized as early as 1830. In the years following the Civil War, a timber boom attracted another 70,000 people to the county. The two cities of East Saginaw and West Saginaw combined in 1889, boosting the population from 10,500 to 46,322. The population eventually reached 98,265 in 1960, just prior to the decline of the industrial age.

As many as twelve General Motors plants operated in Saginaw, and during World War II, were utilized in military production. Most of those factories are closed today and/or demolished. Currently, the two largest employers, by far, are Nexteer Automotive, employing 4,200, and Covenant Health Care, with 4,129 employees.



Frankenmuth

Frankenmuth is a small city of about 5,000 people southeast of Saginaw. It is home to Bronner's CHRISTmas Wonderland, which bills itself as "the World's largest Christmas Store", as well as Zehnder's and the Bavarian Inn restaurants, and the Frankenmuth Brewery.

Settled in 1845 as a German Lutheran mission colony, the community became a village in 1905 and a city in 1959. Because of this heritage, the architecture of the town mirrors that of Franconia, in the Kingdom of Bavaria, Germany, and other towns in that area.

According to officials, millions visit each year and are drawn to this city to see the architecture, shops and restaurants, hotels, landscaping, waterfalls, and streets that feature Bavarian and Christmas themes. Aside from tourism, the town's top industry is agriculture.

Six major festivals occur annually, the oldest being the Bavarian Festival, begun in 1958, and attracts over 100,000 people. Other festivals include Oktoberfest, Zehnder's Snowfest, Summer Music Fest, Dog Bowl, Balloons over Bavarian Inn, and the World Expo of Beer. Aside from the downtown businesses on Main Street, the River Place Shops are a miniature Bavarian village that features over 40 shops along meandering pedestrian streets. Frankenmuth continues to thrive as a travel destination with many demand generators in a concentrated area.



Birch Run

Birch Run is a small village of 1,532 people that has a history as an agricultural and timber community. It was established in 1852 and was incorporated in 1955.

Its claim to fame is the Birch Run Premium Outlets at the exit along Interstate 75. It opened in 1986 and expanded over time to become the largest outlet center in the Midwest. Despite no longer claiming that title, it is still among the largest and very popular with people from the southern metropolitan areas traveling north for recreation or just to shop. The mall was purchased in 2010 by Simon Property Group. The center contains over 150 shops, restaurants, and has attracted over 20 stand-alone restaurants and six hotels. A new outlet center in Ann Arbor could possibly cannibalize some of the business from Birch Run. Birch Run Premium Outlets aims to continue capitalizing on the proximity to the northern Detroit suburbs and travelers that frequent Frankenmuth and those vacationers traveling to the recreational destinations in the northern Lower Peninsula.

Birch Run is a focus area of this analysis. The aim is to determine options for Birch Run to remain competitive and fill seasonality gaps.



Chesaning

Chesaning is the southernmost incorporated village in Saginaw County, with 2,362 people. The village became organized in 1869, a few years after a dam, sawmill and a grinding mill had been built. The railroad arrived in 1867, permanently establishing the town. In 2002, the Saginaw County Fair moved to new fairgrounds in Chesaning and is held the first week of August. Also at the fairgrounds is Santa's Village, an indoor Christmas tree-lighted carnival with rides, a model train layout, a large Lego display, crafts, food, a Kris Kringle mart, and a Department 56 collection of miniature buildings in a winter scene.

Chesaning's primary tourism attractions are the County Fairgrounds and the Showboat Park Amphitheater. The quaint community is perceived to be far away from major thoroughfares and difficult to access, according to local representatives, but that is not necessarily the reality. While the community does offer attractions, the lack of lodging options hinders its ability to attract events.



Convention, Conference, and Meeting Facilities

Saginaw County currently offers 12 venues with more than 3,000 square feet of total function space. Eight of these venues are located in Saginaw, but the largest facility, the Birch Run Expo Center, is located in Birch Run, approximately 20 minutes south of downtown Saginaw. As shown in the supply table, the county currently offers two facilities with exhibit space. Saginaw's primary downtown event venue, the Dow Event Center, does not offer the flat floor space necessary to attract impactful conventions and events to the market. Horizons Conference Center, located five miles northwest of downtown Saginaw, features the largest ballroom in the market, approximately 27,000 square feet, but offers less than 3,000 square feet of supporting breakout space. The only sizeable event venues in the market that also feature attached or walkable hotel rooms are the Bavarian Inn Lodge and Zehnder's in Frankenmuth, approximately 15 miles southeast of downtown Saginaw. While these venues offer a unique space and experience for certain groups, the function space, amenities, and surrounding activity do not meet the expectation for many modern meeting and event planners.

Saginaw County Meeting Market Analysis

Facility	City	Total Function Space (SF)	Exhibit Space (SF)	Ballroom Space (SF)	Meeting Space (SF)	Breakout Rooms	Walkable Hotel Rooms
Birch Run Expo Center	Birch Run	116,800	100,000	16,800	--	--	--
Horizons Conference Center	Saginaw	29,952	--	27,066	2,886	4	--
Harvey E. Kern Community Pavilion	Frankenmuth	28,000	28,000	--	--	--	--
Saginaw Valley State University	Saginaw	19,600	--	8,300	11,300	7	--
The Temple Theatre	Saginaw	12,832	--	5,998	6,834	3	--
Dow Events Center	Saginaw	11,904	--	10,000	1,904	2	--
Bavarian Inn Lodge/Frankenmuth	Frankenmuth	11,219	--	6,160	5,059	5	360
Golden Glow Ballroom*	Saginaw	9,600	--	7,500	2,100	1	--
Zehnders of Frankenmuth	Frankenmuth	9,500	--	4,590	4,910	6	146
Swan Valley Banquet*	Saginaw	8,625	--	8,625	--	--	--
Saginaw Club*	Saginaw	7,965	--	3,000	4,965	9	--
Four Points by Sheraton Saginaw	Saginaw	3,808	--	2,688	1,120	3	140
Average	--	22,484	64,000	9,157	4,564	4	215

* Room sizes estimated off of room capacities

Source: Various Event Facilities, Hunden Strategic Partners



Birch Run Expo Center



Horizons Conference Center

Convention, Conference, and Meeting Facilities

Located 16 miles south of downtown Saginaw off of I-75, the Birch Run Expo Center is a converted hockey complex that features approximately 100,000 square feet of exhibit space divided between two former ice rinks. The privately-owned complex also features a 16,000 square foot ballroom that is capable of hosting weddings and other banquet events. Not originally developed to function as an event venue, the complex is not designed to attract modern conventions and conferences. The lack of an attached or adjacent hotel also limits the types of events that the facility can pursue, and the quality of the venue is not up to par with competitive regional event venues.

Overall, analysis of the Saginaw County convention, meeting, and conference market, and conversations with local market stakeholders, suggests a lack of a high quality, sizeable, flexible event venue with an attached hotel. This presents a significant opportunity for the market.



Arena, Sports & Entertainment Facilities

Featuring seven sizeable venues, Saginaw County features the most comprehensive supply of entertainment venues in the Great Lakes Bay Region. Most notable are the Dow Event Center and the Huntington Event Park, both of which are located in downtown Saginaw, just off Interstate-675 and along the Saginaw River. The Dow Event Center houses three of Saginaw's entertainment venues including the Arena, Theater, and the Red Room, while the Huntington Event Park, which includes a pavilion, a main stage, and a grassy area, is located across the street from the complex. Showboat Park Amphitheater, located in Chesaning, is the largest outdoor venue in the county, featuring a capacity of more than 6,300.

Saginaw County - Entertainment Venues

Facility Name	Venue Type	Capacity
The Arena at Dow Event Center	Ice Hockey - Music - Performance	7,600
Showboat Park Amphitheater	Music	6,360
Huntington Event Park	Amphitheater - Pavilion	5,550
The Theater at Dow Event Center	Theater - Music	2,276
Temple Theater	Theater - Music	1,750
The Red Room at Dow Event Center	Theater - Music	1,056
Dixie Motor Speedway	Racing	N/A
Average		4,099

Source: Hunden Strategic Partners



Huntington Event Park



Showboat Park Amphitheater

Arena, Sports & Entertainment Facilities

Five of the seven entertainment venues located in Saginaw County are located in, or near, downtown. Of the venues located outside of downtown Saginaw, Showboat Park Amphitheater is in Chesaning and Dixie Motor Speedway, a 4/10 mile oval short track complex, is located in Birch Run.

Analysis of the existing entertainment venues in Saginaw County suggests that there is an adequate supply of unique complexes in the market, but there is an opportunity to enhance quality and experience. HSP's analysis indicates that the downtown event venues, the Arena at The Dow Event Center, and the Huntington Event Park, are not currently designed and situated to efficiently accommodate events and create a unique entertainment experience for the visitor. This presents an opportunity for the market.



Dow Event Center *Saginaw, Michigan*

Opened: 1972

Renovated: 2003

Renovation Cost: \$17 million

Owned by: City of Saginaw

Managed by: SMG

Features:

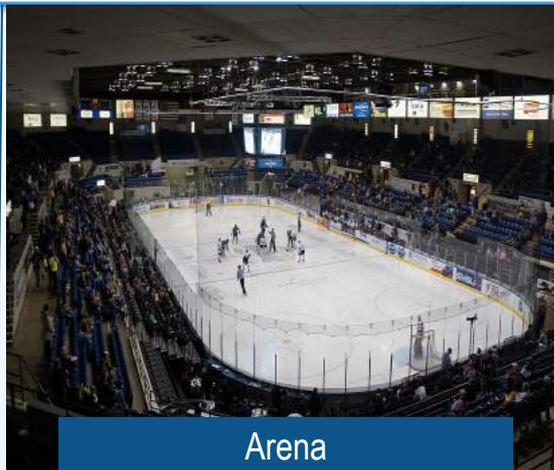
Arena - 7,600 capacity – 25,000 SF

Theater – 2,267 capacity

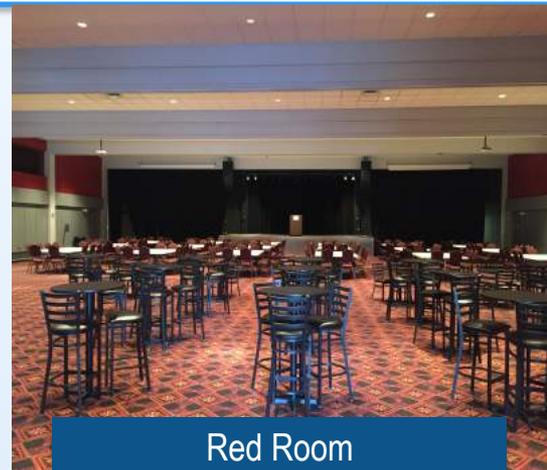
Red Room – 1,056 capacity – 10,000 SF

Garden Room – 184 capacity – 1,739 SF

Overall, the market reported that the venue is capable of hosting quality events; however, the pre and post support amenities are lagging behind expectations. Additionally, the lack of a headquarter hotel complex hinders the facility in attracting events. The Saginaw Spirit, an OHL hockey team, is the anchor tenant at the arena. The team drew an average of 3,354 fans per game in 2016. Overall, the Dow Event Center serves Saginaw, Midland, and Bay Counties and is the premier indoor event destination in the region.



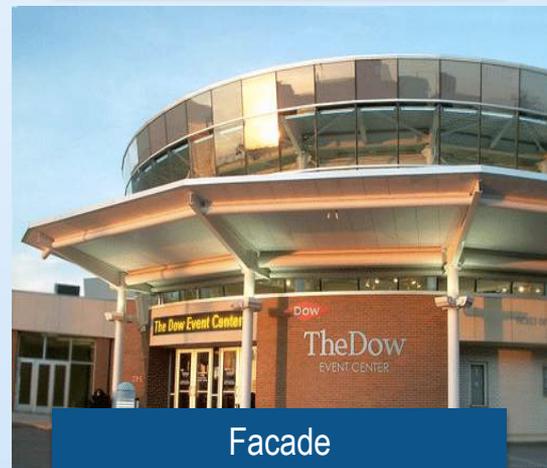
Arena



Red Room



Theater



Facade

Hotel, Resort, Waterpark and Other Lodging

As the table shows, Saginaw County features approximately 3,000 total hotel/lodging rooms across 36 properties. Outside of the 17-room, independent Montague Inn, there are no hotels rooms located within two miles of downtown Saginaw. The primary hotel node in the county, which features four of the five upscale properties in the market, is located four miles north of downtown Saginaw at the intersection of I-675 and Tittabawassee Road. In total, this node offers nearly 1,000 hotel rooms, the majority being of upper midscale or upscale quality. Conversations with local market representatives indicated that Saginaw properties experience a strong corporate demand throughout the week and a growing youth sports demand on the weekend in the summer months, but minimal group demand.

Property	Distance from Saginaw	Rooms	Chain Scale	Open Date
Montague Inn Lodging & Dining	0.3	17	Indep	Jun-86
Ramada Saginaw Hotel & Suites	2.2	95	Midscale	Jun-63
Motel 6 Saginaw Frankenmuth	2.8	71	Economy	Jun-74
Welcome Inn & Suites	2.9	95	Indep	Sep-84
Super 8 Saginaw	4.1	58	Economy	Apr-85
Holiday Inn Express & Suites Saginaw	4.1	98	Upper Midscale	Jun-01
Knights Inn Saginaw North	4.1	60	Economy	Jun-85
Four Points by Sheraton Saginaw	4.1	140	Upscale	Jun-81
Hampton Inn Suites Saginaw	4.2	96	Upper Midscale	Sep-11
Regency Inn	4.2	27	Indep	Jun-56
Country Inn & Suites Saginaw	4.3	104	Upper Midscale	Feb-90
Comfort Suites Saginaw	4.4	65	Upper Midscale	Oct-96
Fairfield Inn & Suites Saginaw	4.4	74	Upper Midscale	Oct-96
Residence Inn Saginaw	4.5	68	Upscale	Dec-05
SpringHill Suites Saginaw	4.6	79	Upscale	Mar-09
TownePlace Suites Saginaw	4.6	73	Upper Midscale	Jun-13
Curry's Motel	4.7	48	Indep	Aug-68
Northgate Inn Saginaw	5.6	28	Indep	Jun-93
Knights Inn Frankenmuth Bridgeport	6.1	106	Economy	Jun-88
Sleep-ees Inn	6.2	23	Indep	Jun-76
Gratitot View Motel	6.5	16	Indep	--
Baymont Inn & Suites Bridgeport Frankenmuth	6.5	100	Midscale	Feb-97
Drury Inn & Suites Frankenmuth	12.2	76	Upper Midscale	Apr-95
Fairfield Inn & Suites Frankenmuth	12.3	62	Upper Midscale	May-99
SpringHill Suites Frankenmuth	12.3	66	Upscale	Jun-02
Marv Herzog Hotel	12.3	38	Indep	Jun-07
Holiday Inn Express & Suites Frankenmuth	12.5	70	Upper Midscale	Jul-14
Bavarian Inn Lodge	12.5	354	Indep	Jun-86
Zehnder's Splash Village	12.8	152	Indep	Jun-72
Frankenmuth Motel	12.8	54	Indep	Jun-50
Country Inn & Suites Birch Run Frankenmuth	14.5	71	Upper Midscale	Jun-97
Best Western Of Birch Run Frankenmuth	14.7	107	Midscale	Jun-78
Comfort Inn Birch Run	14.8	99	Upper Midscale	May-97
Hampton Inn Birch Run Frankenmuth	14.9	95	Upper Midscale	Jun-96
Americas Best Value Inn Birch Run	14.9	110	Economy	May-92
Holiday Inn Express Birch Run Frankenmuth	14.9	95	Upper Midscale	Jun-96
Total/Average	7.9	2,990	--	Jan-90

Source: STR, Hunden Partners

Hotel, Resort, Waterpark and Other Lodging

The largest lodging complex in the Saginaw County market is the 354-room Bavarian Inn Lodge in Frankenmuth, followed by the 152-room Zehnder's Splash Village Hotel and Waterpark of Frankenmuth. Each property features a waterpark and a variety of kids attractions. Conversations with property management indicated that property demand is consistent with breaks in the school calendar. Demand for room nights increases in the summer months and on the weekends, as well as throughout winter break.

The second node of higher quality lodging options in Saginaw County is located in Birch Run, approximately 20 minutes south of downtown Saginaw at the intersection of I-75 and Birch Run Road. The Birch Run node features six properties and nearly 600 rooms, including 360 upper midscale rooms.

Overall, analysis of the Saginaw County lodging market indicates a fairly healthy supply of quality lodging options throughout the market, but there is a lack of options in downtown Saginaw. In order to attract larger, impactful events to the region, a destination must offer a collection of high-quality meeting spaces, walkable hotel rooms, and surrounding activity including restaurants, nightlife, and entertainment. Currently, downtown Saginaw, the center of activity and entertainment in the county, does not offer the lodging options to complement its existing assets, including the Dow Event Center. This presents an opportunity for the county.



Youth & Amateur Sports Facilities

Saginaw County features a number of youth and amateur sports venues. The Saginaw Township Soccer Complex, the largest facility in the Great Lakes Bay Region, features 21 multipurpose fields. This complex attracts major soccer events and serves as a primary tourism demand generator for Saginaw County in warmer months. Center Courts indoor facility, which features four basketball and eight volleyball courts, is the only complex in the market capable of accommodating basketball or volleyball events of any significant size. In total, Saginaw County boasts 19 youth and amateur sport facilities totaling more than 160 playing surfaces. Major youth and amateur sports are accommodated among the 59 diamonds, 36 multipurpose fields and 11 basketball courts.



Saginaw Township Soccer Complex

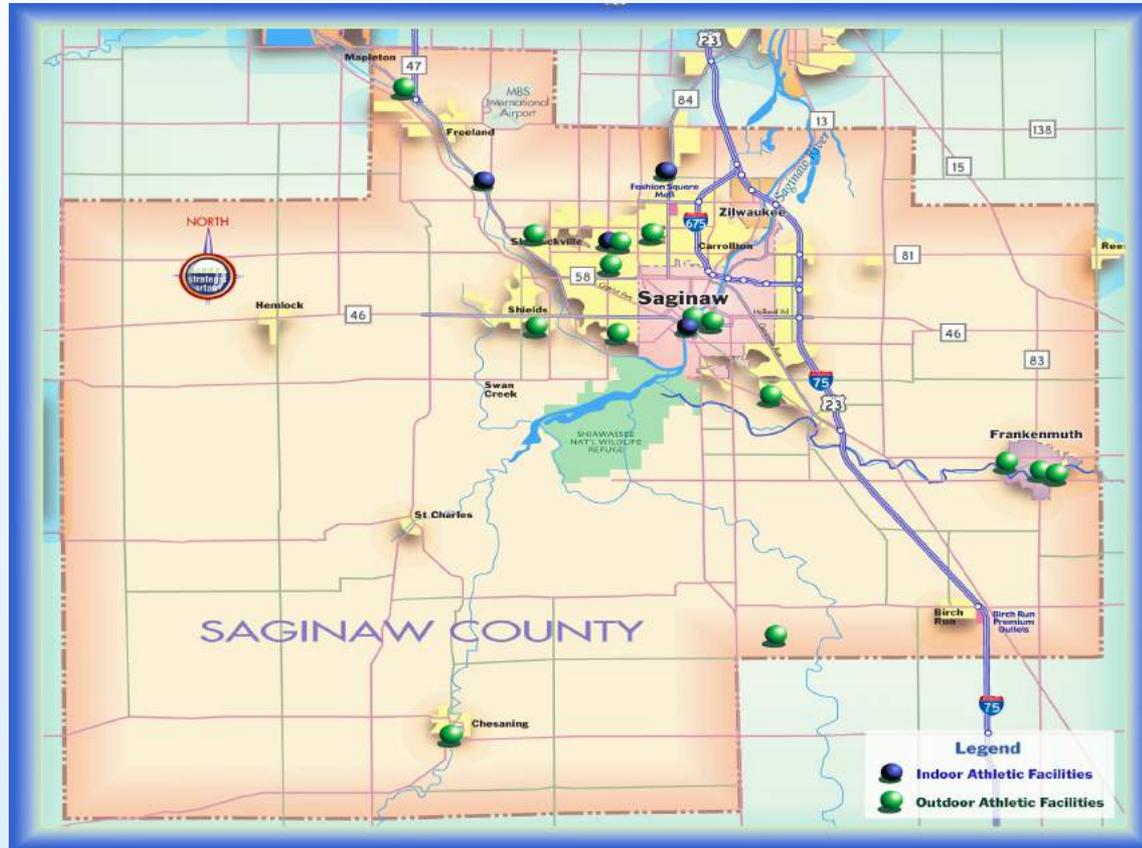
Saginaw County - Youth Sport Facility Supply

Facility Name	Indoor / Outdoor	Diamonds	Multi-Purpose	Ice Sheets	Basketball	Volleyball	Tennis	Pool	Multi-Purpose (Indoor)	Track	Total
Freeland SportsZone	Indoor	2	--	--	2	8	3	--	--	YES	16
Center Courts	Indoor	--	--	--	4	8	4	--	--	YES	17
YMCA of Saginaw	Indoor	--	--	1	--	--	--	1	--	YES	3
Saginaw Bay Ice Arena	Indoor	--	--	1	--	--	--	--	--	--	1
Saginaw Township Soccer Complex	Outdoor	--	21	--	--	--	--	--	--	--	21
George Olson Recreational Complex	Outdoor	4	--	--	1	--	10	--	--	--	15
Showboat Park	Outdoor	5	1	--	2	3	--	--	--	--	11
Taymouth Township Park	Outdoor	5	4	--	1	--	--	--	--	--	10
St. Lorenz Soccer Fields	Outdoor	--	9	--	--	--	--	--	--	--	9
Harvey Randall Wickes (East-West)	Outdoor	7	--	--	--	--	--	--	--	--	7
Heritage Park - Frankenmuth	Outdoor	5	--	--	--	2	--	--	--	--	7
Garber Tennis Courts	Outdoor	--	--	--	--	--	6	--	--	--	6
Hoyt Park	Outdoor	6	--	--	--	--	--	--	--	--	6
Liberty Park	Outdoor	6	--	--	--	--	--	--	--	--	6
Memorial Park - Frankenmuth	Outdoor	--	--	--	--	--	6	--	--	--	6
Tittabawassee Township Park	Outdoor	6	--	--	--	--	--	--	--	--	6
North Little League Park	Outdoor	5	--	--	--	--	--	--	--	--	5
Roberts Park	Outdoor	4	1	--	--	--	--	--	--	--	5
Rudy Zauel Park South Little League	Outdoor	4	--	--	--	--	--	--	--	--	4
Total		19	59	36	1	11	21	29	1	0	161

Source: GoGreat, Hunden Strategic Partners

Youth & Amateur Sports Facilities

Similar to most other tourism demand drivers in Saginaw County, a majority of the youth and amateur sports facilities are located in, or around, downtown Saginaw. Additional cities within the county that also house sports facilities include Chesaning and Frankenmuth. The Saginaw Township Soccer Complex is located west of downtown Saginaw, and the Center Court Sports Complex is located six miles northwest of downtown. Conversations with local stakeholders indicated that Center Court Sports, a Saginaw Township Parks and Recreation facility, is not aggressively marketed towards attracting major athletic events. HSP's analysis indicated that Saginaw County features an adequate supply of outdoor youth and amateur sport facilities, but there is an opportunity for the market to expand its indoor offerings.



Other Attractions

Analysis of the top Saginaw County attractions indicates a collection of unique visitor experiences combined with traditional destinations and activities. The offerings of Frankenmuth, including Bronner's CHRISTmas Wonderland, Weiss Centennial Farms Frankenmuth Corn Maze, Frankenmuth FunShips, The Frankenmuth Aerial Park, and the Bavarian Belle Riverboat, provide Saginaw County with attractions that separate market from competitive regions throughout the state. The Bavarian Belle Riverboat, which provides a one-hour historical tour of Frankenmuth on a restored 150-passenger vessel, is a popular attraction for visitors to the area. Bronner's CHRISTmas Wonderland features a 7.35-acre building and is considered the World's Largest Christmas Store in the United States.



Bronner's CHRISTmas Wonderland

Saginaw County- Other Attractions

Name	Description
Alpine Mountain - Birch Run	Go-kart tracks, miniature golf, bumper boats, and small arcade.
Bavarian Belle Riverboat - Frankenmuth	Cruise along the Cass River from May to mid-October
Bavarian Inn Castle Shops	Seven shops - toys, souvenirs, and candy
Bronner's CHRISTmas Wonderland	More than 50,000 Christmas gifts
Chesaning Area Historical Museum	Museum with historical artifacts
Children's Zoo at Celebration Square	10 acres of landscaped paths, featuring gardens and animal exhibits.
Frankenmuth Aerial Park	Climbing and zipline - six forest trails of ziplines and bridges
Frankenmuth Farmers Market	Farmer's market
Frankenmuth FunShips	Electric 12-person boat
Grand Traverse Distillery	Micro-distillery
Japanese Cultural Center & Tea House	Only authentic tea house in the Midwest.
Kokomo's Family Fun Center	Go-carts, play miniature golf, lazer tag, arcade games and more
Mid-Michigan Children's Museum - Saginaw	GLB region children's museum
Moonwalks House of Bounce - Frankenmuth	Inflatable play center
Pintown Pizza & Lanes - Chesaning	10 bowling lanes
Saginaw Art Musuem	Features Italianate garden and art collection of over 2,000 objects
Sky Zone Trampoline Park	Trampolines and a pit filled with 10,000 foam cubes
Spring Break Family Fun Center - Birch Run	9,000 square foot climate controlled play zone
Stardust Lanes	Michigan's only boutique bowling
Weiss Centennial Farms Frankenmuth Corn Maze	Corn maze
Wilderness Trails Zoo - Birch Run	Mile-long walking trail, 50 species of animals on 56 acres.

Source: HSP, GoGreat

Other Attractions

The Mid-Michigan Children's Museum, located across the river from downtown Saginaw, features over 16,000 square feet of gallery space in addition to classrooms, gift shops, and programming rooms. The museum is the only museum in the Great Lakes Bay Region designed solely for children under the age of ten.

Analysis of the existing supply of attractions and conversations with local stakeholders suggests that the county offers a strong collection of destinations geared towards young children, such as the Children's Museum and the zoo, but the market lacks activities for teenagers and young professionals.



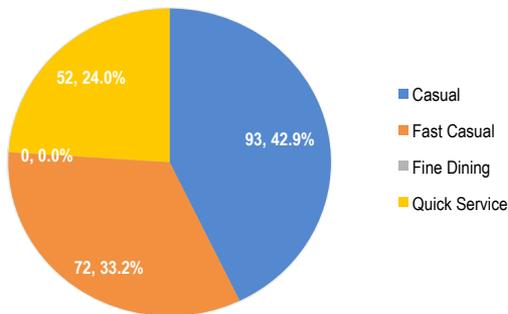
Mid-Michigan Children's Museum



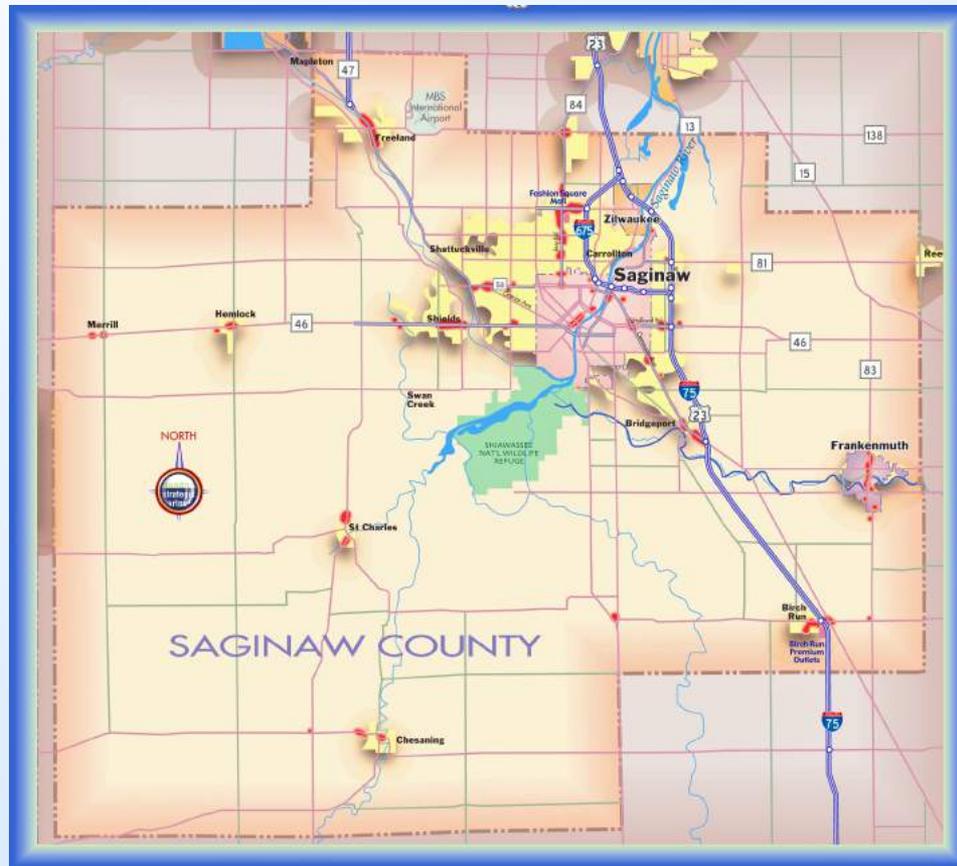
Restaurant Supply

Analysis of the Saginaw restaurant supply, summarized in the chart below and shown in the heat map to the right, indicates that the county, and downtown Saginaw in particular, does not offer the collection of bar and nightlife options that millennials and young professionals are seeking. Conversations with local stakeholders suggested that the lack of entertainment and dining options in Saginaw, along with available housing, prevents young professionals from living and playing in the city.

Saginaw County Restaurant Inventory Breakdown

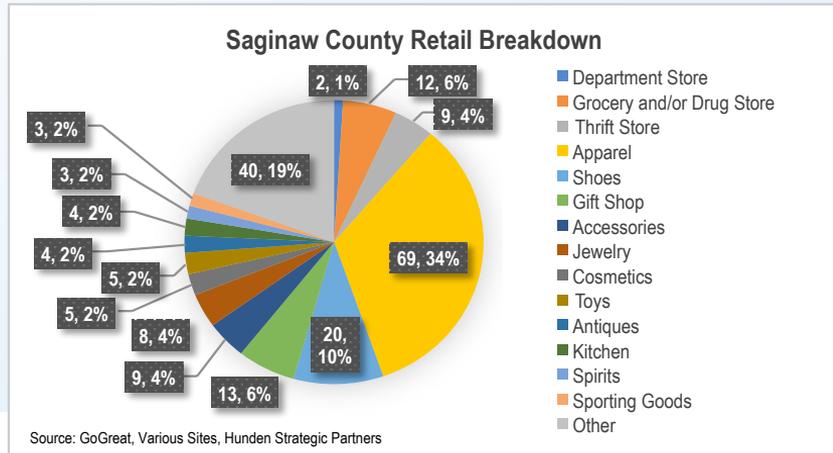


Source: GoGreat, Various Sites, Hunden Strategic Partners



Retail Supply

Analysis of the existing retail supply in the county, summarized in the chart below and shown in the map on the right, shows a strong collection of diverse retail options in the market. The retail hub for the county, and the Great Lakes Bay Region, is Birch Run Premium Outlets. The 11th largest outlet center in the country, Birch Run Premium Outlets is a unique asset to the region that should continue to be leveraged. As e-commerce continues to impact the brick and mortar retail industry, the future of such developments remains uncertain. Already, modifications to the complex have resulted in a disconnected property that can present challenges to the consumer. As changes occur in the industry and at Birch Run Premium Outlets, the area surrounding the mall must adapt to maintain its destination appeal.



Recreation, Parks, and Nature Oriented Assets

Analysis of the parks, nature, and recreation assets currently offered by Saginaw County indicates a strong collection of unique outdoor recreation options. Conversations with local representatives indicated that there is a growing trend of outdoor activity in the market, including visitation to Apple Mountain in the winter months and activities such as bird-watching, hiking, and biking in the spring and summer. Unique outdoor attractions in Frankenmuth, such as the Weiss Centennial Farms Frankenmuth Corn Maze and Frankenmuth Aerial Park, are popular attractions for children throughout the region. The strong collection of outdoor options has allowed Saginaw to establish itself as a growing destination for outdoor activity. While no specific recommendations are provided for additional parks and nature development, the continued activation of the natural assets will only enhance the appeal of the community.

Saginaw County Parks, Nature, and Recreation Assets

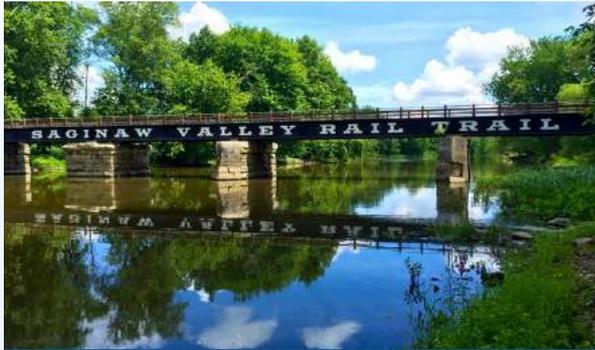
Name	Description
Apple Mountain Resort	Ski slopes, 18-hole golf course, conference center
City of Saginaw Riverwalk	Traversed both banks of the Saginaw River
Frank N. Andersesn Celebration Park	4 acres - 15,000-square foot skate park, pavilion, bocce ball courts
Frankenmuth FunShips	Rivertours through Frankenmuth
Hartley Outdoor Nature Center	80 acres - environmental and outdoor education
Imerman Memorial Park	Access to Tittabawasee river - fishing, boat launch. Hiking, dog park
Kochville Township Multi-Use Path	5-mile trail
Memorial Park - Frankenmuth	40 acres - stage for concerts, rose garden, boat launch, dog park, disc golf
Price Nature Center	186 acres - three miles of hiking trails and campground
Ringwood Forest	160 acres - three miles of trails
Saginaw Township George Olson Pathway	Part of George Olson Recreation Complex
Saginaw Valley Rail Trail	10-mile trail from St. Charles to Center Road Bridge Path
Shiawassee National Wildlife Refuge	9,800 acres - five miles south of Saginaw
Weiss Centennial Farms Frankenmuth Corn Maze	Open from September 23 - October 30
William H. Haithco Recreation Area	40-acre man-made lake
Zilwaukee Pathway	2-mile long asphalt trail

Source: Hunden Partners, GoGreat

Recreation, Parks, and Nature Oriented Assets

Located south of downtown Saginaw, the Shiawassee National Wildlife Refuge is a 9,870-acre national wildlife refuge managed by the United States Fish and Wildlife Service. The refuge was originally established in 1953 to provide habitat for migratory waterfowl.

The Saginaw Valley Rail Trail is an 11-mile trail of converted railroad corridor from St. Charles to Saginaw, crossing over wildlife wetlands and featuring three pocket parks featuring gazebos, benches, and shelters.



Saginaw Valley Rail Trail



Festivals and Other Major Events

Consistent with many other analyses conducted in this chapter, the events and festival offerings of Saginaw County are greatly enhanced by Frankenmuth. Events such as the World Expo of Beer and the Frankenmuth Bavarian Festival are extremely unique to the Great Lakes Bay Region. While the market does provide a collection of unique events, conversations with local stakeholders indicated that the existing festivals are too focused on accommodating locals and not attracting visitors from outside the region.



Frankenmuth Bavarian Festival

Saginaw County Festivals and Other Events

Name	Description
Zehnder's Snowfest - Frankenmuth	January - Ice sculptures and live entertainment
Ice Blast Festival - Saginaw	February - Festivities throughout town
Freeland Walleye Festival	April - fishing tournament
Frankenmuth Dog Bowl	May - olympic-style events for dogs
World Expo of Beer - Frankenmuth	May - Michigan's largest beer sampling event
Frankenmuth Bavarian Festival	June - German food, beer, and dancing
KCQ Country Music Fest - Saginaw	June - free country concert
Saginaw Greekfest	June - attracts 80,000 for dancing and Greek food
Blues, Brews, and BBQ - Birch Run	July - chicken, ribs, and barbecue
Frankenmuth Auto Fest	September - 3 days and over 2,000 cars
Oktoberfest - Frankenmuth	September - only sanctioned Oktoberfest outside of Germany
Michigan's Big Country Fest - Frankenmuth	October - live country music and dancing
Chesaning Christmas Candlewalk	November - Christmas Celebration
Holidays in the Heart of the City - Saginaw	November - Christmas Celebration

Source: HSP, GoGreat

Conclusions and Recommendations - Saginaw

Based on an analysis of existing quality and supply of tourism generators throughout the local market, as well as conversations with community leaders and stakeholders throughout the county, HSP determined the following about the strengths, weaknesses, opportunity and threats of Saginaw County as it relates to the current tourism appeal of the county:

STRENGTHS:

Entertainment Venues: The Dow Event Center remains the largest and highest quality indoor entertainment and event complex in the region, and the Huntington Event Park provides Saginaw with a high-quality outdoor venue to attract concerts and other entertainment.

Outdoor Sports Complexes: The Saginaw Township Soccer Complex, the largest outdoor complex in the region, continues to attract major events to the area. In addition to the 21-field soccer complex, Saginaw County offers a variety of outdoor baseball complexes that solidify Saginaw as a destination for outdoor sports.

Children's Activities: Saginaw County offers a unique collection of attractions for children, including the Children's Zoo at Celebration Square and the Mid-Michigan Children's Museum.

Outdoor Recreation: Saginaw has cultivated an environment that leverages the abundance of outdoor parks, natural, and recreational assets throughout the city and the county. While a strength of the market, additional activities in these areas will help to establish an identity that can lead to additional visitation.

Frankenmuth: The Bavarian Inn Lodge, Zehnder's, and Bronner's CHRISTmas Wonderland, along with the other unique shops, attractions, and activities in Frankenmuth, provide the county with a unique destination that should continue to be leveraged.

WEAKNESSES:

Critical Mass: Downtown Saginaw does not offer the bars, restaurants and nightlife to generate a critical mass of activity. Not only does this impact the pre and post spending for events occurring at the the Dow Event Center, but it hinders and inhibits young professionals from frequenting the city.

Expo Center: While the Birch Run Expo Center features the largest exhibit space in the market, the venue is not a true convention and event complex and does not offer the lodging and amenities necessary to attract significant events. Overall, the market lacks a true convention complex.

Conclusions and Recommendations - Saginaw

WEAKNESS (cont'd)

Indoor Youth Sports: While Saginaw has historically been a destination for major soccer tournaments due to the supply of high-quality outdoor sports complexes, the county, nor the region, offers an indoor facility capable of hosting major baseball and volleyball events that will generate room nights and economic impact in the community.

Festivals: While Frankenmuth is a destination for many of the most unique festivals in the region, many events that occur throughout Saginaw are focused on attracting local residents and not visitors. This presents an opportunity for Saginaw moving forward.

OPPORTUNITIES:

Downtown Development: Downtown Saginaw is not currently considered a destination for living, working, and playing. As development occurs, activity will increase and the downtown area has an opportunity to be a residential destination for young professionals.

Conventions/Events: Due to the lack of available, flexible event spaces in Saginaw, the market is unable to pursue major conventions and conferences that generate room nights and spending. Conventions, conferences, and other events present a significant opportunity for Saginaw.

THREATS:

Age of Citizens: The age of the Saginaw population, as well as the population of the Great Lakes Bay Region, continues to increase. While not a major threat, the changing demographics of the region is something to be considered when moving forward.

Safety Perception: While crime has substantially decreased in Saginaw, the perception exists that the area, and specifically downtown, is unsafe. This perception is untrue. This must be aggressively addressed and this untrue perception must be corrected.

Conclusions and Recommendations - Saginaw

Based on the analysis provided in this chapter, HSP recommends that the following projects be considered for additional analysis to enhance destination appeal and tourism visitation to Saginaw County. HSP also provides *aspirational* examples of similar to relevant development that have occurred throughout the country in the following slides.

DOWNTOWN SAGINAW

Dow Event Center Renovation/Expansion: As the primary indoor event venue in the region, the Dow Event Center functions primarily as a sports and entertainment venue and does not offer the collection of spaces necessary to host impactful conventions and other events. The development of new function space, including exhibit space, ballrooms, and meeting rooms, will allow Saginaw to act as a true convention destination and attract conferences and other events that the county is currently unable to pursue. (See: Fort Wayne Grand Wayne Center and Peoria Civic Center)

HQ Hotel Development: In order for Saginaw to compete with regional event venues, the facility must offer an adequate number of high-quality walkable hotel rooms. HSP recommends the development of a full-service hotel connected or adjacent to the Dow Event Center. (See: DoubleTree by Hilton Evansville)

Downtown District: HSP recommends the consideration of a downtown district environment that can connect the assets of downtown Saginaw, including the Dow Event Center and the Huntington Event Park, with additional streetscaping, lighting, landscaping, and benches. As Saginaw becomes a destination for larger and more impactful events, the viability of additional restaurants, shops, and bars in the downtown area improves. (See: MB Financial Park)

In addition to the recommendations above, HSP also recommends the creation/development of unique downtown Saginaw events in the winter months to balance the annual event calendar and generate visitation to the city. HSP also recommends the consideration of a culinary school development in downtown Saginaw and the relocation of the Great Lakes Bay Regional CVB to a street-level presence near the Dow Event Center.

Grand Wayne Convention Center – Fort Wayne, IN

Opened: 1985

Renovated: 2003 – 2005

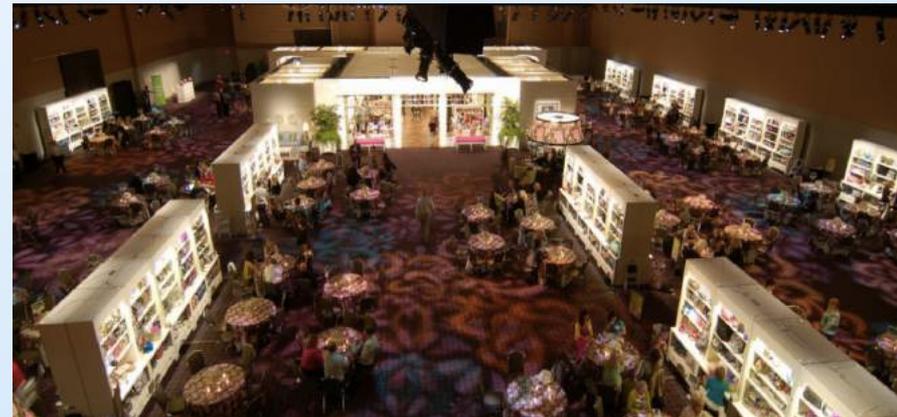
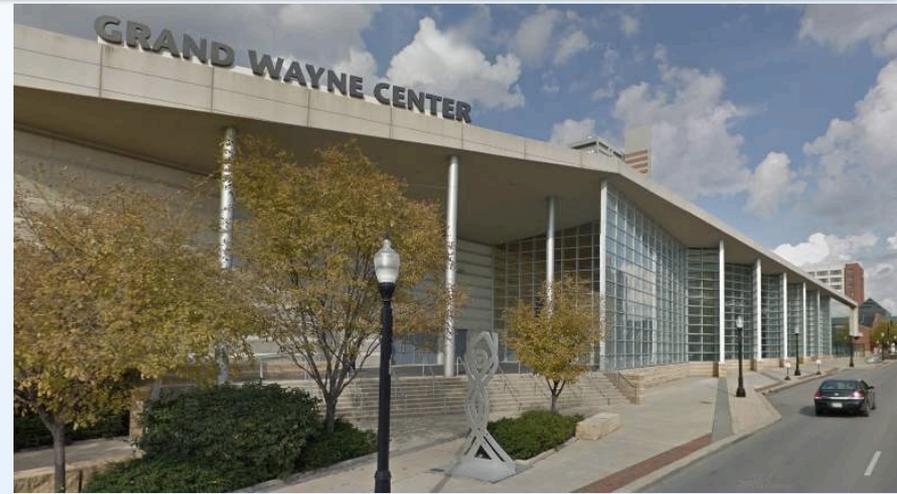
Renovation Cost: \$42 million (2005)

Owned & Operated by: City of Fort Wayne

City of Fort Wayne Population (2015): 260,326

Allen County Population (2015): 368,450

The Grand Wayne Convention Center, which opened in 1985, underwent a \$30 million renovation in 2003. Renovations at the facility helped to spur additional downtown development, which included a minor league baseball stadium, 900-space parking garage and 250-room Courtyard by Marriott hotel. Funding for the convention center's renovation came from .75 percent of a seven percent hotel occupancy tax imposed on out-of-town visitors staying at local hotel properties. Additionally, funding generated from a tax incremental financing (TIF) district helped to finance the infrastructure improvements required after convention center renovations. Annually, the renovated convention center hosts more than 300 events including conventions, conferences, trade shows, meetings and special events. In total, the convention center boasts 225,000 square feet of function space including one 50,000 square foot exhibition hall, 18 meeting rooms and two walkable full-service hotels. Recently, city officials announced plans to build a \$105 million sports arena and events center in downtown. The venue would have a maximum capacity of 5,646.



Peoria Civic Center – Peoria, IL

Opened: 1982

Arena Capacity: 11,330

Construction Cost: \$64 million

Owned by: City of Peoria

Managed by: SMG

City of Peoria Population (2015): 115,070

Peoria County Population (2015): 186,221

The Peoria Civic Center opened in 1982 after more than ten years of planning, which included the passing of tax laws in 1976 to allow for funding as well as the implosion of the Jefferson Hotel in 1978. When the complex originally opened, the center was home to exhibit halls A&B, meeting rooms, the arena, and theater. In 1992, the center went through its first expansion which totaled \$10 million and 104,000 square feet of additions. The facility reopened in 1993 with an additional exhibit hall and meeting rooms. Again, in 2007, the Civic Center underwent a second, \$55 million renovation. The second renovation added a fourth exhibit hall (Hall D), a 27,000 square foot ballroom, the Lexus Club, Great Hall, and indoor box office. In total, the facility now offers 45,000 square feet of meeting room space, 110,000 square feet of exhibit space, a 11,330-capacity arena and one 2,196 capacity theater. The Bradley Braves of the NCAA and the Peoria Rivermen of the SPHL are current tenants at the arena.



DoubleTree by Hilton - Evansville, IN

Opened: 2017

Construction Cost: \$61 million

Room Count: 241

Owned by: HCW Evansville Hotel, LLC

Managed by: Aimbridge Hospitality

City of Evansville Population (2015): 119,943

Vanderburgh County Population (2015): 181,877

The 241-room DoubleTree Hotel by Hilton, located in downtown Evansville, was developed adjacent to the Ford Center (arena), Old National Events Plaza and Central Library. The hotel was developed out of downtown Evansville's need for a headquarter hotel capable of serving the 11,000-seat capacity Ford Center and the 55,600-square foot Old National Events Plaza, both of which are connected to the headquarter hotel via enclosed walkways. Downtown Evansville had been starved of a headquarter hotel since the rundown Executive Inn hotel was demolished to allow for the Ford Center. Funding for the DoubleTree Hotel came from a variety of sources including \$34 million from HCW, \$10 million from Old National Bank and the balance, including land, from the City of Evansville. In total, construction costs for the project were \$61 million.



MB Financial Park – Rosemont, IL

Opened: 2012

Total GLA: 200,000 SF

Tenants: 12

Village of Rosemont Population (2015): 4,206

Cook County Population (2015): 5,238,216

MB Financial Park is located approximately 15 miles northwest of downtown Chicago in the Village of Rosemont. MB Financial Park is a 200,000 square-foot entertainment and dining complex that features 12 venues, all of which offer upscale international cuisine, live music, comedy, state-of-the-art theater or bowling, respectively. The complex also features a seasonal NHL regulation ice rink that is climate controlled and put up in the winter. This suburban entertainment district is a one-stop suburban destination for dining, entertainment, nightlife and activities for the family. The entertainment district is in walking distance of the Donald E. Stephen Convention Center and located just east of O'Hare International Airport. It offers the types of food, beverage and entertainment options that conventioners and those staying at nearby hotels want when seeking a convenient set of options. Notable tenants include Bogarts, Hofbräuhaus House Chicago, King Bowl, Frozemont, iFly, Muvico and the Sugar Factory.



Conclusions – Birch Run

Based on a detailed analysis of existing quality and supply of tourism generators throughout the local market, as well as conversations with community leaders and stakeholders throughout the county, HSP determined the following about the strengths, weaknesses, opportunity and threats of Birch Run as it relates to the current tourism appeal of the county:

STRENGTHS:

Birch Run Premium Outlets: While the industry continues to change, and the long-term future of the complex remains uncertain, the presence of one of the largest outlet centers in the Midwest enhances the destination appeal of the area and will continue to provide a foundation of tourism and visitation from which to grow.

WEAKNESSES:

Diverse Demand Generators: The outlet mall is considered a major destination for a certain portion of the population, but Birch Run lacks demand generators that can induce consistent visitation from the population at large, including kids, young adults, and professionals.

Personality: The community, overall, offers a fairly bland selection of chain restaurants, and the area surrounding the mall lacks a true sense of personality and attributes that make the community unique.

OPPORTUNITIES:

Complementary Demand Drivers: The area surrounding the mall presents an opportunity for development that will complement the existing retail options and transform the area into a destination that is not as heavily reliant upon daily shoppers. An additional attraction should generate activity in the winter months to ensure consistent, year-long visitation to the shops.

THREATS:

Shopping Habits: Consumer habits continue to change as a result of e-commerce, and this is having major impacts on the traditional shopping experience. Birch Run Premium Outlets will have to continue to adapt to a changing industry to stay afloat.

Conclusions and Recommendations – Birch Run and Chesaning

Based on the analysis provided in this Chapter, HSP recommends that the following projects be considered for additional analysis to enhance the destination appeal and tourism visitation to Birch Run. HSP also provides *aspirational* examples of similar to relevant development that have occurred throughout the country in the following slides.

BIRCH RUN

Indoor Youth Sports Complex: HSP recommends the consideration of an indoor youth sports complex near the Birch Run Premium Outlets. This type of complex will not only leverage the existing shopping and dining assets in the area, but it will complement the existing sports complexes throughout Saginaw and the Great Lakes Bay Region. (See: Grand Park Fieldhouse and UW Health Sports Factory)

Restaurant Connection District: HSP recommends further analysis into a district development that would combine the existing areas of the mall and provide shoppers, and youth sports visitors, an opportunity to dine and entertain. This concept would connect the existing assets of the development with the recommended future enhancements and extend the calendar of visitation and tourism in the local community. (See: 4th Street and Newport on the Levee)

CHESANING

HSP's analysis of Chesaning, as well as conversations with local stakeholders, suggests an opportunity to establish the community as a destination for the farm-to-table and rural experiences. Packaged authentic, rural experiences can be marketed to induce visitation and spending in the local community. HSP also recommends the consideration of a "glamping" destination in the Chesaning market.

Grand Park Fieldhouse - Westfield, IN

Opened: 2016

Construction Cost: \$8.1 million

Owned by: Local investment group

Formerly Managed by: Jonathan Byrd

City of Westfield Population (2015): 36,738

Hamilton County Population (2015): 309,697

Features:

16 Volleyball Courts

8 Basketball Courts

The 88,000 square foot Grand Park Fieldhouse, formerly the Jonathan Byrd Fieldhouse, is one component to the more than 400 acre Grand Park in Westfield, Indiana. The fieldhouse primarily caters to local and regional basketball and volleyball organizations. Four youth basketball teams including Great Park Select, Primetime, Great Park Premier and Hoosier Co-Op use the Grand Park Fieldhouse as their home court. The facility recently launched its own volleyball club, the Academy Volleyball Club, in 2017. The volleyball club offers three programs: the Little Spikers (4 years old – 9 years old), the Cadets (4th – 10th grade) and the Spring Youth League (2nd – 8th grade). The complex is a destination for major regional and national AAU basketball events throughout the spring and summer months, attracting Division One college coaches from around the country.



UW Health Sports Factory – Rockford, IL

Opened: 2016

Construction Cost: \$24.4 million

Owned by: City of Rockford

Managed by: Rockford Parks & Recreation Department

Features:

16 Volleyball Courts

8 Basketball Courts

City of Rockford Population (2015): 148,278

Winnebago County Population (2015): 287,078

In 2002, the City of Rockford purchased a former Ingersoll Manufacturing building for \$2 million with the intent to repurpose the venue as a youth sports complex. This purchase was one of the first in the greater movement of re-establishing downtown Rockford as a destination for economic activity. In 2016, this dream became a reality with the opening of the 108,000 square foot UW Health Sports Factory. In addition to the 16 volleyball and eight basketball courts, the venue also features five meeting rooms and trade show space as well as a restaurant/bar and riverfront boardwalk. Rockford Hoops, a local youth basketball group, calls the UW Health Sports Factory home and uses the facility for practices, games and to host tournaments. All basketball and volleyball netting drops down from the roof, a trend commonly seen throughout new builds in the industry.



4th Street – Cleveland, OH

Located in downtown Cleveland, 4th Street is an area known for its dining, entertainment and high pedestrian foot traffic. Cleveland's 4th Street was formerly filled with high vacancy and dilapidated structures; however, the development of Pickwick and Frolic Restaurant & Comedy Club in 2002 helped to spur additional development and bring people back downtown. The following concepts are part of 4th Street in Cleveland:

- Greenhouse Tavern
- Lola
- Noodle Cat
- Red, The Steakhouse
- Society Lounge

The one-block long street connects Cleveland's Quicken Loans Arena, Progressive Field, and the heart of the city's downtown, Euclid Avenue. The pedestrian mall is known as a destination for both locals and tourists to visit when seeking entertainment and a night out. In addition to the nightclubs, bars and restaurants, 4th Street also features six residential apartment buildings as well as commercial and hotel properties.



Newport on the Levee – Newport, KY

Opened: 1990

City of Newport Population (2015): 15,354

Campbell County Population (2015): 92,066

Located directly across the river from The Banks entertainment district in downtown Cincinnati, Newport on the Levee was envisioned, approved and commissioned in the late '90s as a multi-level retail entertainment center. It is located between Third Street and the Ohio River and strategically at the foot of the Purple People Bridge that links downtown Cincinnati to Northern Kentucky. Due to the access of the Purple People Bridge, fans from Cincinnati Reds games, concerts, US Bank Arena events and others patronize Newport on the Levee's restaurants and retail stores before and after games and events. The project has served as a successful catalyst for Newport's new image and growth into a trendy and desirable mixed-use downtown district both in terms of overall prosperity and in the minds of the Cincinnati area's two-million-plus residents. Notable tenants include: Bar Louie, Cold Stone, Dewey's Pizza, Five Guys, AMC Newport 20, Newport Aquarium and Thrill Zone LLC. The development also includes a 144-room Aloft Hotel as well as more than 200 contemporary apartment units at Aqua on the Levee.



Birch Run - Recommendation

The figure to the right shows an aerial concept of how the proposed development could be situated on the land adjacent to the outlet mall. The restaurant and dining connection district (red) would be developed on the site of the current southern portion of the existing mall, which features two buildings that are nearly vacant. The sports complex (orange) would be located south of the existing mall property.



Additional Concepts – Saginaw County

Saginaw – Professional Drone Racing

Professional drone racing has taken flight recently with the advent of remote control quadcopters, onboard video cameras and virtual reality goggles. Drone racing involves individuals racing a quadcopter, using First Person View (FPV) virtual reality goggles, through obstacles and around a designated course. Professional drone racers primarily compete in the Drone Racing League (DRL), which is the top bracket having recently agreed to a \$1 million deal with SKY Sports. In 2016, the DRL utilized venues ranging from abandoned warehouses to Hard Rock Stadium, home to the Miami Dolphins. Racing drones can top speeds of 80mph, attracting interest from the millennial generation, as well as traditional racing fans who love NASCAR, motorcycle racing and other speed sports. Also in 2016, the DRL scored more than 28 million viewers on ESPN and attracted sponsors including Bud Light, Allianz and Toy State. Although the DRL is currently the top racing bracket, other drone racing leagues exist, often utilizing more open spaces resulting in fewer crashes. This concept could be considered for utilization of the old MBS airport terminal.



Saginaw - Competitive Online Gaming (eSports)

One of the fastest growing forms of entertainment across the globe is eSports, or competitive online gaming. Overall, competitive online gaming attracted more than \$280 million in sponsorship dollars in 2016, and saw a 19 percent year-over-year increase in the number of hours viewed. Major competitions have sold out Olympic-sized arenas and stadiums in Asia and North America. Live streaming services, like Amazon and YouTube, have also helped to increase the popularity of competitive online gaming by offering live game streams to millions of viewers across the globe. Tournaments, such as those hosted by the Major League Gaming League, World Cyber Games or the Electronic Sports World Cup, fill up largescale venues such as arenas, convention centers and stadiums, as thousands of fans view the competition live. Individual players and teams are often awarded prize money and sponsorships for winning such competitions. This concept could be considered for the Dow Event Center in Saginaw.



Saginaw - Culinary Institute

Although there are several culinary schools across the nation, only a few are popular with the public in which to dine. While there are some institutes that offer one-off or weekly classes for cooking, searing, or grilling popular new meals, only a few offer weekend-long training sessions for tourists.

The Viking Range corporation of Greenwood, Mississippi offers a boutique hotel room stay at the Alluvian Hotel, combined with a two-day culinary education experience (top right). For such weekend outings, a large kitchen-oriented gift shop and organic foods grocery can be part of the experience to make the getaway weekend a one-stop destination.

The Niagara Falls Culinary Institute opened in 2012 and is located in downtown Niagara Falls, New York. The facility is tourism-oriented and features four restaurants and boutiques: Savor, an intimate setting for fine dining near an open hearth, La Patisserie, offering fresh baked goods and coffee drinks, Old Falls Street Deli, featuring deli sandwiches, and The Wine Boutique featuring regional wines. They also offer classes in making beverages.



Saginaw - Makerspaces

Saginaw has a number of vacant and abandoned factory and warehouse buildings, resulting from a declined manufacturing and automobile industry. Re-use of these spaces as the home to artisans both preserves historic structures upon which the city was created, and also provides inexpensive areas in which artists and small businesses and inventors of every type can create and work.

A makerspace is a collaborative work space inside any building for the purpose of learning, arts, exploring, and creating. It can be high-tech or simple, such as construction paper art. These spaces are open to kids, adults, and entrepreneurs, and have a variety of maker equipment including 3D printers, laser cutters, CNC (Computer Numeric Control) machines, soldering irons and sewing machines. These spaces are also helping to prepare those who need the critical 21st century skills in the fields of science, technology, engineering and math. Some of the skills that are learned in a makerspace pertain to electronics, 3D printing, 3D modeling, coding, robotics and woodworking. Makerspaces are also fostering entrepreneurship and are being utilized as incubators and accelerators for business startups.



Saginaw - Tiger Stadium Full-Scale Replica

Themed vacations have been rising in popularity for the past two decades. Musical heritage tours of Jazz and the Blues from Memphis, through the Mississippi Delta, home of The Blues, to New Orleans is a newly popular venue among tourists from not only North America, but especially Europe and Asia. The Kentucky Bourbon Trail is growing exponentially as the promise of experiential road trips beckon travelers and connoisseurs to live the flavors, see the lands that created them, and understand the process that harkens back two hundred years. Baseball travel is a similarly popular themed vacation.

The idea is to replicate Tiger Stadium, as accurately as possible, using pieces (such as seating, turnstiles, ticket gates, and lighting) from old or abandoned minor-league stadiums, as it stood in the 1950s, or maybe during Ty Cobb's era. This could possibly not only bring thousands of baseball fans to their historic Field of Dreams, but could be a working venue for all sorts of activities, obviously including baseball games. Minor leagues, youth leagues, college level games, and even occasional major league games could bring baseball fans from around the nation to the Great Lakes Bay Region. No other team or city has done this.

If the stadium were rebuilt in an urban area (that replaced blighted blocks) in downtown Saginaw, gift shops and restaurants around the stadium would be a natural fit. And, naturally, historic-rules baseball games, played by those in old-timers uniforms, circa 1912 (the year the stadium opened) would be a big hit with fans.

Yes, it would be expensive and may have to be built one section at a time, just as they were back in the early 1900s. A Kick-Start Fund may be a good place to begin. However, possibly no other concept in this report has the power and capacity to draw the heartstrings of so many Tiger fans and fans of the historic baseball game itself, as it was part of the daily American cultural fabric.

To the fans of the Tigers, and of the tradition of America's Pastime and its ballparks, most of the beautiful new parks are beautiful, but they are missing the actual link to historic teams, games, and fans because they are new. For a sport that is so deeply enveloped in its connection to history, it only makes sense that fans lament the fact that so many of the historic baseball grounds are gone. The public sees them in films and documentaries and many adults over 50 remember when a few of the old stadiums were still around. As more and more fans tour the country, trying to see games in as many ballparks as they can, including the most ancient minor-league parks, there is a desire amongst fans to relive the old days.



Birch Run - Cable Park

Whereas traditional water-skiers and wakeboarders are pulled behind a motorboat, cable parks pull water-skiers and wakeboarders behind a suspended electrically-driven cable on a set course. This type of water-skiing/wakeboarding is more affordable and cost effective for users as the added motorboat cost is not included. Additionally, cable parks are more environmentally friendly, using only a portion of the energy required by a motorboat. Typically, cables at these parks are suspended more than 25 feet above the water, allowing thrill seeking users to gain more air when jumping as well as the ability to make sharper turns. Companies like The Wakeboard Cable, sell their cable designs for a base price of about \$9,500. Cable park facilities are popping up throughout the United States with examples in LakePoint, GA, Waco, TX and Rock Hill, SC. Such facilities can range in size from five to 25 acres in total. This outdoor recreation concept could be considered for a site adjacent to the Birch Run Premium Outlets.



Birch Run - Children's Playscape

A city block-sized playscape and splash pad, free to use for families as an amenity to the Birch Run Premium Outlets center could be considered. The inspiration for this is Smothers Park in Owensboro, Kentucky, which was named the top playground in the world in 2015. It features three water falls, swinging metal benches, a concession stand, and restrooms. The Lazy Dayz playground is wheelchair accessible and features a soft ground, a stage for occasional music groups, fiberglass trees with multi-leveled bridges, slides, climbing areas, and tunnels. The splash pad is adjacent to the Lazy Dayz playground. For the common areas, multi-colored brick, low stone walls, and planters with benches, lights and heat lamps add a first-class visual effect.

A similarly colorful and imaginative playscape, with a splash pad for children in an indoor/outdoor facility would be a welcome addition and destination for families traveling "up north", as well as drawing more shoppers to Birch Run.



Birch Run - Winter & Summer Playland

This could accompany the playscape at Birch Run and become a new attraction of its own.

Treetops Adventures and Sky Trails ropes course: The Mall of America in Bloomington, Minnesota has an indoor version as shown to the right. It is currently the world's tallest Sky Trails ropes course, made by Rope Courses Inc. Varying heights and difficulty levels make it appropriate for every age and skill level. The photo of the wooden treetop adventure is from Trollhaugen in Western Wisconsin.

Zip lines are common in most parts of the country, however, if a zip-line course of superior length and height could be combined with the other playscape amenities and attractions, it then has the potential to be a destination by itself. Due to the relatively flat landscape, Zip Lines would have to begin from tall towers. Visually exciting crossings such as forests, ravines, rivers and lakes add to the appeal.



Chesaning - Glamping

Glamping, or glamorous camping, is a style of camping that offers guests added amenities like running water, air conditioning, televisions and sofas. These types of camps are often found in scenic locations and are desired by the traveler seeking luxury hotel amenities as well as the recreational camping experience. One can experience the glamping lifestyle through a variety of structures, including tree houses, yurts, domes, eco-pods, lodges, caves, igloos, cabins and barns. Such destinations are located throughout the United States in California, Washington, Colorado, Montana and the Appalachian Mountain Range. This concept could be considered for a variety of destinations in the Great Lakes Bay Region, including Chesaning.

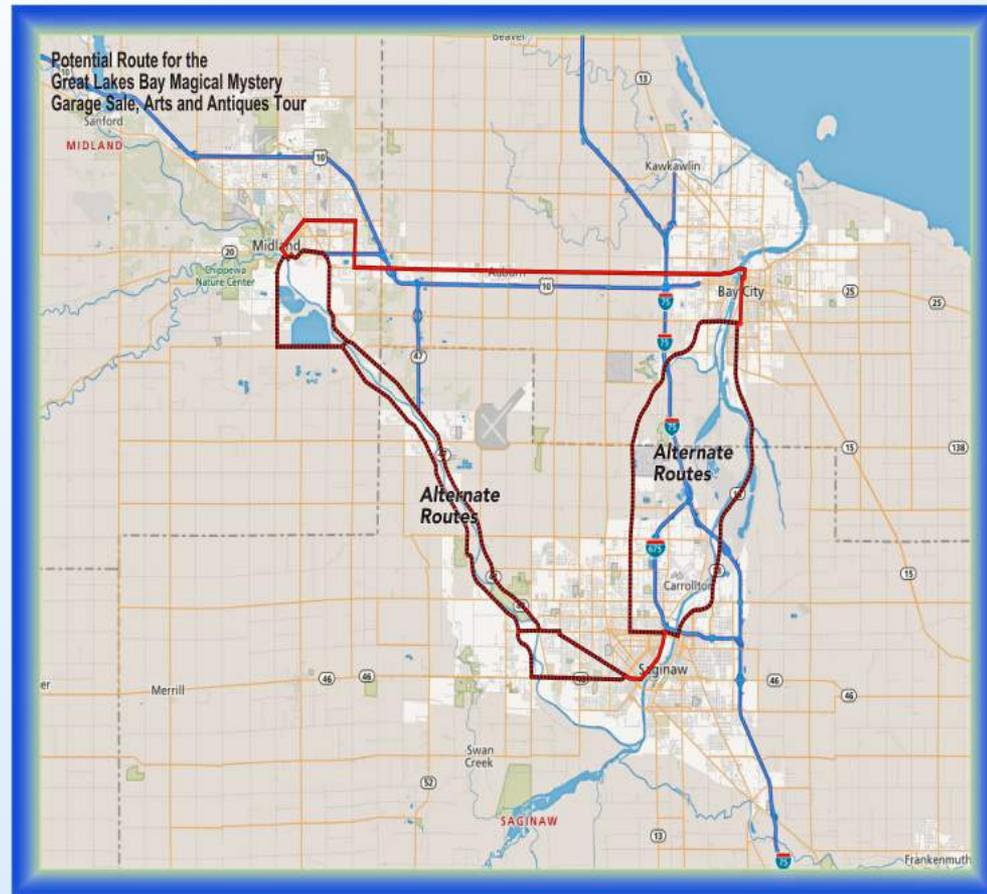


Great Lakes Bay Magical Mystery Garage Sale, Arts and Antiques Tour, and Classic and Muscle Cars Parade and Expo

Much like the U.S. 127 Yard Sale, the world's longest yard sale from Addison, MI to Gadsden, AL, with 2,200 vendors, the Magical Mystery Garage Sale, Arts and Antiques Tour would have a simple triangle of roadways through all three main cities, featuring garage, yard and flea market sales. The old National Road of U.S. 40, from Baltimore to St. Louis has also begun a more Antique-and-Flea-Market themed road tour.

The Great Lakes Bay Region route should follow the old highway routes between the three cities. Most of these have been replaced with 4-lane highways. Yard sales do not lend themselves well to 65-mile-per-hour highways. Using the old highways would be a historic and logical route in most places. Typically, this event would run for three days in summer or late spring.

An event to tie-in to car enthusiasts and antique buyers could be a Classic Cars and Muscle Cars Parade and Swap. A road parade along the rural old highways would be another enthusiast's event. Flow of cars could be managed by a stronger licensing procedure on closed roads between the three cities, winding up at a county fairground. The figure to the right is a sample route for the tour.



THANK YOU