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# MIGRATION AND MOVERSHP ANALYSIS

— Appendix Four —

## An Analysis of Residential Market Potential

The Urban Core and Urban Center Study Areas

The City of Kalamazoo,  
Kalamazoo County, Michigan

March, 2023

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Residential Market Analysis Across the Urban-to-Rural Transect

## MIGRATION AND MOVERSHP ANALYSIS AN ANALYSIS OF RESIDENTIAL MARKET POTENTIAL

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The analysis of internal migration and movership rates by tenure within the City of Kalamazoo has been based on census tract data for the city, and aggregated within three Study Areas: the Urban Core Study Area (the Central Business District); the Urban Center Study Area (all or part of the neighborhoods surrounding the Core: Northside, Eastside, Edison, Millwood, Westnedge Hill, Southside, Vine, Oakland/Winchell, Western Michigan University/KRPH, West Main Hill, Stuart, and Douglas); and the General Urban Study Area (the rest of the city not included in the Urban Core or the Urban Center).

Based on census data, the Urban Core Study Area includes a part of census tract 2.01. The Urban Center Study Area includes the rest of census tract 2.01, parts of census tracts 5, 3, 2.02, 55.01, 18.01, 17.02, 12, and 16.01, and the entirety of census tracts 15.04, 1, 9, 10.02, 10.01, 11, and 6.01. The General Urban Study Area includes portions of tracts 12, 29.06, 16.01, 17.02, 18.01, 18.03, 55.01, 2.02, 3, and 5, and the entirety of tracts 15.08, 15.09, 15.10, 15.11, 16.03, 16.04, 17.01, and 18.02.

NOTE: For partial census tracts, data has been allocated proportionate to the number of households within each Study Area.

The American Community Survey (ACS) publishes population mobility for the census tract of destination, originating from:

- The same municipality,
- The same county outside of the municipality,

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- Other counties in the same state, and
- Other counties outside the state.

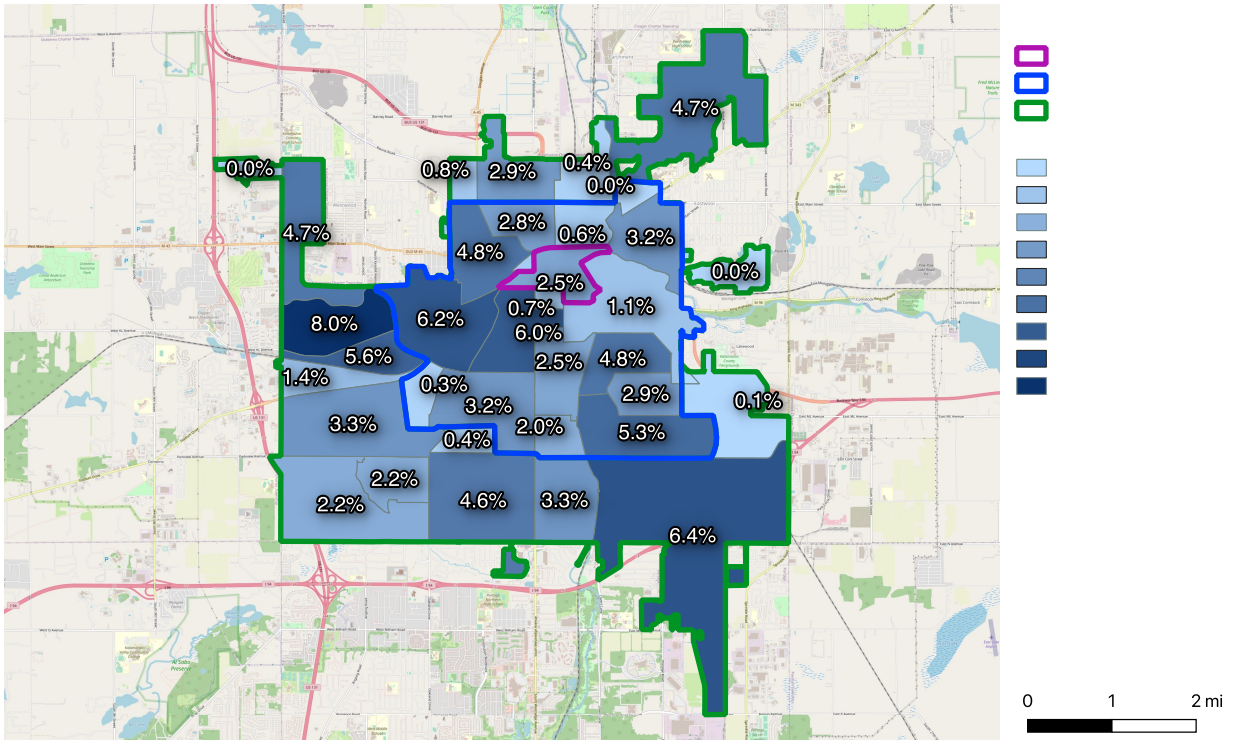
The ACS also publishes population mobility by tenure for the census tract of destination, originating from:

- The same county,
- Other counties in the same state, and
- Other counties outside the state.

These data were used to map mobility patterns in the City of Kalamazoo across the three Study Areas and individual census tracts within the city.

Zimmerman/Volk Associates also mapped these data using the ZVA Mobility Distribution Index, a relative measure of destination “attractiveness” from various sources. The mobility indices measure the market activity of a geographical unit—in this case a census tract—in relation to its base population share of the total market under examination. The index is indicated by color, ranging from blue for a low index, yellow for a “fair share” index, to red for a high index. A low index could be the result of a range of circumstances: examples include economic stagnation or contraction, a lack of housing type diversity, high housing costs, low housing turnover, and/or constraints on the development of new housing.

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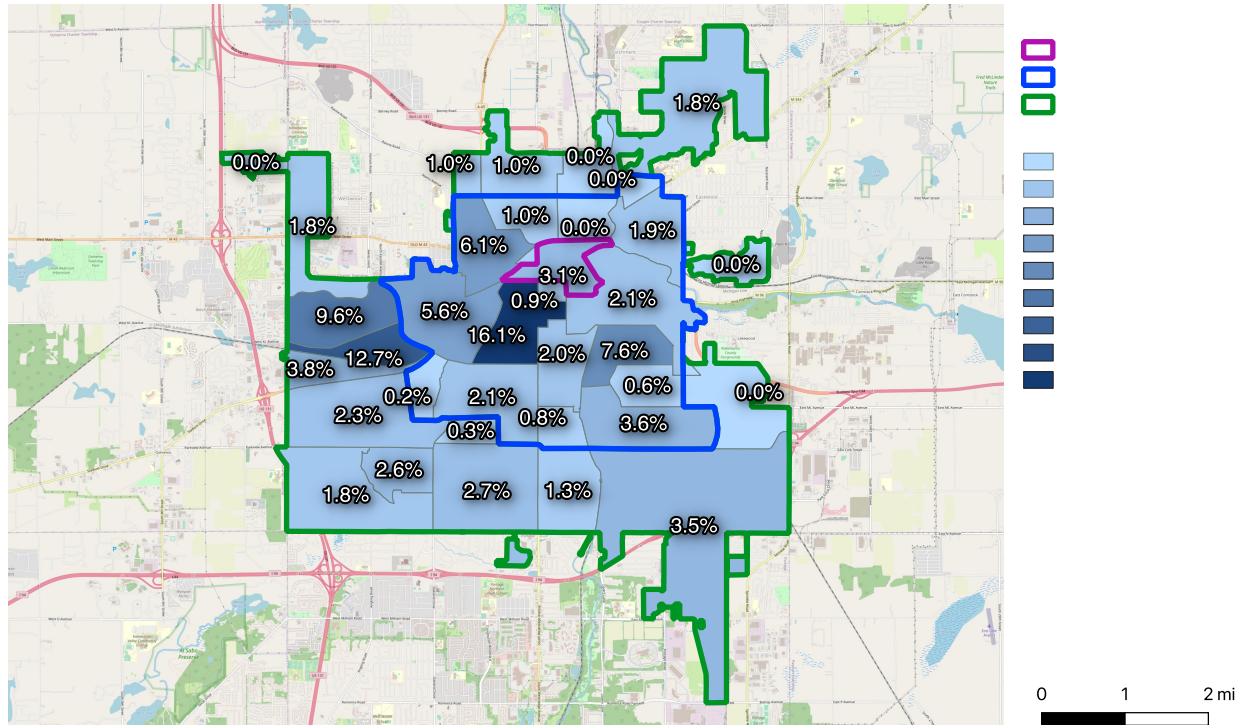


The Urban Core Study Area accounted for 2.5 percent of the population, the Urban Center Study Area contained 43.8 percent, and the General Urban Study Area comprised the remainder at 53.7 percent of Kalamazoo’s population.

The distribution of Kalamazoo’s population across census tracts identifies where the population currently exists, and is used as the denominator in the formula for measuring the Mobility Distribution Index. Areas including the university, the historic neighborhoods south of Downtown, and the southern area adjacent to the airport contained large percentages of the city’s population.



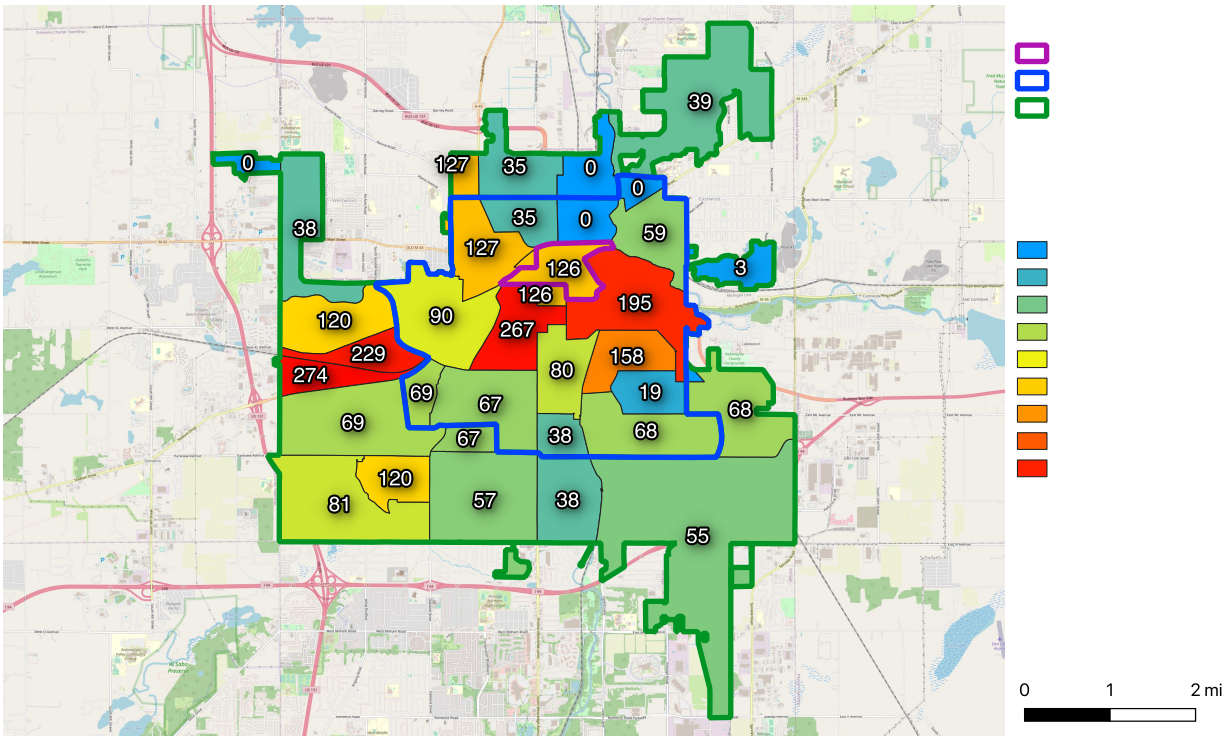
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The Urban Core captured 3.1 percent of movers within Kalamazoo, a larger share than its percentage of population. The Urban Center captured 48.8 percent of movers within the city, five points higher than its population percentage. The General Urban Study Area showed 48.1 percent of intra-city movers, more than five points lower than its total percentage of Kalamazoo’s population.

The destinations of intra-city movers is used as the numerator in the formula for measuring the Mobility Distribution Index. The historic neighborhoods located in the census tract to the south of the Urban Core proved to be the most popular destination. Neighborhoods along the corridor to the west of the university also showed a high share of movers, as have the developing neighborhoods to the southeast of the Urban Core.

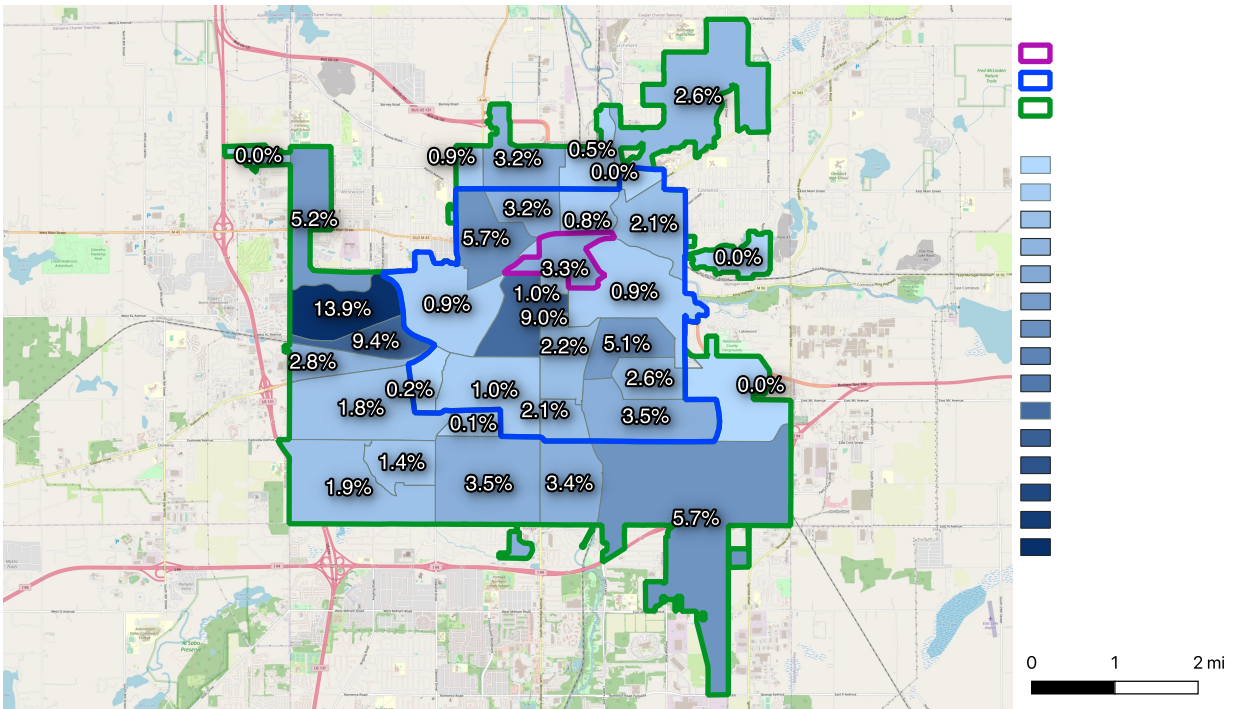
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Among movers within Kalamazoo, the Urban Core Study Area had the largest difference between its actual share of movers and its fair share of movers, higher by approximately 26 percent. The Urban Center captured 11 percent more movers based on its share of the population. Conversely, the General Urban Study Area captured 10 percent less.

Census tracts shown in red or orange on the map above indicate that the share of movers was higher than the share of Kalamazoo’s population. Yellow indicates that the share of movers was similar to the share of population, and blue or green indicates that the share of movers was less than the share of population (a zero can indicate that either there were no movers or there was very little or no population in the census tract). Historic neighborhoods to the south and east of the Urban Core showed very high indices, as did the corridor to the west.

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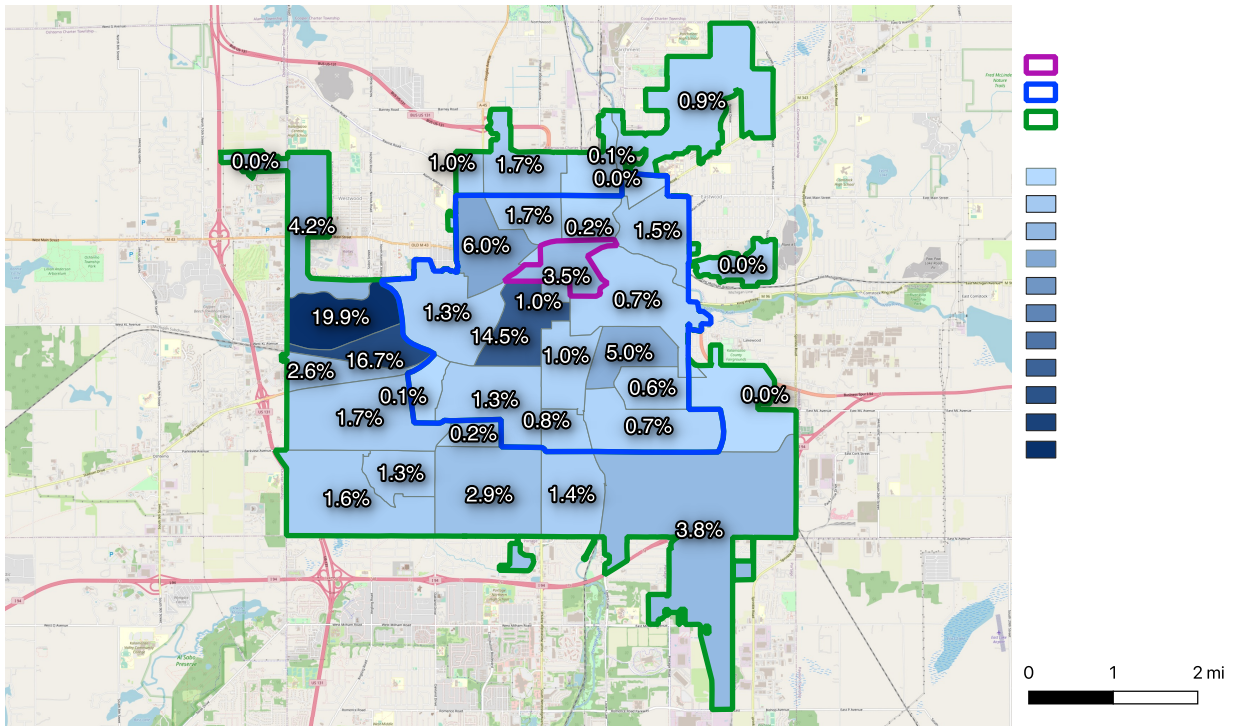


The distribution of the renter population is used as the denominator for all Renter Mobility Indices.

A larger share of the city’s renters live in the Urban Core than its share of total population; the same applies to renters in the General Urban Study Area. A lower percentage of Kalamazoo’s renters live in the Urban Center Study Area than its share of total population.

High percentages of the population living in rental units are concentrated in a few western tracts, and just to the south of the Urban Core.

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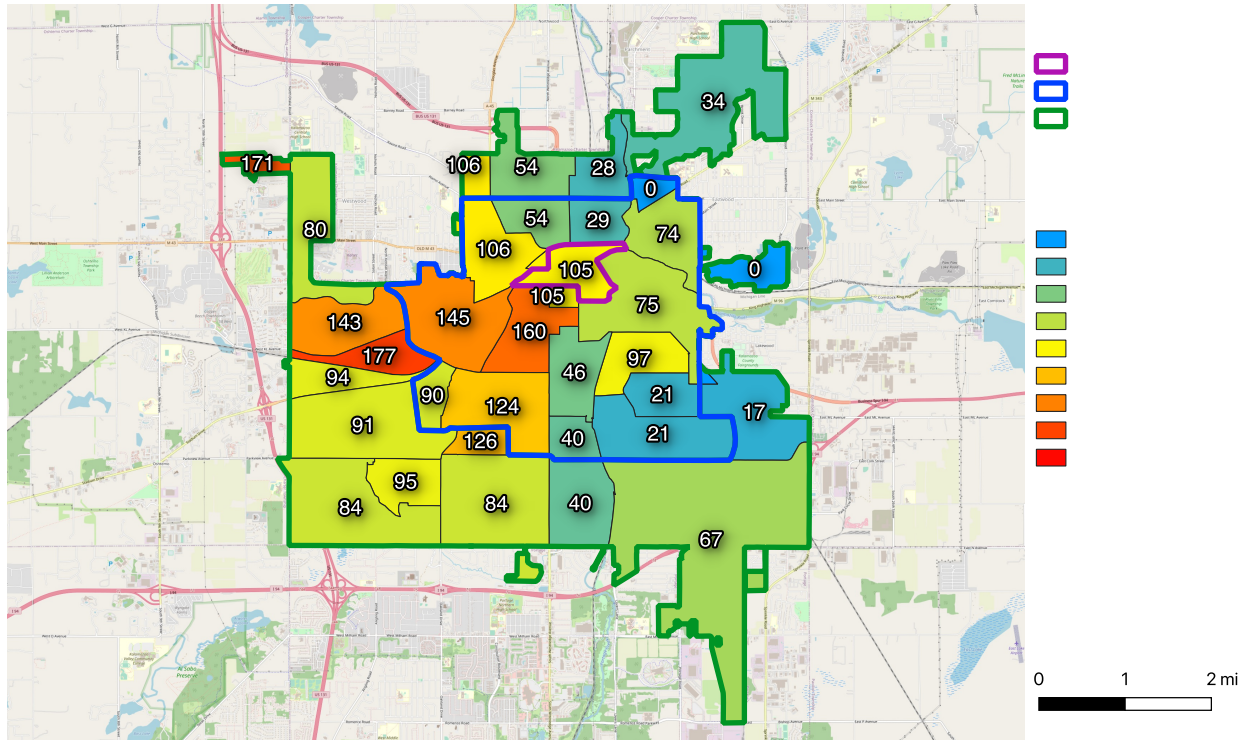


The Urban Core Study Area captured a similar percentage of renter movers as its percentage of renters overall. The General Urban Study Area captured slightly more renter movers than its percentage of renters, and the Urban Center Study Area slightly fewer.

From the census tract map, it is clear that a large percentage of Kalamazoo’s renters sign new leases in the western tracts along the corridor to the west of the university, as well as the tract directly southwest from the Urban Core.



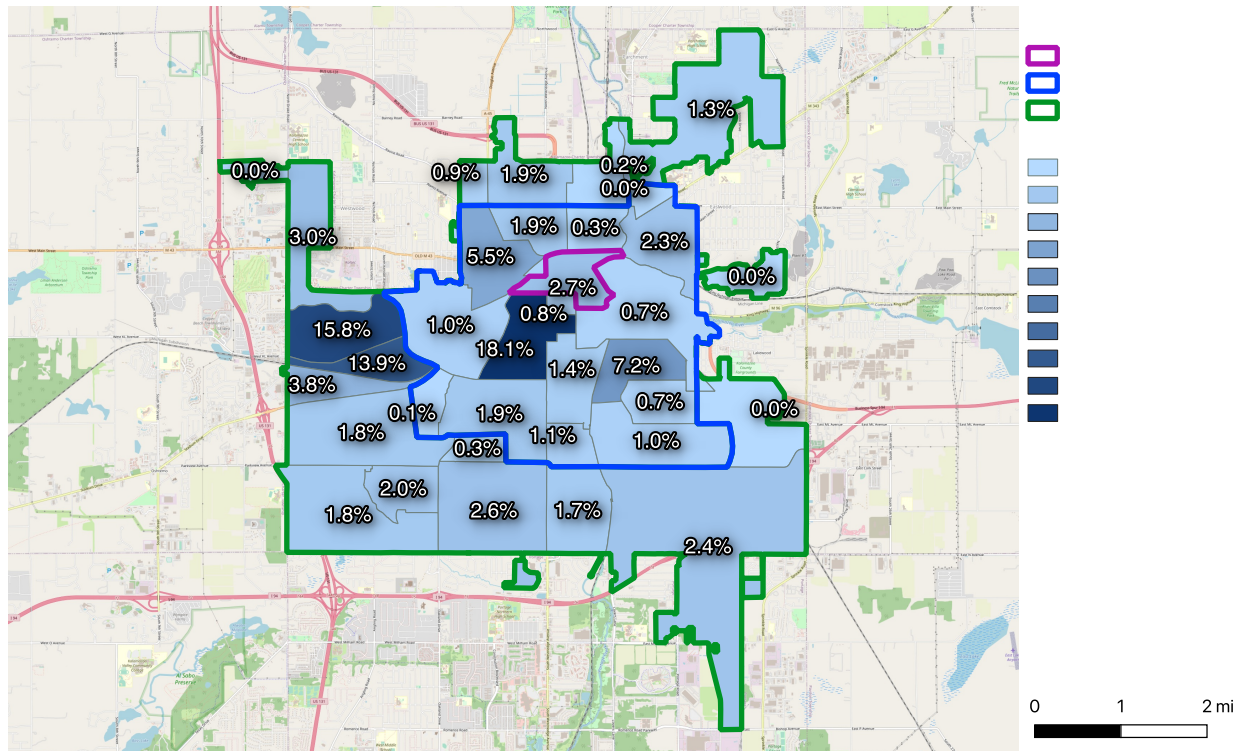
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Both the Urban Core Study Area and General Urban Study Area showed approximately five percent more renter movers compared to their share of Kalamazoo’s overall renter population. The Urban Center Study Area showed approximately seven percent fewer renter movers than was expected.

The tracts stretching from outside the Urban Core Study Area to the west proved to contain either the most rental turnover or new construction of rental units, as those tracts showed the highest indices among tracts with significant population.

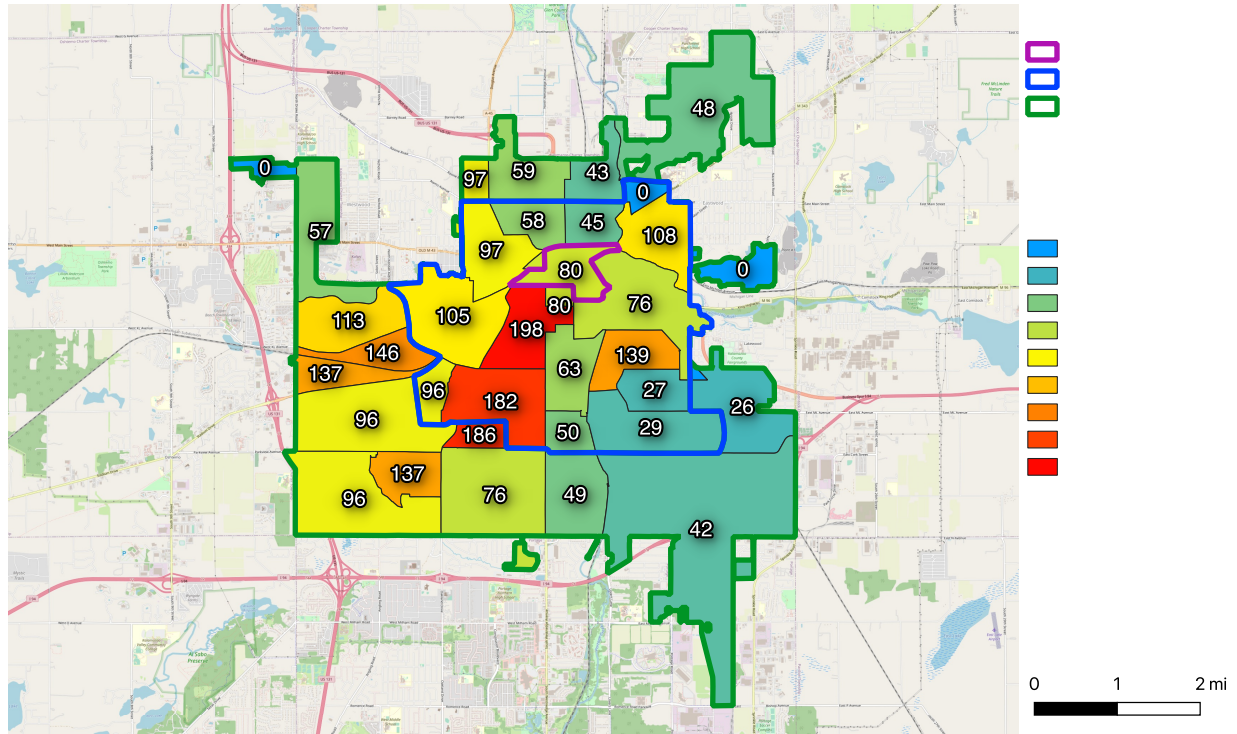
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The Urban Core experienced less than its share of population in terms of renter movers originating within Kalamazoo County (essentially movers within the city because few movers overall originated from the balance of the county). As noted previously, the Urban Core is a popular destination for renters overall, indicating its movership numbers originate from long-distance movers. The General Urban Study Area saw fewer movers originating from Kalamazoo County than its percentage of renters, while the Urban Center saw more movers from within the county.

As with the Urban Core Study Area, it should be noted that the very low percentage of renter movers to the tract containing the university indicates that this tract is primarily a destination for long distance movers. The same corridor leading west out of the Urban Core shows a large percentage of renter destinations.

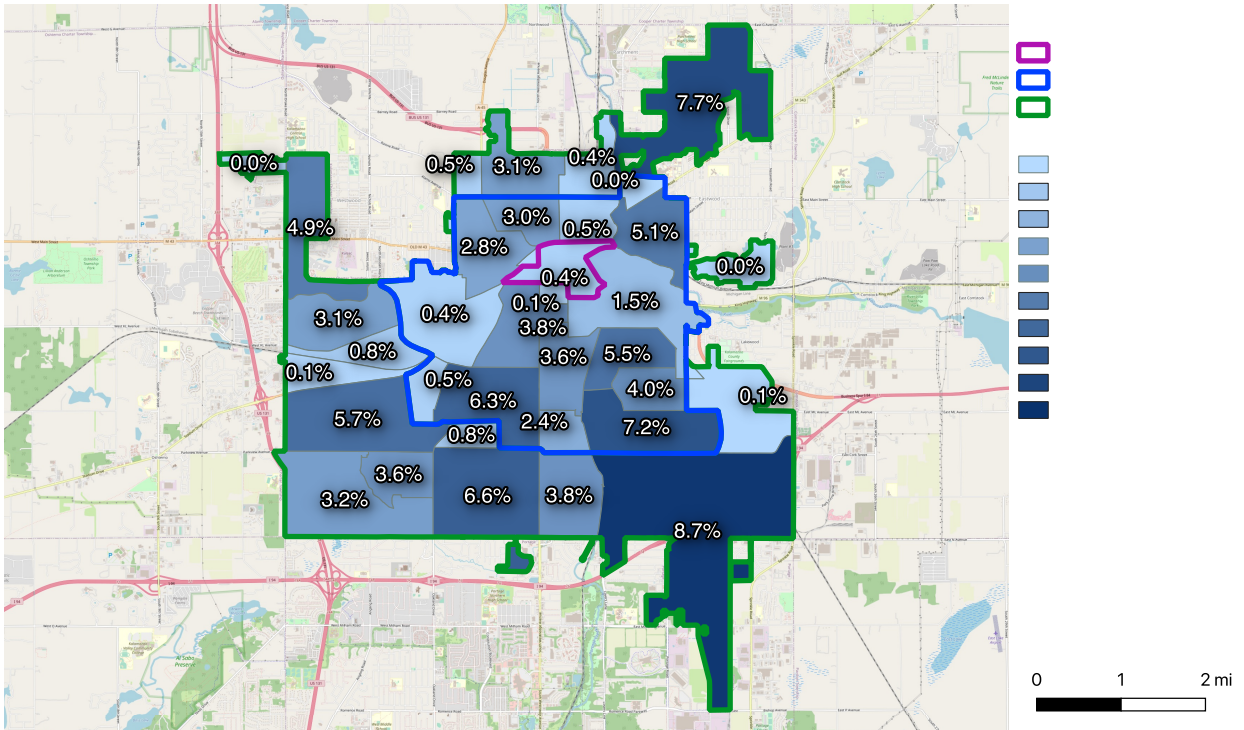
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The Urban Core Study Area captured approximately 20 percent fewer renter movers than its share of total movers within Kalamazoo County, the Urban Center captured seven percent more, and the General Urban Study Area captured five percent less.

Two tracts to the south of the Urban Core captured the highest percentage of renter movers from within Kalamazoo County relative to their percentage of renters overall, encompassing some of Kalamazoo’s historic and most attractive neighborhoods.

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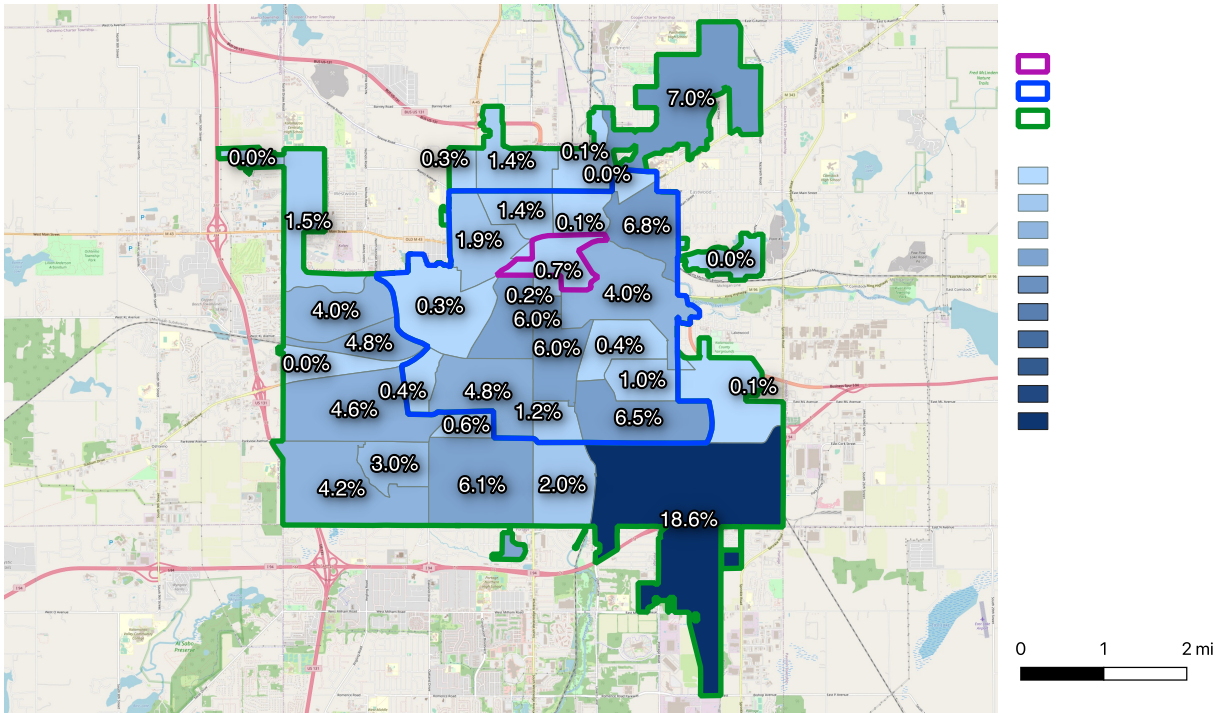
The distribution of population living in owner-occupied units is used as the denominator for all Buyer Mobility Indices.

The Urban Core contained a very low percentage of the city’s population in owner-occupied units, under one percent, while the Urban Center showed approximately 41 percent, and the General Urban Study Area held over 58 percent of Kalamazoo’s population living in owner-occupied units.

Both the northeastern and southeastern extremities of the city show the largest percentages of owner-occupiers, possibly indicating suburban growth designations containing a large number of single-family detached ownership neighborhoods.



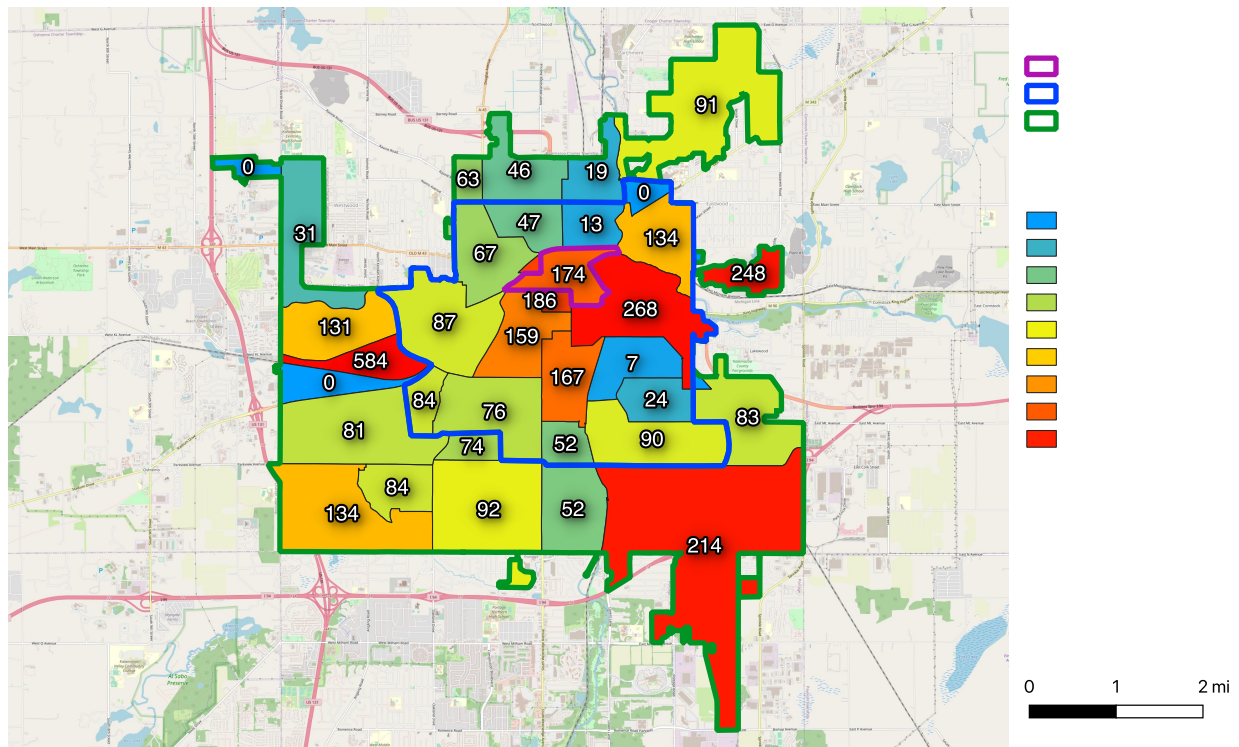
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The Urban Core Study Area saw a slightly larger percentage of buyers than its share of population living in owner-occupied units; however, both percentages are below one percent. Both the Urban Center Study Area and the General Urban Study Area showed similar percentages of buyers as their percentage of population living in owner-occupied units.

The census tract containing the airport was the clear outlier in terms of percentage of buyers, possibly indicating an area where new construction has occurred.

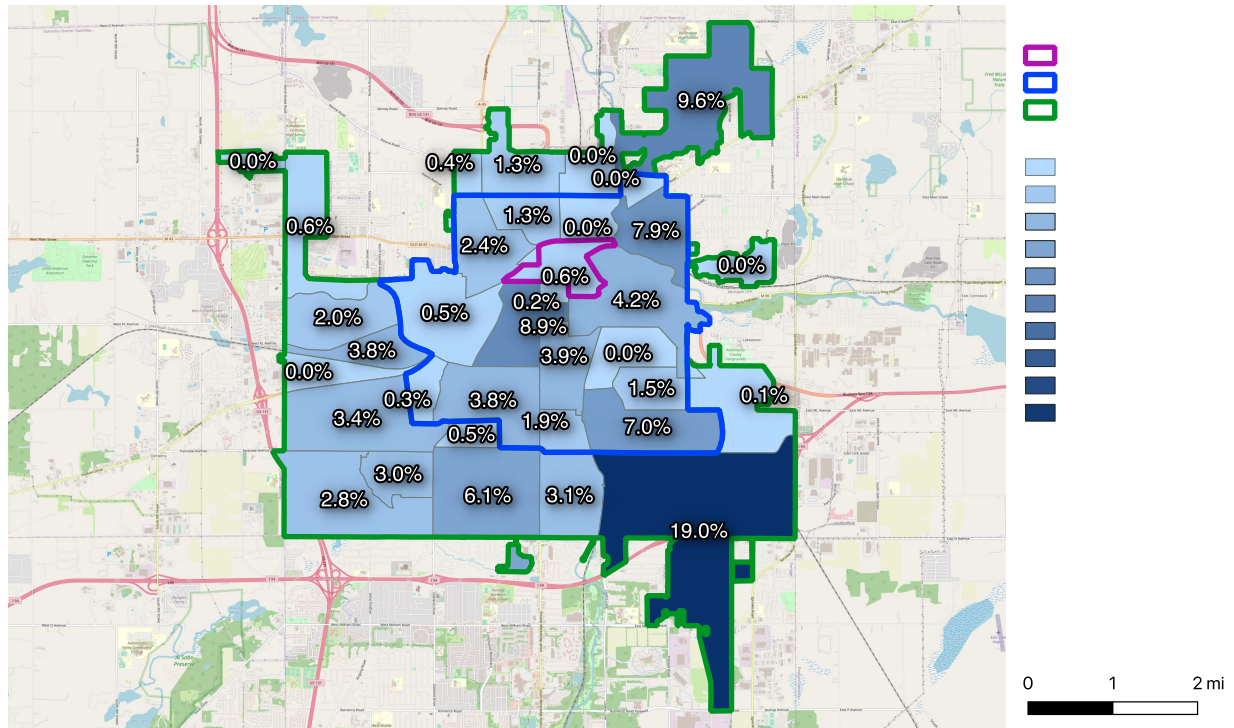
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The Urban Core Study Area saw approximately 74 percent more buyers compared to its share of the population in owner-occupied units (which, however, is a very low percentage). Both the Urban Center and General Urban Study Areas captured nearly exactly their fair share of buyers.

Buyers showed strong preferences for the emerging neighborhood to the southeast of the Urban Core, possibly indicating affordability for value in that area, while the few owner-occupied units to the west of the university were offered and sold at high rates relative to other areas of the city.

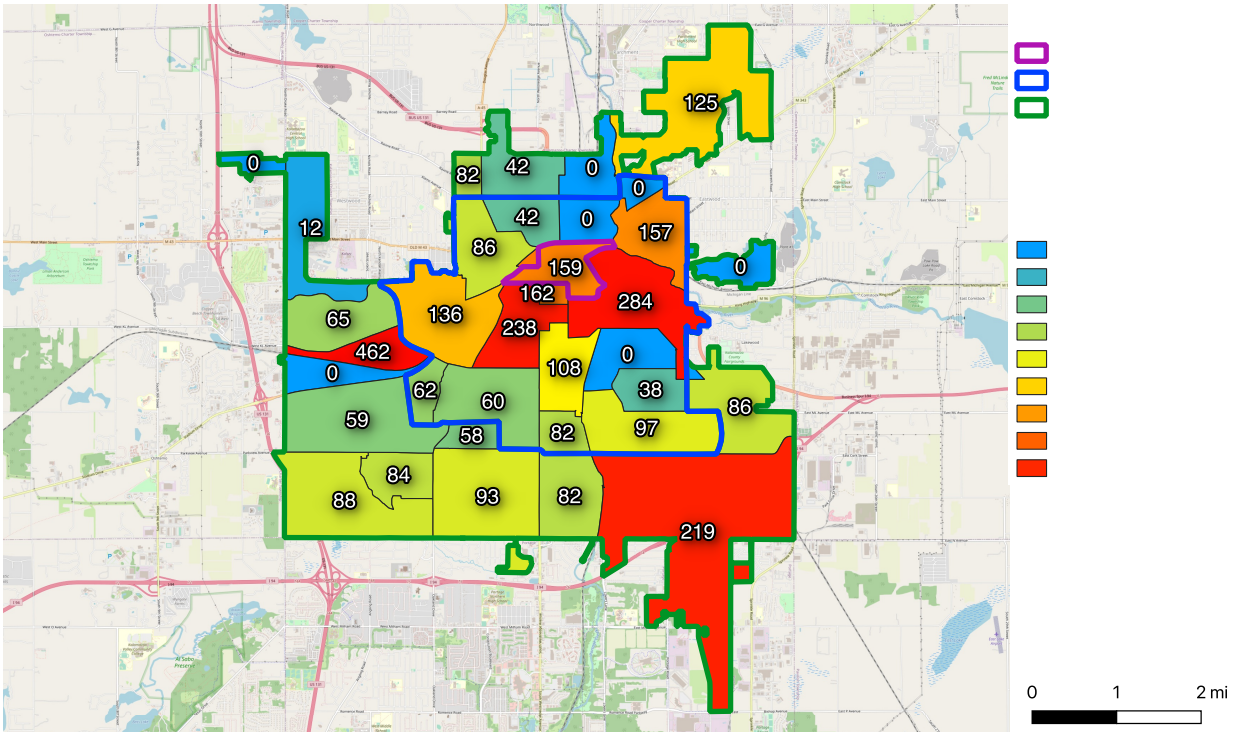
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All three study areas had a similar percentage of buyers originating within Kalamazoo County as their percentage of buyers from any location.

Buyers from within the county overwhelmingly bought units at the southeastern and northeastern tip of the city, as well as just to the south and northeast of the Urban Core.

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Although the Urban Core Study Area saw 59 percent more sales relative to its share of owner-occupiers, there was a small number of owner-occupied units in the Study Area. Both the Urban Center and General Urban Study Areas captured almost exactly their fair share of buyers from within Kalamazoo County.

Buyers within the county preferred the same locations as buyers in general, except that areas closer to the Urban Core, but not in the Urban Core itself, saw higher sales relative to their share of owner-occupiers.

DATA SOURCES: Table 1: Claritas, Inc.; U.S. Census Bureau;  
 Zimmerman/Volk Associates, Inc.





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### ASSUMPTIONS AND LIMITATIONS—

Every effort has been made to insure the accuracy of the data contained within this analysis. Demographic and economic estimates and projections have been obtained from government agencies at the national, state, and county levels. Market information has been obtained from sources presumed to be reliable, including developers, owners, and/or sales agents. However, this information cannot be warranted by Zimmerman/Volk Associates, Inc. While the proprietary Residential Target Market Methodology™ employed in this analysis allows for a margin of error in base data, it is assumed that the market data and government estimates and projections are substantially accurate.

Absorption scenarios are based upon the assumption that a normal economic environment will prevail in a relatively steady state during development of the subject property. Absorption paces are likely to be slower during recessionary periods and faster during periods of recovery and high growth. Absorption scenarios are also predicated on the assumption that the product recommendations will be implemented generally as outlined in this report and that the developer will apply high-caliber design, construction, marketing, and management techniques to the development of the property.

Recommendations are subject to compliance with all applicable regulations. Relevant accounting, tax, and legal matters should be substantiated by appropriate counsel.





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